



Education

# **Funding Manual for School Authorities 2006-2007 School Year**


**For School Jurisdictions,  
Charter Schools,  
Accredited-Funded Private Schools and  
Private ECS Operators,  
With Students in Grades 1 to 12, and/or  
Children in Early Childhood  
Services (ECS)**

**FUNDING MANUAL**  
**FOR SCHOOL AUTHORITIES**  
**2006-2007**  
**SCHOOL YEAR**

This manual is issued under authority of the following:

- *School Act, RSA 2000, Section 176*
- *Alberta School Foundation Fund Regulation (AR 250/96, amended by AR 166/2001)*
- *Government Organization Act, Section 13*
- *Learning Grants Regulation (A.R.77/2003)*

  
Authorized By  
Minister of Education

  
Date



ALBERTA  
EDUCATION

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Office of the Minister  
Deputy Government House Leader

### Message from the Minister

I am pleased to provide you with Alberta Education's *Funding Manual for School Authorities* for the 2006–2007 school year.

I have authorized this *Manual* for use by school jurisdictions, charter schools, private schools, and private Early Childhood Services (ECS) operators to access Alberta Education funding. The *Manual* provides details on the funding available for the 2006–2007 school year including applicable funding rates, criteria, procedures, and reporting requirements. Funding from Alberta Education supports the provision of approved education programs for students in Grades 1–12 and ECS children.

A Summary of Significant Changes is included, which highlights some of the changes for the 2006–2007 school year. I encourage you to review the *Manual*, noting the additions and revisions as indicated by the notations “New” and “Revised” in the left-hand margin.

Any questions or comments may be directed to the appropriate contact listed in the Introduction section.

Please accept my best wishes for a successful school year in 2006–2007.

Sincerely,

Gene Zwozdesky  
Minister of Education  
Government House Leader

# **SUMMARY OF SIGNIFICANT CHANGES**

## **FUNDING MANUAL FOR SCHOOL AUTHORITIES**

### **FOR THE 2006-2007 SCHOOL YEAR**

The following information outlines the changes to the *2006-2007 Funding Manual for School Authorities* that are significant or noteworthy. Please refer to the appropriate section(s) of the funding manual for more details.

#### **Table of Contents**

- A new part has been added: Part 7 – Capital.
- Four new sections have been added: Section 1.30 Plant Operations and Maintenance; Section 1.31 Fuel Price Contingency; Section 7.1 School Facilities; and, Section 7.2 Infrastructure Maintenance and Renewal (IMR).

#### **Introduction**

- Page 1: An Allocation Description has been added to each section in Part 1 to explain why the funding is provided, while still allowing for maximum flexibility.

#### **Part 1: Renewed Funding Framework for School Jurisdictions**

- Page 2: A new limitation has been added for the Capital sections describing that this funding can only be used for capital needs.
- Pages 3 – 7: Changes have been made to reflect the revisions to the Accountability Pillar.

#### **Section 1.1 – ECS Base Instruction Funding**

- Page 1: Allocation criteria #1 has been revised to indicate that Family-Oriented Programming is only for children with severe special needs.

#### **Section 1.2 – Base Instruction Funding**

- Page 6: Allocation criteria 9(l) has been revised to reflect that Knowledge and Employability (K&E) courses have replaced Integrated Occupational (IO) courses and are funded at 8/5 times the CEU value.
- Page 7: Allocation criteria 9(q) is new and reflects that 35 CEUs of funding will be provided for eligible high school refugee students.

#### **Section 1.3 – Outreach Base Funding**

- Page 1: Requirement #1 indicates that applications for new Outreach programs must be submitted by March 31.

#### **Section 1.4 – Home Education Funding**

- Wording throughout this section has been revised to improve clarity.



### **Section 1.6 – Program Unit Funding (PUF)**

- Page 3: Requirement #1 indicates that the deadline for the submission of PUF applications has been changed to December 22, 2006.
- Page 4: Requirement #3 indicates that for PUF children who are identified or enrolled after the PUF application submission date, school jurisdictions have until April 1 to add any new children to the original application.

### **Section 1.7 – Severe Disabilities Profile Funding**

- Page 1: Allocation criteria #2 has been revised to indicate that charter schools claim Severe Disabilities Funding under Section 3.3 rather than under Section 1.7 as charter schools are not funded on a profile basis.

### **Section 1.8 – English as a Second Language Funding**

- Page 2: Allocation criteria #5 has been revised to show that the 5 year funding cap is under review pending further analysis.

### **Section 1.15 – Small Board Administration Funding**

- Page 1: The allocation formula has been revised to show that funding is provided for each charter school site up to a maximum of four sites.

### **Section 1.21 – Special Transportation Funding**

- Page 3: Allocation criteria #8(a) indicates that Transportation Funding for Family – Oriented Programming sessions is provided only for children with a severe disability/delay.

### **Section 1.24 – Stabilization Funding**

- Page 2: In allocation criteria #4, the example has been simplified to improve clarity in understanding the calculation of this funding.

### **Section 1.30 – Plant Operations and Maintenance Funding**

- The responsibility for this funding has been transferred from Alberta Infrastructure and Transportation to Alberta Education. This funding is provided for the maintenance and operation of schools to ensure they are a safe, clean and comfortable environment for students. The formula for this funding will be reviewed for the 2007-2008 school year.

### **Section 1.31 – Fuel Price Contingency Funding**

- This new funding, in addition to other Transportation Funding, is provided to address the high cost of diesel fuel for school buses.

## **Part 2: Funding for Private ECS Operators**

### **Section 2.1 – ECS Base Instruction**

- Page 1: Condition #1 has been revised to indicate that Family-Oriented Programming is only for children with severe special needs.

### **Section 2.3 – Program Unit Funding (PUF)**

- Page 2: Requirement #1 indicates that the deadline for the submission of PUF applications has been changed to December 22, 2006.
- Page 3: Requirement #3 indicates that for PUF children who are identified or enrolled after the PUF application submission date, the private ECS operator has until April 1 to add any new children to the original application.

### **Section 2.5 – ECS Special Transportation**

- Page 1: Condition 2(a) indicates that Transportation Funding for Family –Oriented Programming sessions is provided only for children with a severe disability/delay.

## **Part 3: Funding for Accredited-Funded Private Schools**

### **Section 3.1 – Base Instruction Funding**

- Page 5: Condition 9(l) has been revised to reflect that Knowledge and Employability (K&E) courses have replaced Integrated Occupational (IO) courses and are funded at 8/5 times the CEU value.
- Page 5: condition 9(q) is new and reflects that 35 CEUs of funding is provided for eligible high school refugee students.

### **Section 3.4 – Home Education Funding**

- Wording in this section has been revised to improve clarity.

## **Part 5: Targeted Funding for Provincial Priorities**

### **Section 5.3 – SuperNet Service Funding**

- The name of this section was changed to prevent confusion and improve clarity.

### **Section 5.4 – Small Class Size Initiative Funding**

- This section has been revised to reflect that funding is provided to meet the class size average guidelines recommended by the Alberta Commission on Learning.

## **Part 7: Capital**

### **Section 7.1 – School Facilities Funding**

- This is a new section. Responsibility for this funding has transferred from Alberta Infrastructure and Transportation to Alberta Education. This funding for school jurisdictions is for the preservation of a current school facility or for the construction of a new school facility as approved by Alberta Education.

### **Section 7.2 – Infrastructure Maintenance and Renewal (IMR) Funding**

- This is a new section. Responsibility for this funding has transferred from Alberta Infrastructure and Transportation to Alberta Education. This funding is provided to upgrade or replace building components that have failed or may pose problems. Repairs may be necessary to meet health and safety requirements, to extend the useful life of a school facility, and to maintain the quality of the school environment. The formula for this funding is currently under review.

## **Part 8: Payments to School Authorities**

### **Sections 8.1, 8.2, and 8.3 – Funding Rates**

- The funding rates have been revised to reflect the funding increases in the Budget 2006 announcement, the June 29, 2006 announcement of Transportation Funding increases and the July 11, 2006 announcement of additional funding increases. The Base Instruction rates are increased by 4%, Transportation Funding rates are increased by 5.7%, the Severe Disabilities Profile numbers are increased by 4% and all other funding rates are increased by 2%.

### **Section 8.5 – Payment Schedule for Private ECS Operators**

- The last PUF payment of the school year has been changed from May to June to better match the timing of the PUF application approval process.

### **Glossary of Terms**

- A new definition has been added to the Glossary for a High School Refugee Student.
- The name of the definition for Supervising Board has been changed to Associate Board according to terminology used in the new Home Education Regulation.

**INTRODUCTION**

- ⇒ Foreword
- ⇒ Contacts for Assistance
- ⇒ References and Where to Obtain Them
- ⇒ General Conditions That Apply to Funding

**PART 1 SCHOOL JURISDICTION FUNDING**

**For School Boards, Francophone Regional Authorities, and Charter Schools**

**RENEWED FRAMEWORK FOR FUNDING SCHOOL JURISDICTIONS**

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**Revised**

This Manual explains how funding is made available to **school authorities** and how it can be obtained. The information in this Manual is not intended as a substitute for provincial legislation, policy, standards, regulations, specific instructions, or explanatory material issued by various branches of Alberta Education.

Alberta Education releases the Funding Manual for School Authorities for the use of central office administrators, school administrators and other parties involved in the funding of Early Childhood Services (ECS) to Grade 12 education. It will assist **school jurisdictions, Francophone regional authorities, charter schools, private ECS operators** and **accredited-funded private schools** in accessing funding from Alberta Education.

### **Section Format**

The format for each section of the Manual describing the funding that is available to **school authorities** is as follows:

#### **PART 1: School Jurisdictions**

**New**

**ALLOCATION DESCRIPTION:** describes why this funding is provided. This is a method of allocating funding and is not intended to prescribe how this funding must be used. School boards have maximum flexibility in determining how these funds should be spent.

**ALLOCATION FORMULA:** the formula used to determine the amount of funding.

**ALLOCATION CRITERIA:** describes the criteria under which the funding is provided.

**DOCUMENTATION AND REPORTING REQUIREMENTS:** the documents and reporting required of **school jurisdictions** to access funding.

**ADDITIONAL INFORMATION:** other information useful to **school jurisdictions**.

**REFERENCES:** other documents that should be used in conjunction with this Funding Manual.

**PARTS 2 – 7: School Authorities****Revised****PURPOSE:** a short statement describing why this funding is provided.**CONDITIONS:** the conditions under which the funding is provided.**REQUIREMENTS:** what **school authorities** must do to receive funding.**CONSIDERATIONS:** other information useful to **school authorities**.**REFERENCES:** other documents that should be used in conjunction with the Funding Manual.**Information Required for Funding**

Some funding is provided on the basis of student information that **school authorities** have reported directly to the Information Services Branch. Some funding may also be dependent upon **school authorities** submitting a form to the School Finance Branch. All forms referred to in the Manual can be found in the FORMS section of the Manual.

**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.

**Identification of Content Changes**

Users are encouraged to familiarize themselves with this document in its entirety. Changes are identified in each section with the terms “New” and “Revised”. A list of major changes is provided in the accompanying document: *Summary of Significant Changes for 2006-2007*.



**CONTACT ALBERTA EDUCATION FOR ASSISTANCE**

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.

<b>BRANCH</b>	<b>CONTACT</b>	<b>PHONE #</b>
School Finance	Jeff Willan Kenneth Poon Mark Lalumiere Mary-Ellen Deising	(780) 422-0930 (780) 422-1098 (780) 422-6550 (780)-422-0312
Financial Reporting and Accountability	Dale Fulford	(780) 422-0870
Special Programs	Valerie Keates Ron Taylor (Calgary)	(780) 422-6326 (403) 297-5021
Field Services		
Zone 1	Terry Wendel	(780) 427-5394
Zone 2 and 3	Doug McDavid	(780) 427-9296
Zone 4	Loraine Steele	(780) 427-5381
Zone 5	David Woloshyn	(780) 415-9312
Zone 6	Doug Coffin	(780) 427-5377
School Improvement	Dianna Millard	(780) 427-7882
Aboriginal Services	Evelyn Good Striker	(780) 415-9300
Information Services (IS)	Help Desk	(780) 427-5318
<b>Updated</b> Governance Support	Rick Hayes	(780) 427-7235
French Language Services	Debby Johnston	(780) 427-2940
Budget and Fiscal Analysis	Gene Williams	(780) 427-2055
Curriculum	Merla Bolender Jennifer Jackson (ESL)	(780) 427-2984 (780) 422-0624
Alberta Children and Youth Initiative	Sandi Roberts	(780) 422-9423

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BRANCH	CONTACT	PHONE #
Alberta Education –Capital Planning	Michael Walter	(780) 644-7149
Alberta Infrastructure – Capital Programs Division	Mike Irving	(780) 422-7224

Any of the individuals above may be contacted by e-mail by typing their first name, (.) dot, last name followed by @gov.ab.ca, (e.g., [Jeff.Willan@gov.ab.ca](mailto:Jeff.Willan@gov.ab.ca)).

The 2006-2007 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/>.

Funding application forms should be submitted to the School Finance Branch at:

Alberta Education  
School Finance Branch  
8<sup>th</sup> Floor, Commerce Place  
10155 – 102 Street  
Edmonton AB T5J 4L5

**FAX:** (780) 427-2147

**DOCUMENTS:**

<i>Advisory Manual on Early Childhood Service for Incorporated Non-Profit Societies and Private Schools</i>	Available from the Alberta Education Web site – <a href="http://www.Education.gov.ab.ca">www.Education.gov.ab.ca</a> Contact: Zone Branches – see Contacts for Assistance section of the Introduction.
<i>Charter School Handbook</i>	Contact: Special Programs Branch (780) 422-6326
<i>ECS Program Unit Funding. A Handbook for ECS Operators</i>	Contact: Special Programs Branch (780) 422-6326
<i>First Nations, Métis, and Inuit Education Policy Framework – February 2002</i>	Contact: Aboriginal Services Branch (780) 415-9300
<i>Funding Manual for School Authorities 2006-2007</i>	Available from the Alberta Education Web site – <a href="http://www.Education.gov.ab.ca/funding/FundingManual/">http://www.Education.gov.ab.ca/funding/FundingManual/</a> .
<i>Guide to Education ECS to Grade 12 (2005)</i>	Available from the Alberta Education Web site – <a href="http://www.Education.gov.ab.ca">www.Education.gov.ab.ca</a> Click on Kindergarten to Grade 12, then select Legislation, Regulations and Policies.
<i>Guide to School Authority (School Board, Charter School, Private School) Planning and Results Reporting</i>	Available from the Alberta Education Web site – <a href="http://www.Education.gov.ab.ca">www.Education.gov.ab.ca</a> Click on Kindergarten to Grade 12, then click on Information for Administrators select Planning Resources for School Jurisdictions.
<i>Handbook for the Identification and Review of Students with Severe Disabilities</i>	Available on the Alberta Education Web site <a href="http://www.Education.gov.ab.ca/k_12/specialneeds/identificationhandbook.pdf">http://www.Education.gov.ab.ca/k_12/specialneeds/identificationhandbook.pdf</a>
<i>Kindergarten Program Statement Revised September 2005</i>	Contact: the Curriculum Branch (780) 422-0624 (Jenny Jackson)
<i>Policy, Regulations and Forms Manual</i>	Available from Alberta Education Web site – <a href="http://www.Education.gov.ab.ca">www.Education.gov.ab.ca</a> To access the Manual, click on Kindergarten to Grade 12 Education then select Legislation, Regulation and Policies.

*Private Schools Reference  
Manual (2003)*

Available from the Alberta Education Web site –  
[www.Education.gov.ab.ca](http://www.Education.gov.ab.ca)

*School Infrastructure Manual*

Contact: Alberta Infrastructure  
Capital Programs Division  
(780) 422-7224

*Special Education Definitions  
2005-2006*

Available on the Alberta Education Web site  
[http://www.Education.gov.ab.ca/k\\_12/specialneeds/specialdef.pdf](http://www.Education.gov.ab.ca/k_12/specialneeds/specialdef.pdf)

*Standards for Special Education,  
Amended June 2004*

Contact: Special Programs Branch  
(780) 422-6326

*Student Health Partnership  
Service Plan Guidelines for 2005-  
2006*

Contact: Alberta Children and Youth Initiative  
(780) 422-9423

*SIS Quick Reference Tables –for  
coding of students and children*

Available from the Alberta Education website at:  
[http://www.education.gov.ab.ca/technology/isb/current/QReference\\_Code\\_Table.pdf](http://www.education.gov.ab.ca/technology/isb/current/QReference_Code_Table.pdf)

For copies of “Alberta Statutes” referenced in this Manual, contact:

Queen’s Printer Bookstore  
Main Floor, Park Plaza  
10611 – 98 Avenue  
Edmonton AB T5K 2P7  
(780) 427-4952

OR

Queen’s Printer Bookstore  
John J. Bowlen Building  
602, 6207 – 7<sup>th</sup> Avenue S.W.  
Calgary AB T2P 0Y8  
(403) 297-6251

OR

For on-line access to the Statutes use <<http://www.qp.gov.ab.ca>>

For out of town calls, please dial 310-0000 to be connected toll free to any of the above numbers.

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 using the payment schedule and funding rates indicated 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**.
- Revised 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 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, for the results achieved and for the use of resources.
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 courses of study or education programs prescribed or authorized by the **Minister** are followed;
    - ii) ensuring that the amount of instructional time prescribed by the **Minister** is made available to a child or student in a school year;
    - Revised iii) ensuring that only those instructional materials authorized or approved by the **Minister** or the school board are used in **schools**;
    - 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 education are met; and
    - vi) providing special education programming for students with special needs.
  - c) meet the applicable requirements of the *Government Accountability Act* and the *Financial Administration Act*.

5. The documents listed in this Manual under “References and Where to Find Them” 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 program funding described in this Manual, including invoices, and the following information:

**Revised**

- a) an eligible enrollment count as of the **count date** for the school year;
  - b) copies of current **educational service agreements** or **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.
7. Alberta Education reserves the right to request and review documentation to substantiate data submitted that determines funding allocations and that assists in conducting financial and other reviews. These reviews may be conducted off-site or on-site in a **school authority**.
  8. An adjustment may be made in a payment or a penalty may be levied when a review or audit by Alberta Education indicates that:
    - a) a **school authority** has received funding to which it was not entitled - no limitation period; and
    - 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 in January and subsequently to a **private ECS operator** shall be withheld if the Audited Financial Statements or the Budget Report have not been properly completed in accordance with the respective Guidelines and submitted to the Financial Reporting and Accountability Branch by the due date. When the documents have been submitted and determined to be acceptable, payments will then be released.
  10. Payments may be withheld from **school jurisdictions** and **accredited-funded private schools** if the Audited Financial Statements or the Budget Report, or the School Board Three-Year Education Plan or the Annual Education Results Report (AERR), or any other information requested or required by the **Minister**, have not been properly completed in accordance with the respective Guidelines and submitted by the due date. When the documents have been submitted and determined to be acceptable, payments will be released.

11. **School authorities** must develop, keep current, and implement applicable written policies and procedures that are consistent with policies in Sections 1 and 2 of the *Policy, Regulations and Forms Manual*.
12. **ECS operators** who have received funding from Alberta Education to provide an **ECS program** and have decided to cease operation may be required to return a portion of their accumulated operating surplus to the Minister of Finance.
13. The **Minister** may fund a **school jurisdiction**, other person, or organization for purposes related to the education of **children** in **early childhood services programs**, or students in **school** programs that are in addition to the funding provisions of this Manual.
14. A budgeted annual operating deficit for an upcoming school year is acceptable if, and only if, sufficient accumulated operating surplus (AOS) funds are available to cover the planned shortfall without impairing the long-term financial health of the **school jurisdiction**. A **school jurisdiction** failing to submit an acceptable budget will be expected to work with Alberta Education to achieve expected financial results, and may be subject to an inquiry under Section 41 of the *School Act* and to the appointment of an official trustee under Section 42 to conduct the affairs of the **school jurisdiction**.

A **school jurisdiction** incurring an accumulated operating deficit (AOD) is expected to work with Alberta Education to eliminate the accumulated operating deficit in accordance with a **Minister** approved Deficit Elimination Plan and may be subject to an inquiry under Section 41 of the *School Act* and to the appointment of an official trustee under Section 42 to conduct the affairs of the **school jurisdiction**.

## **PRINCIPLES AND PILLARS OF THE RENEWED FUNDING FRAMEWORK**

Public education is a commitment by the people of Alberta to all its children. Public education is a provincial responsibility – one that is best discharged through a funding system that recognizes the right of all Alberta children to an equitable share of the province's resources in a universally accessible education system.

It is the responsibility of government to determine the mandate, goals and standards of the education system, provide the financial resources to achieve the goals, determine the desired level of performance, and report the results of the systems' performance to the public on a regular basis. **School jurisdictions** have been delegated responsibility by the province to deliver education programs to meet the needs of all their students and report on results.

The renewed Funding Framework provides a means to allocate funding to **school jurisdictions** to provide a quality education that reflects the needs of students and society. The foundation for the Framework is based on three pillars: Flexibility, Accountability and Funding. It is a system that distributes funds equitably, provides maximum flexibility to accommodate local decision-making, and makes school boards publicly accountable for the use of resources and the results achieved.

### **PRINCIPLES:**

1. **ACCOUNTABILITY:** The renewed Funding Framework places increased emphasis on assessing and reporting outcomes achieved with the resources provided and focuses on continuous improvement.
2. **CONSISTENCY:** The renewed Funding Framework applies terms and conditions for base funding consistently across the province.
3. **EQUITY:** The renewed Funding Framework distributes available resources in a fair and equitable manner. The funding mechanism recognizes factors beyond the control of **school jurisdictions** that influence relative costs among **school jurisdictions**.
4. **FLEXIBILITY:** The renewed Funding Framework provides **school jurisdictions** with the flexibility required to address local needs and priorities.
5. **PREDICTABILITY/STABILITY:** The renewed Funding Framework enables **school jurisdiction** planning that is consistent with the provincial goals for the basic education system. The framework provides stability for **school jurisdictions** in dealing with changing circumstances and is effective in periods of stability, growth or decline.



6. **SIMPLICITY:** The renewed Funding Framework minimizes the administration processes required to obtain funding and report on expenditures.
7. **TRANSPARENCY:** The renewed Funding Framework is understandable by stakeholders. The rationale for allocation formula(s) is based on objective criteria.
8. **MAINTAIN PROVINCIAL GOALS:** The renewed Funding Framework supports the goals and priorities set by the provincial government for the basic education system and facilitates the piloting and monitoring of improvement initiatives.

## **FLEXIBILITY, ACCOUNTABILITY AND FUNDING PILLARS**

### **FLEXIBILITY PILLAR**

The renewed Funding Framework provides **school jurisdictions** with the flexibility to allocate funds to programs as they choose, in order to meet the educational needs of their students and address local priorities. Although every effort has been made to provide maximum flexibility to **school jurisdictions**, some restrictions will continue to apply in certain funding areas.

#### **LIMITATIONS:**

1. The maximum expenditure for system administration and board governance will continue to be between 4.0 and 6.0% depending on the student enrollment 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.
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). Please see Policy 1.9.2 of the K-12 Education Support Policy, *Regulations and Forms Manual* for more details.
3. Targeted Funding for Provincial Initiatives is allocated for specific priority programs as determined by Alberta Education. For the 2006-2007 school year, these areas are the Alberta Initiative for School Improvement, Student Health Initiative, SuperNet Services, the Small Class Size Initiative, and Children and Youth with Complex Needs. Funding for these initiatives must be spent in the area for which it was provided.
4. Funding for capital needs is allocated to **school jurisdictions** based on priorities and formulas determined by Alberta Education. For the 2006-2007 school year, 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.

**New**

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, Institutional Programs Funding, Regional Educational Consulting Services Funding, Program Unit Funding, Learning Resources Credit, Regional Consortium Funding, and Debt Retirement.

## **ACCOUNTABILITY PILLAR**

**Revised** The Accountability Pillar places increased emphasis on achievement of outcomes, reporting of results on a common basis, and using results for informed decision-making for the purpose of improving programs and student results in subsequent years. The renewed Funding Framework provides flexibility in how funding allocations are used and increases emphasis on local accountability for results, with a focus on improvement.

### **Development of the Accountability Pillar**

**New** The Accountability Pillar is based on the following guiding principles: transparent process, emphasis on achievement, holistic approach to evaluation, on-going collaborative processes, and all **school jurisdictions** can succeed.

### **Accountability Pillar Measures and Categories**

The Accountability Pillar measures are grouped into the seven categories that represent key aspects of education that are important to parents and the public:

**Revised**

- safe and caring schools;
- student learning opportunities;
- student learning achievement (Grade K-9);
- student learning achievement (Grade 10 to 12);
- preparing for lifelong learning, employment and citizenship;
- parental involvement; and
- continuous improvement.

### **Evaluation Methodology**

**New** **School jurisdiction** results are evaluated for each measure on both achievement and improvement which are averaged into an overall evaluation.

The achievement evaluation is based on comparing the current **school jurisdiction** results for each measure against fixed standards that are expected to remain in place for 7-10 years. The achievement standards for each measure are based on **school jurisdiction** three-year average baseline results that yield an evaluation of Very High, High, Intermediate, Low, or Very Low.

The improvement evaluation is based on comparing the current **school jurisdiction** result with the **school jurisdiction's** prior year three-year average result. This yields an

evaluation of Improved Significantly, Improved, Maintained, Declined, Declined Significantly.

Similarly, the overall evaluations of each measure within a category are combined for an evaluation for each category.

Alberta Education calculates the results, three-year averages, measure and category evaluations for the Accountability Pillar measures. Alberta Education then provides this information in a report to each **school jurisdiction** on a standard template twice a year:

- in May for use in preparing their three-year plan; and
- an update in September for inclusion in their Annual Education Results Report (AERR).

**Revised**

**School jurisdictions** are expected to set targets and develop strategies in their three-year plan to address low or declining results, i.e. measures with an overall evaluation of Issue or Concern. School boards continue to be accountable for meeting the education needs of all students, for ensuring that provincial policy, legislation, regulations and standards are met, for taking context into account (local circumstances and student characteristics) and for reporting on allocation and use of funds.

**Revised**

**School jurisdictions** continue to prepare Three-year Education Plans and assess and report on the results annually in their Annual Education Results Reports (AERR), as required by the *Government Accountability Act* and Section 78 of the *School Act*. **School jurisdiction** plans and reports are required to contain the enhanced accountability requirements as specified in the 2006 edition of the *Guide for Education Planning and Results Reporting*.

### **Accountability Framework for Kindergarten to Grade 12 Education**

The Government's Accountability framework, based on the *Government Accountability Act* and centered around the educational needs of students, is an ongoing cycle that focuses on continuous improvement and critical reflection by:

- setting priorities, measuring progress, and using results to develop actions to improve student programs and achievement;
- aligning **school jurisdiction** and provincial goals and outcomes;
- incorporating community output;
- allocating resources to achieve goals and improve results; and communicating with stakeholders (staff, students, **parents**, **school** councils, the public, and Alberta Education) about **school jurisdiction** and **school** directions and results.

Performance Management Cycle for School Authority Accountability

New



Each level in the Accountability Framework plays a key role.

GOVERNMENT OF ALBERTA

- sets provincial direction;
- allocates funds to ministries;
- monitors and reports on progress;
- uses results to plan improvements.

ALBERTA EDUCATION

- Revised**
- sets direction for the education system;
  - prepares three-year education system business plan and guidelines for **school authority** planning and reporting based on provincial direction;
  - assesses and reports annually on results and uses results to set targets, identify priorities for improvement and develop strategies for business plans;
  - evaluates **school jurisdiction** results on Accountability Pillar measures and provides evaluation reports to **school jurisdictions**;
  - allocates funds to school boards;
  - defines basic education, establishes outcomes for the K-12 system, establishes requirements for **school jurisdiction** plan and reports, reviews **school board** plans and results for compliance with provincial requirements, for evidence of improvement, and for identifying implications for provincial level planning.

SCHOOL JURISDICTIONS

- Revised**
- set **school jurisdiction** direction;
  - implement provincial legislation, regulation, policy, standards, programs and initiatives;
  - plan and implement three-year education plans aligned with Ministry direction that include and address the Accountability Pillar evaluation;
  - allocate resources to **schools** and programs;
  - monitors progress;
  - assess and report results, including the Accountability Pillar evaluation, annually to stakeholders;
  - use results to set targets and plan improvements.

SCHOOLS

- Revised**
- set school direction;
  - implement provincial legislation, regulation, policy, standards, programs and initiatives;
  - plan and implement three-year education plans aligned with **school board** and ministry direction;
  - monitor progress;
  - assess and report results annually to their **board** and stakeholders;
  - use results to plan improvements.

Revised

The guidelines and requirements for **school jurisdiction** Three-year Education Plans and Annual Education Results Reports (AERRs) are contained in the *Guide for Education Planning and Results Reporting*. The 2006 edition of the Guide contains the set of accountability measures in relation to the required provincial goals and outcomes, summary information on the evaluation methodology, the implementation of the Accountability Pillar evaluations and action planning to address areas requiring improvement. The Guide also includes updated information on target setting. Charter schools will find planning and reporting information in the *Guide to Charter School Education Planning and Results Reporting*. Accredited –Funded Private schools will find this information in the *Guide for Accredited Private School Planning and Results Reporting*. Both Guides are available online at <http://www.education.gov.ab.ca/educationsystem/planning.asp/>

## FUNDING PILLAR

The renewed Funding Framework is based on a **school jurisdiction** profile model in which factors contributing to significant cost variances among **school jurisdictions** are addressed through allocation formulas. The Framework is designed to ensure funding consistency and equity across the province.

Revised

Funding allocations are distributed in five categories: Base Funding, Additional Funding for Differential Cost Factor, Targeted Funding for Provincial Initiatives, Other Provincial Support, and Capital Funding. **School jurisdictions** have the flexibility and responsibility to allocate Base and Additional Funding for Differential Factors to address local needs. Targeted funding for Provincial Initiatives is allocated for specific priority programs as determined by Alberta Education. These allocations must be spent on the program for which they were provided.

Base Instruction funding is provided on a per student basis for every full-time equivalent (FTE) student from Early Childhood Services to Grade 9. For students in Grades 10 to 12, Basic Instruction funding is provided based on Credit Enrollment Units (CEU's).

Additional Funding for Differential Factors is based on distribution formulas designed to address variable cost factors. Specific identified student populations include:

Revised

- Early Childhood Services children with mild or moderate disabilities and those who are gifted and talented
- **Children and Students with a Severe Disability/Delay,**
- English as a Second Language/Francisation students
- First Nations, Métis, and Inuit students
- The percentage of the student population of a **school jurisdiction** experiencing low Socio-Economic Status (SES).

Funding for **students with severe disabilities** is based on a separate profile for each **school jurisdiction**. 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.

The distribution formulas are also designed to address variable cost factors, such as:

**Revised**

- small schools by necessity
- geographical distance between **school jurisdiction** central office and schools
- year to year enrollment fluctuations
- administration costs for **school jurisdictions** with small enrollments
- increased costs for **schools** located in the north
- cost differences among **school jurisdictions** for purchasing of local goods and services
- variable cost of transporting students in rural, urban and metro **school jurisdictions**
- support for daily physical activity in grade 1-9 schools
- support for Hutterite colony schools
- support for francophone students to have equivalent access to programs.

## **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:

- The Alberta School Foundation Fund (ASFF) provides payments on an equal amount per eligible student \*; and
- The General Revenue Fund (GRF) provides grants authorized by the **Minister**.

\*For an opted out separate school board, the sum of the ASFF payment provided by the province and the tax revenue collected from the board's declared taxpayers would equal the ASFF payment the separate board would otherwise receive if that board participated fully in the ASFF.

### **Alberta School Foundation Fund (ASFF)**

For the purpose of the ASFF the term "school boards" does not include Francophone Regional Authorities or **charter schools**.

The equal amount per **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 **eligible students**. All school boards will receive this dollar amount per **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 **eligible student**, the difference will be paid from the ASFF. If the local requisition is more than the ASFF payment per **eligible student**, the difference must be paid into the ASFF.

## **General Revenue Fund (GRF)**

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 funding of \$20 million from the GRF.

## **Payment of a Funding Allocation**

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 **eligible students** multiplied by the amount per **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 **eligible student** is less than the provincial payment per **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.



## ALLOCATION DESCRIPTION

New

This funding is provided to address the costs associated with providing Early Childhood Services (ECS) instructional programs and services for **funded children** including **children with special needs**. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

## ALLOCATION FORMULA

$$\begin{array}{l} \text{ECS Base} \\ \text{Instruction Allocation} \end{array} = \begin{array}{l} \text{Number of} \\ \text{funded} \\ \text{children} \end{array} \times \begin{array}{l} \text{ECS Base} \\ \text{Instruction Rate} \end{array}$$

## ALLOCATION CRITERIA

Revised

1. Base instruction funding is provided for each **funded child** enrolled in an **ECS program** with a **school jurisdiction** that provides access to at least 475 hours of ECS instruction.
  - a) Some modification to this requirement is allowed for **children with special needs** (mild, moderate, or severe and gifted and talented) who because of their special needs or young age cannot be accommodated by a 475-hour program (e.g. they may require more or fewer hours).
  - b) Some **children with severe special needs**, either because of their disability or young age, may benefit from a combined program involving **centre based** hours and **family-oriented programming** sessions. A combined program must have a minimum of four **family-oriented programming** sessions to qualify for funding. See definition of **family-oriented programming** in the Glossary of Terms for more details.
2. 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 child referred to in Section 30(1)(a) of the *School Act* is not a resident or non-resident student of a **board**, therefore, **school jurisdictions** shall not use the residency or non-residency of the **parent** of a child in a district or **division** to:
  - a) deny a funded child access to the program; or
  - b) differentiate fees charged for the program.

4. For the purpose of claiming ECS Base Instruction funding, the ECS count must not include any **funded child** counted by another **ECS operator** for funding purposes in the school year. A **funded child** can only be claimed for funding by one **ECS operator** per year. The **school jurisdiction** claiming the **funded child** is responsible for ensuring the **funded child** was not claimed by another **ECS operator** in the current school year.

However, if a **funded child** is attending more than one **ECS program** on the **count date** and a resolution cannot be reached as to which **ECS operator** should count the **funded child**, then the ECS Base Instruction funding will be split accordingly. For example, a **funded child** may be enrolled in a morning program with one **ECS operator** and also enrolled in an afternoon program with another **ECS operator**.

Neither operator may be aware of the duplicate enrollment until Alberta Education has identified the enrollment conflict. If at that time, a resolution cannot be reached as to which **ECS operator** should count the **funded child** then the ECS Base Instruction funding is split accordingly.

5. **School jurisdictions** are eligible for one year of ECS Base Instruction funding for regular ECS **funded children**. **Funded children** must be at least 4 years 6 months of age and less than 6 years of age on September 1. Alberta Education will not provide more than one year of funding for a regular ECS **funded child**. Note: the minimum age may vary depending on the school entrance age policy of the **school jurisdiction** the **funded child** will enter.

- Revised
6. A **funded child with a disability/delay** may qualify for more than one year of funding. See definition of **funded child** in the Glossary of Terms. Note that an ECS **funded child** may not receive more than 3 years of ECS funding in total.

7. Alberta Education provides funding for a basic 475 hour **ECS program** which includes support for instructional salaries and benefits, learning resources, furnishings and equipment. **School jurisdictions** may not charge a fee for services provided within the basic 475-hour program.
8. A **school jurisdiction** may 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.
9. **School jurisdictions** that offer an **ECS program** with more than 475 hours may charge a reasonable fee to cover the cost of the additional program hours.
10. Individuals aged 5 years and 6 months or older, but less than 6 years of age on September 1 are counted as **funded students** (rather than as **funded children**) if they are eligible to enter Grade 1 under the school entrance age policy of the **school jurisdiction**. The exceptions to this are:

- a) if the **funded child** has spent less than the number of years in the program for which he/she is eligible for funding, i.e., received less than three years of program unit funding; or
- b) if the **funded child** has not enrolled in an **ECS program** prior to this age; or
- c) if the **funded child** has been identified as **developmentally immature** (code 10). This child is not eligible for special needs funding and should not have been identified as special needs in prior years.

In these circumstances, when in the opinion of the **school jurisdiction** and the **parent**, an **ECS program** is considered the most appropriate program; the individual is counted as a **funded child** under ECS.

11. Individuals aged 6 years or older, but less than 7 years of age on September 1 are counted as **funded students** except individuals who are in an **ECS program** and are:
- a) **developmentally immature** (Code 10); or
  - b) entering an **ECS program** for the first time.

These individuals (a or b) are counted as **funded children**.

12. An individual who is eligible to proceed to Grade 1, but who has been identified as **developmentally immature** and whose program plan involves both ECS and Grade 1 instruction may be counted either as a **funded child** or as a **funded student**.
13. Individuals aged 6 to 7 years old, who require another year of ECS and who have been assessed as having special needs (mild, moderate, severe or gifted and talented) must be counted as **funded students**.
14. Under no circumstances can an individual be counted as both a **funded student** and as a **funded child** in the same school year.
15. A **school jurisdiction** that receives provincial funding must ensure that **parents** can access a basic **ECS program** of 475 hours for their **funded children** without any charge for instruction.
16. When a **funded child** (not a special needs child) lives in a remote area and where there is no ECS **school** program within a reasonable transportation **distance**, the **school jurisdiction** may provide an **ECS home program** so that the child may have the opportunity to experience an **ECS 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 ECS programming**.

Updated

**DOCUMENTATION AND REPORTING REQUIREMENTS**

1. Funding for ECS Base Instruction is made on the basis of **funded child** registration information submitted to the Information Services Branch.
2. For **ECS programs** beginning in September, the **count date** enrollment information must be submitted by October 5 to the Information Services Branch.
3. For **ECS programs** beginning after the **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 weeks of that day to the Information Services Branch.

**Updated**

**ECS programs** beginning after the **count date** must also submit a letter to the Director of the School Finance Branch indicating that they are a late starting program, what the start date of the program is, 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.

4. Adjustments to enrollment data:
  - a) if an adjustment is required to the enrollment data reported to the Information Services Branch, **school jurisdictions** must ensure that changes are made to their modification file.
  - b) after receiving your first Revenue Allocation and Credit Enrollment Reporting System (RACERS) data, any modification required can be submitted using the "Add, Modify, Delete" form in the Funding Event Systems (FES) or using the paper form (Form 06AE1.2c), by the April 30 deadline.
5. An **ECS home program** must be approved by the Director of the Governance Support Branch on an individual child basis.

**ADDITIONAL INFORMATION**

1. Refer to Part 8, Section 8.7, Enrollment Counts and Conflicts, for additional information.

**FEES AND DEDUCTIONS**Portable Classroom Rental Fee:

Alberta Education will deduct from the funding amount due to a **school jurisdiction** a rental fee of \$100 a month (plus GST) for each ECS portable classroom under an existing lease agreement with Alberta Infrastructure. New requests for portable classrooms will not be considered.

Monthly fee deductions will be made for programs that operate for partial months if the program begins before the 15<sup>th</sup> day of the month or ends on or after the 15<sup>th</sup> day of the month.

Subject to Ministerial approval, a **school jurisdiction** will be given the opportunity to purchase a portable that is under an existing lease agreement with Alberta Infrastructure and is in good repair. Alberta Infrastructure is responsible for the disposition of a portable if it is no longer required or if the cost of maintenance and repair can no longer be justified.

**School jurisdictions** will need to apply under the current Capital Funding Plan for space required to replace the ECS portable.

## REFERENCES

Kindergarten Program Statement Revised September 2005

Early Childhood Services Policy 1.1.3

Early Childhood Services Regulation AR 31/2002

School Capital Manual, Alberta Infrastructure, April 2002

Program Unit Funding: A Handbook for ECS Operators

## **ALLOCATION DESCRIPTION**

**New**

This funding is provided to address the costs associated with providing instructional programs and services for **funded students** including **students with special needs** and system administration. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

## **ALLOCATION FORMULA**

**Revised**

1. Up to 60 CEUs per school year (September to August), including CEUs completed in Knowledge and Employability (K&E) courses and regular programs, will be funded for each Grade 10 to 12 **funded student**.

- a) Base Instruction – Grades 1-12:

$$\begin{aligned}
 &\text{Base Instruction Allocation} = \left[ \text{Number of } \mathbf{\text{funded students}} \text{ in Gr. 1-9} \times \text{Base Instruction Rate} \right] \\
 &+ \left[ \text{Number of CEUs completed by } \mathbf{\text{funded students}} \text{ in Gr. 10-12 (includes regular day, weekend, evening summer courses and K\&E courses at 8/5)} \times \text{CEU Rate} \right] \\
 &+ \left[ \text{Number of } \mathbf{\text{students with special needs}} \text{ in Gr. 10-12} \times \left\{ 35 \text{ CEUs} \times \text{CEU Rate} \right\} \right]
 \end{aligned}$$

## **ALLOCATION CRITERIA**

1. **School jurisdictions** 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.

2. Base instruction funds are provided to a **school jurisdiction** for each **funded student** in Grades 1 to 12. Included in this funding are funds to support programming for students with mild or moderate disabilities and students who are gifted and talented.
3. All individuals who are at least 6 years of age but less than 20 years old on September 1 may be eligible for this funding. See definition of **funded student** in the Glossary of Terms.
4. All individuals age 5 years and 6 months or older, but less than 6 years of age on September 1 are counted as **funded students** (rather than as **funded children**) if they are eligible to enter Grade 1 under the **school** entrance age policy of a **school jurisdiction**. The exceptions are:
  - a) if the **funded child** has spent less than the number of years in the program for which he/she is eligible for funding, i.e., received less than three years of PUF; or
  - b) if the **funded child** has not enrolled in an **ECS program** prior to this age; or
  - c) if the **funded child** has been identified as **developmentally immature** (code 10).

In these circumstances, when in the opinion of the **school jurisdiction** and the **parent** an **ECS program** is considered the most appropriate program, the individual is counted as a **funded child** under ECS.

5. Under no circumstances can an individual be counted as both a **funded student** and as a **funded child** in the same school year.
6. An individual who is eligible to proceed to Grade 1 and who is less than 7 years old on September 1 who has been assessed as **developmentally immature**, and whose program plan involves both ECS and Grade 1 instruction, may be counted either as a **funded child** or as a **funded student**.
7. High school courses taken by Grade 9 students in the summer program, prior to the start of their Grade 10 fall term, will not be included in the calculation of the 60 CEU annual limit for funding outlined in Allocation Criteria #9 of this section.
8. **High School Course Completions for Students in Grades 10 to 12**

Base Instruction funding for senior high school students is based on the principle that instructional services are provided and courses are completed. Instructional services must be timetabled for both students and teachers and ensure that students have access to at least 25 hours of instruction per high school credit.

The Board Chairman, Superintendent and Secretary-Treasurer of the **school jurisdiction** are required to sign the following Declaration of Management on an annual basis:

“As the Superintendent and Secretary-Treasurer, we certify that the Credit Enrollment Units (CEUs) submitted by the jurisdiction are complete, accurate and do not contravene, either directly or indirectly, the funding requirements for CEU funding as outlined in Alberta Education’s *Funding Manual for School Authorities*. As the Board Chairman, Superintendent, and Secretary-Treasurer, we support the education practices of the jurisdiction and affirm that the policies of the jurisdiction are in alignment with the intent of education funding to provide a quality education that best meets the needs of students.”

This declaration will be included in RACERS and must be printed, signed and submitted to School Finance. The Declaration of Management form can also be found in the Forms section of this Manual as Form 06AE1.2d. The declaration will be considered part of the accountability of **school boards** in reporting CEUs for funding and programming purposes.

High school courses delivered to students and claimed for funding must meet the conditions in this Funding Manual, and the Guide to Education ECS to Grade 12 and must also comply with all other Alberta Education policies, regulations and legislation. See the General Conditions that Apply to Funding in the Introduction section of this Manual. Among the conditions that all courses must meet are the following:

- Revised**
- a) 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% or greater in the course; or
    - ii) a student has earned a final mark of 25% or greater but less than 50% in the course, and has attended at least 50% of the classes in the course or has worked on and been assessed on at least 50% 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 jurisdictions** shall only claim one course for funding.

For diploma examination courses condition 8(a) only applies to the school-awarded portion of the mark.



**Revised**

- b) for regular courses submitted as complete (COM) or withdrawn (WDR) and delivered to students on-line or by distance learning the attendance funding criteria may not apply. Funding will be provided if the student has:
- i) earned a final mark of 50% or greater in the course, or
  - ii) earned a final mark of 25% or greater, but less than 50% in the course and has worked on and been assessed on at least 50% of the course content.
- c) for all regular courses (non-CTS), **schools** must maintain course outlines, detailed assessment records of student work in the course, records of student withdrawal, student attendance, and final marks. Also see Procedures, Documentation and Reporting in this section for more details.

**Revised**

- d) a one credit CTS course submitted as completed (COM), incomplete (INC) or withdrawn (WDR) is considered completed for funding purposes when a student has worked on and been assessed on at least 50% of the course content.
- e) funding will not be provided for a CTS course if the prerequisite(s) was not completed in the same term or a prior term.
- f) for all CTS courses, **schools** must maintain course outlines and detailed assessment records of student work in the course, records of student withdrawal and final marks. Also see Procedures, Documentation and Reporting in this section for more details.
- g) Base Instruction funding will be provided for **funded students** in Grades 10 to 12 who attend **school** in another province with which the **school jurisdiction** has an agreement under Section 62 (2)(a)(iii) of the *School Act*.
- h) students are not restricted in the number of credits they can take in a school year.
- i) Course Completion Status Codes:

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

- a “complete” (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.
- a “withdrawal” (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.

- an “incomplete” (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 Program of Studies. An incomplete status has no associated mark(s). A course completion status of (INC) may only be used for CTS courses.
- when a course is reported as eligible for funding, all funding conditions must be met and all supporting documentation maintained, regardless of the completion status reported.

## 9. Funding for Funded Students in Grades 10 to 12

Base Instruction funding for students in Grades 10 to 12 is based on the following:

Revised

- a) funding is provided on a credit enrollment unit (CEU) basis for senior high school courses completed during regular daytime hours, weekends, evening and the summer months, with a maximum of 60 CEUs funded per student per school year (September to August). For Senior high school courses with a credit value of 3, funding is based on 2.5 CEUs. For courses with a credit value of 5, funding is based on 5 CEUs. For courses with a credit value of 1, funding is based on 1 CEU;
- 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:
  - 80 hours for a five credit course; or
  - 48 hours for a three credit course;
 (Work Experience, RAP, and Special Projects courses are exceptions to these rules - see the Guide to Education for more details)
- c) funding is provided for Alberta Distance Learning (ADL) courses paid by a **school jurisdiction** for students whose marks are reported by the ADLC;
- d) funding is provided for RAP, Work Experience, and other credit courses involving substantial off-campus instruction;
- e) funding is provided for repeated courses as long as instruction is provided in accordance with the same requirements as the first time the course was taken. Funding is not provided for students repeating courses where they previously received a mark of 100% in the course;
- f) funding is provided for high school credit courses completed that may not otherwise be counted towards a high school diploma (e.g. ESL 1125);
- g) 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 (see Guide to Education –section on Locally Developed/Acquired and Authorized Junior/Senior High Optional Courses).

**New**

School authorities offering locally developed senior high school complementary courses must be granted the use of a course code by Alberta Education to receive the relevant Credit Enrollment Unit (CEU) funding. Course codes are provided to school authorities, valid for a specified term, for each senior high locally developed course that has been locally authorized through a board motion and meets policy requirements and submission deadlines.

School authorities shall forward all completed authorizations and course outlines of credit courses (including second language courses) to the Director, Curriculum 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.

For additional information, please refer to *Policy 1.2.1 – Locally Developed/Acquired and Authorized Junior and Senior High School Complementary Courses* at [www.education.gov.ab.ca/EducationGuide/polplan/polregs/121.asp](http://www.education.gov.ab.ca/EducationGuide/polplan/polregs/121.asp)

- h) funding is provided for credit-bearing religious education courses, where instruction is provided;
- i) funding is provided for credits in Special Projects 10 – 20 – 30 courses;
- j) funding is provided for students in senior high school who take a junior high course for 125 hours; the equivalent of 5 CEUs will be funded for each course completed (Form 06AE1.2a);
- k) funding based on 35 CEUs is provided for senior high school **students with special needs** (identified with the 500 grants code). Additional funding based on CEUs will be provided for course credits completed in the summer months by **students with special needs**;

**Revised  
Updated**

- l) 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 CEU value;
- m) students registered on the **count date** 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 CEUs per student per semester of ESL courses taken. No additional funding is provided for other courses completed during these semesters. Students taking ESL courses or non-ESL courses during the summer term will be funded on a CEU basis;
- n) funding is provided for credits granted through **challenge assessments** at 20% of the CEU value for the course(s) challenged;

- Revised** o) when a student takes two French as a Second Language courses by instruction in the same term only one course will be funded, unless 25 hours of instruction per credit is provided;
- p) funding based on 35 CEUs is provided for senior high school students enrolled in Institutional programs (code 550) on the **count date**;
- New** q) funding based on 35 CEUs is provided for **high school refugee students** (code 640). **High school refugee students** enrolled in Home Education programs, **Blended programs**, **Outreach programs** or **On-Line programs** are not eligible for this funding.
- r) 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;
- s) Base Instruction funding is provided for each Alberta **funded student** who is on a **reciprocal exchange program** approved by Alberta Education; and
- t) funding is provided for Alberta **funded students** enrolled with a Lloydminster school division high school on the **count date**.

#### 10. **CEU Funding Recovery Schedule**

- a) A 10% funding recovery will be applied for the following Access to Instructional Hours violations:
- i) Courses where access to instruction is found to be less than 25 hours per high school credit (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 enrollments 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.
  - iv) Where a high school student does not have access to at least 1000 hours of instruction.
- b) A 100% funding recovery will be applied when:
- i) Courses taught did not follow the Program of Studies.
  - ii) A school that has been assessed a penalty previously, continues to be non-compliant.
  - iii) Courses have both access to instruction and Program of Studies contraventions.
- c) A 75% funding recovery will be applied when:
- i) Special Projects do not meet the programming requirements set out in the Guide to Education.

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**11. Payment Not Provided for Funded Students in Grades 10 to 12**

**Updated** Base Instruction funding for students in Grades 10 to 12 is not provided for:

- a) waived or retroactive credits;
- b) maturity credits;
- c) high school credits taken by junior high school students (except for summer courses, if the student taking the course is eligible to enter Grade 10 in the next school year). This includes CTS courses completed by students in junior high school and Heritage Language high school credit courses;
- d) post-secondary courses, including those that have been approved as locally developed courses;
- e) credits granted through evaluation of out-of-province courses; or
- f) extra-curricular, co-curricular, or community-based activities such as competing on an athletic team.

**Updated** 12. When a student meets the criteria of a **funded student** and is attending a **school** in Canada that is providing both an academic and an **activity program**, and a comparable program is not available in Alberta, and the **student** has been selected by **audition** or other substantive selection method to be part of the program, he or she may be funded depending on individual circumstances. The **resident board** is required to have an approved tuition agreement under Section 62(2) of the *School Act*. The tuition agreement must be approved by the **Minister** and should be submitted to the Legislative Services Branch. Once a tuition agreement is approved, students are eligible for funding under this section only.

13. The following applies for students with mild a or moderate disability or students who are gifted and talented who are attending a **Designated Special Education Private School (DSEPS)**:

- a) The **DSEPS** must advise **parents** of the need to discuss their child's mild or moderate disability, or gifted and talented special needs eligibility and programming options with their **resident board** prior to enrollment in the **DSEPS**. The **resident board** official must retain a record of the discussion with the **parent(s)** to document the **parent** consultation.

**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:

- i) a **school** official of the **resident board** (e.g. the Principal or Special Education Coordinator) must inform the **parent(s)** that their child has been assessed as having a mild or moderate disability or gifted and talented special need;

- ii) the **resident board** must offer and explain to the **parent** what type of special education programming the **resident board** can provide for the student;
- iii) if, after being advised of the 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 their child is leaving the **school** to go to a **DSEPS**.

When a **student with a mild or moderate disability** or who is gifted and talented is enrolled in a **DSEPS**, funding of \$9,727 per student will be paid directly to the **DSEPS**, with no cost to the **resident board** if enrollment occurs on or before the **count date**. These students must be coded by the **DSEPS** using the codes 110 and 500 with the applicable code 50s (mild/moderate) or code 80 (gifted and talented).

If a **parent** enrolls their child in a **DSEPS** without consulting with the **resident board** on the child's eligibility for special education programming, the **DSEPS** will only be eligible for funding of \$6,058 (rather than the funding of \$9,727) for these students. These students must be coded by the **DSEPS** using code 500 with the applicable 50's code (mild/moderate), or code 80 (gifted and talented). The code 110 cannot be used for these students.

The **DSEPS** will report all students enrolled on the **count date** in their **schools** to the Information Services Branch. **DSEPS** will also notify **school jurisdictions**, in writing, of their **resident students** who registered at the **DSEPS**. The **DSEPS** will also forward a copy of this notification list by December 15 to the Director of School Finance, Alberta Education, confirming which students' parents discussed placement options with their resident **school jurisdiction** and which did not. This confirmation will determine the **DSEPS** Base instruction funding rate paid by Alberta Education.

- b) For **students with a mild or moderate disability** or students who are gifted and talented enrolled with a **school jurisdiction** on the **count date** who transfer to a **DSEPS** after the **count date** in the current school year (or vice versa), funding will no longer be required to be transferred by the **school jurisdiction** or by the **DSEPS** on a pro-rated basis.
- c) No pro-rated Base instruction funding will be provided by Alberta Education to the **DSEPS** for students enrolled after the **count date**.
- d) A **school jurisdiction** that directs a student to a **DSEPS** will pay all program costs that are not covered by funding provided by Alberta Education to the **DSEPS**.

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**DOCUMENTATION AND REPORTING REQUIREMENTS**

1. Base instruction funding is based on:
  - a) Student registration enrollments in Grades 1 to 9 as of the **count date** that are submitted to the Information Services Branch by October 5;
  - b) Course completion information for students in Grades 10 to 12 as follows:
    - i) Student Information System for specific enrollment; and
    - ii) Student Records System/Course Information Database System (CIDS) for course marks;

**Note:** **schools** are required to maintain and retain 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.

  - c) Student information on Form 06AE1.2b for students attending First Nations **schools**.
  - d) Student information on Form 06AE1.2a for senior high students taking junior high courses.
  - e) See Part 8, Section 8.7 for information on Enrollment Counts and Conflicts.
2. Adjustments to enrollment data:
  - a) If an adjustment is required to the enrollment data reported to the Information Services Branch on the **count date**, **school jurisdictions** must ensure that changes are made to their modification file.
  - b) After receiving the first RACERS data set, any modification required can be submitted using the "Add, Modify, Delete" form in the Funding Event System (FES) or using the paper form (Form 06AE1.2c), by the April 30 deadline.
3. Base Instruction funding for **funded students** attending **school** in another province will be based on:
  - a) a copy of the agreement under Section 62(2) of the *School Act*; and
  - b) a letter indicating the student's name, birth date and grade and Alberta Student Number (ASN).
4. Base Instruction funding for **funded students** that are attending a First Nations **school** will be based on:
  - a) a copy of an agreement under Section 62(2) of the *School Act*; and
  - b) Form 06AE1.2b

5. Funding for **students with special needs** who are directed by the resident **school jurisdiction** to another **school jurisdiction** under an **educational services agreement** will be provided as follows:

- a) The providing/registering **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 count date** headcount and all related funding is provided by Alberta Education to the resident **school jurisdiction**. This ensures that the resident board maintains responsibility for the student. No funding is provided by Alberta Education to the providing/registering **school jurisdiction**. Payment for a student's program is the responsibility of the resident **school jurisdiction**.
- c) For **students with severe disabilities** with a 140 code, the resident **school jurisdiction's** severe disabilities profile number will not be adjusted; therefore the resident **school jurisdiction's** severe disabilities funding will remain unchanged.
- d) The 140 code cannot be used with students coded as 110, 145, 600, or 610.
- e) The 140 code can only be used by **school jurisdictions**. The 140 code cannot be used by **private schools, Designated Special Education Private Schools (DSEPS)** or **private ECS operators**.
- f) RACERS data sets will provide a report of **resident students** who have been coded with 140 by another **school jurisdiction**.

**New** 6. To receive 35 CEUs of Base Instruction funding for **high school refugee students** (code 640), **school jurisdictions** must:

**Updated**

- a) have one of the following documents on file from Citizenship and Immigration Canada:
  - Notice to Appear
  - Refugee Protection Claimant Document
  - Notice of Decision
  - Immigration Visa and Record of Landing indicating status as Convention Refugee
  - Confirmation of Permanent Resident indicating status as Convention Refugee



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## ADDITIONAL INFORMATION

### FEES AND DEDUCTIONS

1. Access Copyright (formerly Cancopy):

Alberta Education has an agreement with the Canadian Copyright Licensing Agency (Access Copyright). Most **schools** in the province are covered in the license. Alberta Education makes the payment for the license on behalf of all participating **school jurisdictions** and **charter schools**. The costs of the license, plus GST, is recovered from **school jurisdictions** and **charter schools** on a full-time equivalent student basis.

2. EduLink:

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

The College of Alberta School Superintendents (CASS) and Association of School Business Officials of Alberta (ASBOA) have agreed their membership will provide the necessary funds to support EduLink for a three-year period – from September 2005 to August 2008. Alberta Education will deduct approximately 35¢ plus GST per **funded student** and **funded child** on behalf of all participating **school jurisdictions** and **charter schools**. This deduction will be made in September and based on the prior year frozen **funded student** and **funded child** count. The deduction will be reflected on the September funding statement. It is up to the individual **school jurisdictions** and **charter schools** to apply for any GST rebate from the Government of Canada.

**Revised**

Alberta Education will forward the maintenance fee of \$200,000 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.

3. 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 **board**.

**New**

If a 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.

## **ALLOCATION DESCRIPTION**

**New**

This funding, which is in addition to Base Instruction funding, is provided to address the higher costs associated with operating **outreach programs**. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

## **ALLOCATION FORMULA**

**Revised**

$$\begin{array}{ccccc} \text{Outreach Base} & & \text{Number of} & & \text{Outreach Base} \\ \text{Funding} & & \text{Outreach programs} & & \text{Funding rate} \\ & = & \text{in the } \textbf{school} & \times & \\ & & \textbf{jurisdiction} & & \end{array}$$

## **ALLOCATION CRITERIA**

1. Outreach Base Funding is subject to approval of the outreach program.

## **DOCUMENTATION AND REPORTING REQUIREMENTS**

**Revised**

1. Applications for approval to begin new **outreach programs** in the following school year must be submitted by March 31 of the prior year to your Zone Services Branch Director using Form 06AE1.3. Alberta Education may not approve all applications.
2. 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.

**ADDITIONAL INFORMATION**

1. Students in an **outreach program** may also complete courses in other programs or **schools**.
2. The *Outreach Programs Handbook* provides assistance in developing an outreach application.

**REFERENCES**

Outreach Program Policy 1.1.4

Standards for Special Education, Amended June 2004

Guide to Education: ECS to Grade 12, 2005

Alberta Education Programs of Study

Outreach Programs Handbook

**ALLOCATION DESCRIPTION**

**New** This funding is provided to address the costs associated with providing instructional programs, services and resource materials for **home education students**.

**ALLOCATION FORMULA**

**1. Home Education:**

$$\begin{array}{l} \text{Home Education} \\ \text{Allocation} \end{array} = \begin{array}{l} \text{Number of Home} \\ \text{Education students} \\ \text{Gr. 1-12} \end{array} \times \begin{array}{l} \text{Home Education} \\ \text{Rate} \end{array}$$

**PLUS,**

**Revised**

- a) 50% of the eligible Alberta Distance Learning (ADL) course costs for **home education students** in Grades 7 to 12 enrolled at the ADLC, -up to a maximum equivalent to the Home Education instruction funding rate; and
- b) the eligible ADL course costs for **home education students** in Grades 1 to 6 taking a full course load of ADL courses at the ADLC, which exceed the required 50% Home Education instruction funding that the **associate board** provides to the home education **parents** for the purchase of courses and instructional materials.

**2. Blended Program** (as defined in the Glossary of Terms) for Grades 1 – 12 students:

$$\begin{array}{l} \text{Blended Program} \\ \text{Allocation for each} \\ \text{Funded Student} \end{array} = \left\{ \begin{array}{l} \text{Percentage of the} \\ \text{Home Education} \\ \text{Program} \end{array} \right\} \times \begin{array}{l} \text{Home Education} \\ \text{Rate} \end{array}$$

**Revised**

**PLUS:**

$$\begin{array}{l} \text{The percentage of} \\ \text{the School Program} \end{array} \times \begin{array}{l} \text{Base Instruction} \\ \text{Rate} \end{array}$$

**PLUS:**

50% of the eligible ADL course costs up to a maximum of the student's pro-rated Home Education funding amount.

See ADDITIONAL INFORMATION in this section for calculation examples of the Blended Program allocation.

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**ALLOCATION CRITERIA**

1. Instruction funding may be provided to the **associate board** for **home education students** the **board** has agreed to supervise and provide with education resources. 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*.
- Revised 2. An **associate board** must offer to the **parents** of a **home education student** not less than 50% of the Home Education instruction funding for the purchase of instructional materials. If the **home education student** is enrolled by the **associate board** in ADL courses at the ADLC with the **parents'** permission, the board may use some or all of the parents 50% funding to pay for the cost of these courses and required instructional materials.
- Revised 3. Additional funding may be provided to the **associate board**, for eligible course costs for **home education students** in Grades 7 to 12 enrolled by the **associate board** in Alberta Distance Learning (ADL) courses at the Alberta Distance Learning Centre (ADLC). The funding provides for 50% of the cost of the ADLC's course tuition fees, lesson materials and resources (net of any refund) up to a maximum equivalent to the Home Education instructional funding amount. This funding may be claimed on Form 06AE1.4a.
- Revised 4. Additional funding may be provided to the **associate board** for eligible course costs for **home education students** in Grades 1 to 6 taking a full course load of ADL courses through the ADLC. The funding provides for the cost of ADLC course tuition fees, lesson materials and resources (net of any refund) that is in excess of the required 50% Home Education instruction funding allocated for the purchase of courses and instructional materials -whether the funding was retained by the **associate board** or provided to the **parents** (see Allocation Criteria # 9). This funding may be claimed on Form 06AE1.4b.
- Revised 5. Students enrolled in Grades 1 to 9 who are participating in a **blended program**, and accessing at least 50% of their education courses at **school**, may be claimed as **funded students** by the **associate board**. However, Alberta Education will prorate the funding provided based on the percentage of the student's courses taken at **school**, and the percentage of the courses taken at home.
- Revised 6. Students enrolled in Grades 10 to 12 who are participating in a **blended program** and accessing at least 20% of their education courses at **school** may be claimed as **funded students** by the **associate board**. However, Alberta Education will prorate the funding provided based on the percentage of the student's courses taken at home and the percentage of the student's courses taken at **school**.
- Revised 7. In accordance with Section 8 of the *Home Education Regulation*, an **associate board** shall provide to a **parent** of a student enrolled in a **blended program**, 50% of the Home Education instruction funding that is based on the percentage of the home education program.

- Revised**
8. When a **home education student** in grades 7 to 12, who is taking ADL courses through the ADLC, moves from one **associate board** to another after the **count date**, and the receiving **associate board** also enrolls the student in ADL courses through the ADLC; Alberta Education will pay 50% of the eligible ADL course costs combined for both **associate boards** –up to a maximum equivalent to the Home Education funding amount. This funding may be claimed on Form, 06AE1.4a.
  9. **Home education students** and their **parents** must be living in Alberta on the **count date** of the current school year.

## DOCUMENTATION AND REPORTING REQUIREMENTS

- Revised**
1. Home Education funding is based on:
    - a) student registration information in Grades 1 to 12 as of the **count date** that is reported to the Information Services Branch by October 5; and
    - b) the application for reimbursement of ADL course costs for **home education students** in Grades 9 to 12 enrolled in courses at the ADLC (Form 06AE1.4a);
    - 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 06AE1.4b).
  2. **Associate boards** shall have home education policies in place that indicate which Programs of Study and instructional materials will be considered for reimbursement and the amount of reimbursement for students in **blended programs**.
  3. **Associate boards** must conduct at least two evaluations annually of their **home education students'** progress.

## ADDITIONAL INFORMATION

- Revised**
1. Funding for an **associate board** for each student enrolled in a **blended program** on the **count date** is the sum of the calculations in (a),(b) and (c) :
    - a) the percentage of the student's home education program multiplied by the Home Education funding rate; plus
    - b) the percentage of the student's **school** provided program multiplied by the Base Instruction funding rate for **associate boards**; plus
    - c) plus 50% of eligible ADL costs up to a maximum equivalent to the student's Home Education instruction funding amount.

Example 1 -Blended Program for a student in grades 1-12:

**Revised** A student in a home education program for 40% of the time enrolled in courses at the ADLC and in a regular **school** program for 60% of the time would be funded as follows:

Home Education funding amount	40%	X	\$1,323	=	\$529.20
Plus ADLC course costs up to a maximum of the pro-rated home education funding amount	40%	X	\$1,323	=	\$529.20
Plus the Base Instruction funding amount (for the applicable grade)	60%	X	\$5,291	=	<u>\$3,174.60</u>
<b>Total</b>					<b><u>\$4,233.00</u></b>

Example 2: Blended Program for a senior high student:

A senior high student in a home education program for 70% of the time and in a regular **school** program for 30% of the time would be funded as follows:

Home education rate	70%	X	\$1,323	=	\$926.10
Regular <b>school</b> rate (for the applicable grade)	30%	X	\$5,291	=	<u>\$1,587.30</u>
<b>Total</b>					<b><u>\$2,513.40</u></b>

## REFERENCES

Home Education Policy 1.1.2

Home Education Regulation AR 126/1999

## **ALLOCATION DESCRIPTION**

**New**

This funding, which is in addition to ECS Base Instruction funding, is provided to address the costs associated with providing the appropriate services and supports for **children with a mild or moderate disability/delay** and **funded children** who are gifted and talented. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

## **ALLOCATION FORMULA**

$$\begin{array}{l} \text{ECS Mild/Moderate and} \\ \text{Gifted and Talented} \\ \text{Allocation} \end{array} = \begin{array}{l} \text{Number of children with a} \\ \text{mild or moderate} \\ \text{disability/delay and funded} \\ \text{children who are gifted and} \\ \text{talented} \end{array} \times \begin{array}{l} \text{Mild/Moderate and} \\ \text{Gifted and Talented} \\ \text{Rate} \end{array}$$

## **ALLOCATION CRITERIA**

1. Funding is paid to a **school jurisdiction** to meet the educational needs of **children with a mild or moderate disability/delay** and **funded children** who are gifted and talented, for a maximum of two years. **Funded children** must be at least 3 years 6 months of age on September 1 and less than 6 years of age on September 1.
2. A **child with a mild or moderate disability/delay** or a **funded child** who is gifted and talented who is at least 5 years 6 months of age and less than 6 years of age, and who is eligible for Grade 1 (under the **school** entrance age policy), may be eligible for mild/moderate ECS funding if the **school jurisdiction** and the **parent** agree that an **ECS program** is the most appropriate program (subject to the maximum of two years funding.) See the definition of **funded child** in the Glossary of Terms.

## **DOCUMENTATION AND REPORTING REQUIREMENTS**

1. Special needs funding is based upon **funded child** registration information as of the **count date** and submitted to the Information Services Branch by October 5. **Children with a mild or moderate disability/delay** must be coded with a 30 code and **funded children** who are gifted and talented must be coded with an 80 code. **School jurisdictions** must also include the grants code 500 on the electronic SIS registration file or Alberta Education Student Registration Form to receive this funding.



2. For **funded children** who were enrolled in the program on the **count date** but were assessed as having a mild or moderate disability/delay or identified as gifted and talented after the **count date**, an “Add, Modify, Delete Form” (Form 06AE1.2c) must be completed and submitted to School Finance or the data may be submitted on-line using the Funding Event System (FES). The data should be submitted before April 30 to receive this funding.
3. Recent assessment documentation to support each **funded child’s** designation and identification as a **child with a mild or moderate disability/delay** or a **funded child** who is gifted and talented must be kept on file by the **school jurisdiction**.
4. An **Individualized Program Plan (IPP)** for each **child with a mild or moderate disability/delay** or a **funded child** who is gifted or talented is to be developed, implemented, regularly reviewed and kept on file by the **school jurisdiction**.

## REFERENCES

*Early Childhood Services Policy 1.1.3*

*Guide to Education: ECS – Grade 12*

**New** **ALLOCATION DESCRIPTION**

**Updated**

This funding, which is in addition to ECS Base Instruction funding, is provided to address the costs associated with providing the appropriate educational services and supports for **children with a severe disability/delay**.

**ALLOCATION FORMULA**

1. The funding amount paid will be the lesser of:

- a) the approved budget amount,
- b) the program unit ceiling amount, and
- c) the actual cost.

Note: on the Program Unit Funding (PUF) application, the amount approved for each (PUF) unit will be the lesser of the budget amount or the ceiling amount.

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

i) **Centre-based programming**

$$\text{Ceiling Amount} = \frac{\text{Number of Centre Hours (max 800)}}{800 \text{ hours}} \times \text{Ceiling Rate for one program unit funded child}$$

ii) Combined program: **centre-based** and **family-oriented programming sessions**

$$\text{Ceiling Amount} = \left\{ \frac{\text{Number of Centre Hours (max 800)}}{800 \text{ hours}} + \frac{\text{Number of Sessions (max 36)}}{36 \text{ Sessions}} \right\} \times \text{Ceiling Rate for one program unit funded child}$$

The maximum payable under this calculation is the ceiling amount for one program unit **funded child**.

- b) Calculation of the ceiling amount for a program unit with more than one program unit **funded child (clustering)**. See definition of **clustering** in the Glossary of Terms.

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 for this program unit **funded child** as follows:

$$\text{Ceiling Amount} = \left\{ \frac{\text{Number of Centre Hours (max 800)}}{800 \text{ hours}} + \frac{\text{Number of Sessions (max 36)}}{36 \text{ Sessions}} \right\} \times \text{Ceiling Rate for one program unit funded Child}$$

**PLUS:** for each additional program unit **funded child** in the unit, as follows:

$$\left\{ \frac{\text{Number of Centre Hours (max 800)}}{800 \text{ hours}} + \frac{\text{Number of Sessions (max 36)}}{36 \text{ Sessions}} \right\} \times \text{Ceiling Rate for each additional funded child In the unit}$$

- c) Maximum funding for a program unit is based on 800-hours of **centre-based programming** or 36 **family-oriented programming** sessions or combination thereof.
- d) See Additional information at the end of this section for calculation examples.

## ALLOCATION CRITERIA

1. Program Unit Funding (PUF) may be paid to a **school jurisdiction** for each eligible **child with a severe disability/delay** for a maximum of three years.
2. The funding amount paid will be the lesser of the program unit ceiling, the approved budget total, and the actual cost.
3. 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 jurisdictions** should plan the **funded child's** program so that the last year of PUF is the year prior to the **funded child's** entry into Grade 1.
4. **School jurisdictions** will use the categories and codes outlined in the definition of **students/ECS children with severe disabilities/delays** in the Glossary of Terms to determine a program unit **funded child's** eligibility, and to properly code the child for funding purposes.
5. A **funded child** receiving PUF is not eligible for ECS mild/moderate funding.

6. A **funded child** may be claimed by only one **ECS operator** at a time. The **school jurisdiction** claiming the **funded child** is responsible for ensuring the **funded child** is not claimed by another **ECS operator**.
7. Eligibility for PUF will be based on all of the following:
  - a) a diagnosis of a disability/delay or condition at the severe/profound level by qualified personnel (note: a diagnosis alone is not sufficient to qualify for funding);
  - b) written descriptions, results of educational assessments and/or anecdotal notes that indicate the **funded child's** current level of functioning in the ECS environment;
  - c) a current **Individualized Program Plan (IPP)** which addresses the **funded child's** educational needs; and
  - d) the levels of support and services being provided to the **funded child**.

To expedite the application approval process, pre-approval of a child's eligibility may be obtained by submitting assessment information to support the eligibility of the child. This information could include actual reports, summary information, or a format agreed upon with Alberta Education. When a **school jurisdiction** is uncertain of a child's eligibility, the operator is encouraged to discuss the issues of the child's eligibility with the Special Programs Branch of Alberta Education prior to making an application.

## DOCUMENTATION AND REPORTING REQUIREMENTS

- Revised**
1. A PUF application must be submitted to the School Finance Branch by December 22, 2006. Payment is based on approval of this application. Applications must be submitted electronically using the Program Unit Funding System (PUFS). A separate PUF application must be completed for each **school** that has **funded children** eligible for PUF. As part of the application, an individual budget must be submitted for each program unit listed on the application. Revisions to PUF applications will be accepted until April 1. Assessment information must be sent to the Special Programs Branch for approval of a child's eligibility prior to submission of a PUF application.

NOTE: All **school jurisdictions** are required to submit their PUF applications through PUFS. Workshops on how to use PUFS will be held in the fall. Staff using PUFS should have appropriate training before using the system.

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2. The following information pertaining to each **funded child** receiving PUF must be kept on file by **school jurisdictions** and made available to the Special Programs Branch upon request:
- a) an **Individualized Program Plan (IPP)** must be developed, implemented and regularly reviewed for each program unit **funded child**;
  - b) formal assessment documentation to support the severity of each program unit **funded child's** special needs;
  - c) informal assessment documentation reflecting current performance levels;
  - d) plans and summaries of **family-oriented programming** sessions conducted over the year;
  - e) current budget information.
3. **Revised** An application for a **funded child** who is identified or enrolled after December 22 will be accepted until April 1, using the process described in #1.
4. When a **funded child** leaves a program before the end date specified on the PUF application, please notify Alberta Education of the changes by submitting the PUF Application Adjustments Form (Form 06AE2.3b) to the School Finance Branch within 30 days of the child's departure. The original budget total and ceiling will then be adjusted.
5. **Revised** When a **child with a severe disability/delay** moves from one **ECS operator** to another within the school year, a new PUF application based on the **IPP** must be submitted by the second operator prior to April 1.
6. At the end of each school year, **school jurisdictions** must report actual expenditures for all program unit **funded children** using Form 06AE1.6, Statement of Actual Expenditures, as follows:
- Complete one statement for all program unit **funded children** except those program unit **funded children** in a **Designated Special Education ECS program**.
  - Complete a statement for each approved **Designated Special Education ECS program**.
- The form(s) must be returned to the School Finance Branch by October 31.
7. **Revised** If a program unit **funded child** has a medical condition/disability which has not changed significantly since the initial diagnosis and was previously approved by Alberta Education, an updated medical diagnosis is not required, however current documentation outlining current level of functioning is necessary to ensure continuation of PUF. This information must be kept on file and available for review by Alberta Education.

**School jurisdictions** must provide documentation to Alberta Education to support continued PUF for previously program unit **funded children** with a severe delay involving language, or any other condition likely to change significantly as a result of intervention, maturation or changes within the program unit **funded child's** environment. Documentation must include the following:

- a statement from the appropriate professional that the program unit **funded child** continues to demonstrate a severe disability/delay;
- description of the necessary supports and services the program unit **funded child** requires as a result of the disability/delay;
- description of the impact of the disability/delay on the program unit **funded child's** ability to function within the ECS environment.

It is the responsibility of the **school jurisdiction** to ensure that all **funded children** claimed under PUF meet the eligibility criteria outlined. **School jurisdictions** that are uncertain about the eligibility of a **funded child** are encouraged to contact the Special Programs Branch for confirmation of a child's eligibility.

**Revised** 8. **Clustering** (see definition in Glossary of Terms) should be the first option considered for PUF children. Whenever possible operators should cluster program unit **funded children** who share resources (regardless of setting). The decision to cluster **funded children** into a program unit should be based on the educational needs of the program unit **funded children**.

9. A program unit funded child's **centre-based programming** hours and **family-oriented programming** sessions must meet the child's needs. If a combined program of centre-based hours and **family-oriented programming** sessions is provided, there must be a minimum of four family-oriented programming sessions in order to be included in the ceiling calculation (see example of ceiling calculation). See definition of **Family-oriented Programming** in the Glossary of Terms. Also see definition of **Centre-Based ECS Programming** in the Glossary of Terms.

Note: **family-oriented programming** is not intended as the only form of programming a program unit **funded child** receives, but rather is intended to enhance the centre-based component of the child's education program as outlined in their **IPP**. (See definition of **Centre-Based ECS Programming**).

For funding purposes, **family-oriented programming** is claimed as sessions, where a session is defined as a minimum of 1.5 hours. A session involving more than one child and their **parent(s)** may be pro-rated based on the number of children and **parents** involved in the session and the length of session (minimum 45 minutes). Note: intervention provided by a member(s) of the child's learning team to the child, must involve the **parent/caregiver** in order to be counted as an eligible **family-oriented programming** session.

An eligible **family-oriented programming** session must meet the following conditions:

- a written plan must be developed for each session;
- it must be under the direction of the certificated teacher;
- every opportunity is explored to involve the child's **parents**;
- in exceptional circumstances, when it is not possible to involve the **parent** directly and the session is with an alternate caregiver, provision must be made for sharing information with the **parent**;
- it must involve the **parent** or alternate caregiver, the child (in most cases), and a teacher, or a developmental specialist under the direction of a teacher;
- a minimum of 4 sessions must be provided to be counted in the ceiling calculation on the PUF application;
- the frequency of **family-oriented programming** sessions is included in the child's **IPP**;
- programming must occur outside of time claimed under centre-based hours;
- **family-oriented programming** must be an additional cost to the **school authority**.

See also Additional Information item #6 on **family-oriented programming** sessions.

10. To access the full ceiling amount, the program must be a full-time program. A full-time program must provide either 800 hours of educational programming for a program unit **funded child in centre-based ECS programming** or a minimum of 36 **family-oriented programming** sessions during the school year, or the equivalent combination of hours and sessions. Special Programs Branch may review the setting and level of programming to ensure these meet the child's educational needs.
11. 800 hours is the maximum number of **centre-based ECS programming** hours that will be funded. Summer programs are not eligible for PUF and should not be included as part of the 800 hour maximum.

In some exceptional circumstances, for a **funded child's** last year of PUF, additional program hours beyond 800 hours (maximum of 950 hours) may be approved, based on an individual program unit **funded child's** needs. A written explanation of the need for the additional program hours must be submitted with the PUF application. Approval by the Special Programs Branch is required. This exception will be subject to the ceiling amount.

12. Program Unit Funding is supplemental to the ECS Base Instruction funding. It is intended to cover the additional program costs required to meet the educational needs of the **funded child with a severe disability/delay**.

For **school jurisdictions** that are providing a program for a **child with a severe disability/delay** in the regular ECS classroom: Base Instruction funding, Part 1, Section 1, is paid on behalf of all **funded children** in an **ECS program**. Base Instruction funding is available for a **child with a severe disability/delay** who is as young as 2 years 6 months on September 1. This funding supports the day-to-day operating costs of the program, such as teacher salaries, rent, utilities, and supplies.

Since these costs would be incurred whether or not a **child with a severe disability/delay** was in the program, they should not be included in the program unit expenditures. Teachers' salaries should not be included as program unit costs because the ECS Base Instruction funding supports these costs.

13. When completing the budget page of a PUF application the budget amounts should approximate anticipated costs. The following specifies the costs that may be included for PUF. Any exceptions to these costs should be discussed with Alberta Education before submitting the application.

a) Instructional Costs:

- i) Salaries, wages and employer's portion of benefits and expenditures applicable to teacher assistants directly involved in planning, implementing and evaluating the program for the program unit **funded child(ren)**. The number of hours claimed here may exceed the **funded child's** program hours by up to 10% for each child within that program unit. **Clustering** and small group program delivery should be considered as alternatives to full-time direct one-to-one assistance. Teacher Salary costs are not eligible costs under this category. (See Additional Information #7 on page 12 of this section).
- ii) Services Purchased – includes services of qualified personnel in the areas of speech-language pathology, occupational therapy, physical therapy, orientation and mobility training, special education consultation, psychological and other services, and assessment costs that are not provided free by public service agencies. Costs should be reasonable. **School jurisdictions** must keep records of all services purchased under PUF. All options regarding service delivery should be considered. **School jurisdictions** must ensure that all services purchased are relevant to the child's educational program and are in direct support of the goals and objectives included on the child's **IPP**.

Special Education Consultation is a service purchased by the **school jurisdiction** to provide programming support for the ECS teacher. Examples of services provided under Special Education Consultation include assistance with **IPP** development and review, programming strategies, suggested resources and materials, and support of off-site program components. Special education consultation is delivered by a certificated teacher with appropriate training and experience. On-site special education consultation costs are additional costs to the **school jurisdiction** that provide direct programming support. These costs will be subject to a maximum of \$1,500 per program unit **funded child** based on a full-time program. For programs less than 800 hours, the \$1,500 maximum will be pro-rated based on the program hours and number of eligible **family-oriented programming** sessions.



For example, special education consultation costs for 475 hours and 6 **family-oriented programming** sessions would be calculated as follows:

$$\$1,500 \times \left( \frac{475}{800} + \frac{6}{36} \right) = \$1,141$$

**School jurisdictions** must keep records of costs and services associated with special educational consultation.

## Revised

Playschool or pre-school fees may be claimed as an eligible PUF expense under Services Purchased. **School jurisdictions** may find it necessary sometimes to contract placement in a daycare setting for delivery of the child's educational program. The following apply for daycare placements:

- The placement in the daycare is the best available option for the child's educational program.
- The child has not been previously placed in the daycare by the parent for childcare purposes.
- Daycare fees may only be claimed for that portion of day required for the educational component of the child's program.
- Costs for childcare are not eligible to be claimed under PUF.

In general, the educational needs of young children (3-4 years old) are most appropriately met in a program that is 475 hours or less.

- iii) Supplies and materials – instructional supplies and materials which are particular to the program unit **funded child's** program, and are in addition to supplies purchased with Base Instruction funding. Costs in this area are usually in the \$200 - \$500 range per program unit **funded child**. **School jurisdictions** are encouraged to maintain a resource inventory and an equipment loan pool.
- b) **Parent In-service** – costs for **parents** to attend in-province workshops, seminars, in-service and specialized training sessions specifically related to the **funded child's** program and designed to enhance the ability of **parent(s)/guardian(s)** to assist in the program unit **funded child's** development. Costs in this category are usually in the \$100 - \$400 range per program unit **funded child**.
- c) **Staff In-service** – costs for teachers and teacher assistants to attend workshops, in-service, special courses and seminars related to staff responsibilities in the program unit **funded child's** program and in parental assistance. Costs in this category are usually in the \$200 - \$500 range per program unit **funded child**. Personnel included in Services Purchased are not eligible for Staff In-service.

- d) Transportation - Funding to **school jurisdictions** for transportation of program unit funded children is available under sections 1.19 (Rural), 1.21 (Special), 1.20 (Urban), and 1.22 (Metro). Funding for these sections may be claimed by submitting an electronic transportation application.

Transportation costs for **children with severe disabilities/delays** not covered by these transportation grants, may be claimed as a PUF expense. To determine the amount of transportation costs that may be covered by PUF, all transportation costs must be listed on the PUF budget, then all transportation revenues must be deducted from the transportation costs. The following descriptions indicate the types of transportation costs which can be claimed and which transportation grants are available.

## Revised

- i) Transportation to and from school: If a PUF child can ride a regular school bus, then rural, urban or metro transportation funding shall be claimed under Sections 1.19, 1.20, or 1.22. If a PUF child is not able to ride a regular school bus (either because of their disability or because of their young age) and requires some form of special transportation, then special transportation funding can be claimed under Section 1.21. Transportation costs (for PUF children) that exceed the funding paid under Sections, 1.19, 1.20, 1.21 or 1.22, may be claimed as an eligible cost on the PUF budget form;
- ii) Family-oriented Programming Sessions: Transportation funding for these costs may be claimed under Section 1.21 by rural, urban and metro districts for each scheduled **family-oriented programming** session attended by a member of the child's learning team. Funding provided is based on the number of **family-oriented programming** sessions up to a maximum of 36 sessions. Transportation costs in excess of the funding paid under Section 1.21 may be claimed as transportation costs under PUF;
- iii) Other – Field Trips: Transportation costs for field trips that are provided in addition to field trips for the regular ECS class or for a program unit funded child who, because of his/her disability, requires special transportation on a regularly scheduled field trip may be claimed under PUF; and
- iv) In-Program: In-program transportation is transportation of the program unit funded child from the **school/centre** program off-site to another program or service as part of the program unit **funded child's Individualized Program Plan (IPP)**. Transportation costs for this area may be claimed as transportation costs under PUF.

Note: transportation claims must be submitted electronically to the Financial Reporting and Accountability Branch by November 30. Only program unit funded children who were enrolled by the **count date** are eligible for transportation funding.

## e) Operations and Maintenance

Plant Operations and Maintenance funding is provided by Alberta Education. Costs for this category may not be claimed on the PUF budget.

## f) Administration

**Revised**

Funding for administration is included the ECS Base Instruction funding. Costs for this category may not be claimed on the PUF budget.

g) Capital: Furniture and Equipment – these are child specific expenditures for specialized furniture and equipment, that are not available from another source, and are required to meet the special needs of a program unit funded child. **School jurisdictions** are advised to keep current on information regarding provision of adaptive or augmentative devices by other agencies. Managers from Special Programs Branch are available to provide assistance and advice in this area.**Revised**

i) For any major equipment or furniture purchase, a written recommendation from an appropriate specialist indicating the necessity for the equipment is required. The letter from the specialist should specify the relevance of the equipment to the child's educational program and how it directly supports the goals and objectives of the child's **IPP**. The letter should also include projected costs of the capital equipment. This letter should be faxed to the Special Programs Branch.

ii) Costs of capital equipment must be reasonable. In some cases the **ECS operator** may be required to provide 2 or more price quotations prior to approval. Approval by the Special Programs Branch is required for all capital expenditures.

iii) Expenditures should not exceed 15% of the total PUF budget.

iv) A specialized piece of furniture or equipment no longer used by the program unit **funded child** remains the property of the **school jurisdiction**, not of the program unit **funded child** or **parents** of the program unit **funded child**. If a program unit **funded child** changes **schools** in Alberta but continues to have use for the specialized furniture or equipment specifically purchased for that child – the furniture or equipment goes with the program unit **funded child**.

v) Renovations to a building to be used for the benefit of all program unit **funded children** in the instructional area are not eligible for support under this section. **School jurisdictions** receive funding for renovations from Alberta Education.

vi) Administrative capital purchases cannot be claimed under this category.

#### 14. Designated Special Education ECS programs

These are **ECS programs** where at least 70% of the program unit funded children enrolled have a severe disability/delay. The following requirements apply.

- a) A program must be approved as an ECS operator by Alberta Education prior to applying for status as a Designated Special Education ECS program.
- b) Applications for new programs must be submitted as a proposal to the Director of the Special Programs Branch by June 1, for approval. To be considered for this designated status, the program must have operated as an ECS operator for at least one year and must have a minimum enrollment of at least 10 program unit funded children. Newly designated programs will be subject to program review within the first year. The proposal should contain the following information:
  - a rationale for applying for status as a **Designated Special Education ECS program** including the potential benefits to **children with severe special needs** and their families. The rationale should also explain why the program could not operate as a regular **ECS program** and should highlight how receiving the designated status will resolve those issues;
  - an overview of the proposed program including population served, program format, service delivery model, support services provided, opportunities for inclusion, transition to the community **school** and a brief summary of the role descriptions of program staff;
  - a proposed budget completed using Form 06AE2.3a. This budget should outline all estimated expenditures and projected revenues; and
- c) **Designated Special Education ECS programs** must comply with all Allocation Criteria on Program Unit Funding outlined in Section 1.6 of this Manual. These programs must also comply with the principles contained in Alberta Education's *Kindergarten Statement Revised September 2005*.
- d) **ECS operators** who qualify for this status may claim all education program costs except capital building costs.
- e) A budget based on the total education program costs must be submitted on a PUF application for **Designated Special Education ECS Programs**.
- f) Operation & Maintenance costs: This would include costs associated with the operation and maintenance of the **school** facility and would also include rent costs. PUF will cover costs in this category that exceed the funding provided by Alberta Education.
- g) Administration: Reasonable costs for administration of the **ECS program** may be claimed here. Costs in this area are typically in the 6% to 12% range. Costs in this category should not include any central office administration costs/charges.

Revised

- h) Capital costs must meet the specific needs of a program unit **funded child** or a group of program unit **funded children** to be eligible. An itemized list of capital must be included with the application if costs are claimed in this category.
- i) 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 program unit funding will apply.
- j) **Designated Special Education ECS programs** must maintain a minimum enrollment of at least 10 program unit **funded children** to retain their designated status. The ECS operator must notify the Director, Special Programs branch if enrollment declines below 10 funded children.
- k) Existing **Designated Special Education ECS programs** must apply to the Special Programs Branch, in writing by June 1, of the intent to expand to another site or location.
- l) The status of approved **Designated Special Education ECS programs** may be reviewed and withdrawn at any time by Alberta Education.

## ADDITIONAL INFORMATION

1. 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 s/he 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 jurisdiction** and the **parent**, an **ECS program** is the most appropriate program for the PUF child.

2. The following table shows how to calculate the ceiling amount for a program unit with one **funded child** in a program of **centre-based ECS programming** hours, and also a program based on a combination of **centre-based ECS programming** hours and **family-oriented programming** sessions:

Calculation of the ceiling for <b>centre-based ECS programming</b> of 500 hours	Calculation of the ceiling for a <u>combined program</u> based on 500 <b>centre-based ECS programming hours</b> and 10 <b>family-oriented programming sessions</b> .
$\begin{array}{rcl} 500 \text{ hrs} & \times & \$22,584 \\ 800 \text{ hrs} & & \\ \hline = & & \$14,115 \end{array}$	$\left\{ \frac{500}{800} + \frac{10}{36} \right\} \times \$22,584$ $= \$20,388$

Note: If the ceiling calculation results in a number greater than the ceiling amount then the ceiling would apply.

- Revised** 3. The program unit funding rates should be viewed as maximum ceilings only. Provincial statistics indicate the costs of most programs average about \$14,500 per program unit funded child. Careful stewardship of funds by **school jurisdictions** is integral to the PUF program.

4. For a program unit with more than one **funded child**, the ceiling is calculated as follows:

- Choose the program unit **funded child** with the highest combination of **centre-based ECS programming** hours and **family-oriented programming** sessions.
- Calculate the ceiling for this program unit **funded child** as follows:

$$\left\{ \frac{\# \text{ hours}}{800} + \frac{\# \text{ sessions}}{36} \right\} \times \$22,584$$

- To this amount, add, for each additional **funded child** in the program unit as follows:

$$+ \left\{ \frac{\# \text{ hours}}{800} + \frac{\# \text{ sessions}}{36} \right\} \times \$5,603$$

Example: For a program unit (cluster) of three **funded children**, where:

- Program unit **funded child #1** has 500 hours and 10 **family-oriented programming** sessions
- Program unit **funded child #2** has 400 hours, no **family-oriented programming** sessions
- Program unit **funded child #3** has 600 hours and 4 **family-oriented programming** sessions

The ceiling is then calculated as follows:

$$\begin{aligned}
 & \left[ \frac{500}{800} + \frac{10}{36} \right] \times \$22,584 = \$20,388 \\
 & + \left[ \frac{400}{800} \right] \times \$5,603 = \$2,802 \\
 & + \left[ \frac{600}{800} + \frac{4}{36} \right] \times \$5,603 = \$4,825 \\
 & \hline
 & = \text{Total ceiling for the unit} \quad \$28,015
 \end{aligned}$$

5. Funding ceiling amounts will be adjusted when a **funded child's** program starts after the September 30 or ends prior to May 25. Funding ceiling amounts will be adjusted when a **funded child** leaves the program earlier than planned. In these situations, the ceiling will be the lesser of:
- A pro-rated ceiling amount of approximately \$2,258 per month for the number of months the program runs; or
  - The ceiling amount based on **centre-based ECS programming** and the number of **family-oriented programming** sessions provided.

For example, the ceiling amount for a program unit funded child in a four month program with 300 hours and 4 **family-oriented programming** sessions would be calculated as follows:

Ceiling calculation for a 4 month program in a 10 month program year
<p>Lesser of:</p> <p>a) \$22,584 x 4/10 = \$9,034 or</p> <p>b) \$22,584 x (300/800 + 4/36) = \$10,978</p> <p>Ceiling amount is \$9,034</p>

## 6. **Family-oriented Programming** Sessions:

The following are examples of what can be counted as an eligible **family-oriented programming** session:

- a teacher provides **family-oriented programming** to a child and his/her **parent** for a minimum of 1.5 hours;
- a teacher or Speech Language Pathologist under the direction of the teacher provides two 45 minute sessions to 2 children and their **parents** or alternate caregivers at the **school**;
- an occupational therapist, under the direction of the teacher, provides intervention that involves both the child and the **parent**/alternate for 1.5 hours;
- an in-home consultant models behavior management strategies with the child and provides a rationale to the **parent**/alternate caregiver for 1.5 hours;
- teacher facilitates four 1.5-hour “play dates” with four children and their **parents**/alternate caregivers. For this example, one session may be claimed for each child;
- a family liaison worker accompanies **parent** and child to a grocery store and demonstrates strategies for incidental teaching of social skills and early academic skills for 1.5 hours;
- a consultation with medical personnel and/or psychologists, that involves the child’s learning team and occurs outside the centre, must be a minimum length of 45 minutes and can be counted as a 0.5 session. A school authority can claim a maximum of one session per child per year for consultation.

The following cannot be counted as an eligible **family-oriented programming session**:

- informal **parent** contact or contact that is typically required as a component of a school-based special education program (e.g. **IPP** meetings; concerts; classroom parties);
- contact with **parents** or alternate caregivers occurring during the time that is already claimed under centre-based hours;
- time involved in travel to and from child’s home or childcare centre;
- intervention provided by a member(s) of the child’s learning team to the child that does not involve the **parent**/caregiver;
- provision of intervention that is not directly related to the goals in the child’s **IPP**;
- informal visits to the home;
- information contact by **school** personnel;
- telephone calls;

7. **School jurisdictions** may appeal PUF decisions by writing the Director of the Special Programs Branch.

## REFERENCES

*Program Unit Funding: A Handbook for ECS Operators*



## ALLOCATION DESCRIPTION

New

This funding, which is in addition to Base Instruction funding, is provided to address the costs associated with providing the appropriate services and supports for **students with a severe disability**. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

## ALLOCATION FORMULA

$$\begin{array}{l} \text{Severe Disabilities} \\ \text{Allocation} \end{array} = \begin{array}{l} \text{Number of profiled} \\ \text{students with a} \\ \text{severe disability} \end{array} \times \begin{array}{l} \text{Severe Disabilities} \\ \text{Rate} \end{array}$$

## ALLOCATION CRITERIA

Revised

1. Funding is provided to **school jurisdictions**, excluding **charter schools**, based on the established severe disabilities profile for the jurisdiction that includes historical data of the numbers of **students with a severe disability**, provincial patterns of overall student enrollment growth and projections for growth of the numbers of **students with a severe disability**.
2. Funding is provided to **charter schools** based on the eligibility of individual **students with a severe disability**. **Charter schools** that claim funding for **students with a severe disability** must comply with the conditions and requirements in Section 3.3.

## DOCUMENTATION AND REPORTING REQUIREMENTS

1. Funding for **students with a severe disability** will be based on a jurisdiction program number but all of the following requirements will need to be maintained and implemented at the **school** level:
  - a) assessment and diagnosis by qualified personnel;
  - b) documentation/assessments of the student's current level of functioning in the learning environment;
  - c) a current **Individualized Program Plan (IPP)** which addresses the student's diagnosed needs; and
  - d) identification of the levels of support and services being provided to the student.

2. The **Individualized Program Plan (IPP)** must be supported by appropriate medical, psychiatric, psychological or other professional documentation for each **student with a severe disability** identified and attending a **school** of the jurisdiction.
3. **Students with a severe disability** included in the profile must receive three or more of the levels of support identified in ADDITIONAL INFORMATION 5 (d);
4. **School jurisdictions** will use the severe disabilities categories and codes as outlined in the definition of **students with a severe disability** in the Glossary of Terms, the *Standards for Special Education, Amended June 2004* 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.
5. **School jurisdictions** must report **students with a severe disability** enrolled as of the **count date**, to the Information Services Branch by October 5.

#### ADDITIONAL INFORMATION

1. Students who are registered with one **school jurisdiction** on the **count date** and who then move to another **school jurisdiction** after the **count date**, are not eligible for additional funding because the severe disabilities profiles include accommodation for student movement during the year. This would also apply to students who move from an **institution** (i.e., a hospital program, young offender centre, etc) or from out of province to a **school jurisdiction** after the **count date**.
2. A **school jurisdiction** that directs a **student with a severe disability** under an **educational services agreement** to another **school authority** is responsible for all educational program costs that are not covered by funding provided by Alberta Education to the **school authority** providing the student's program.
3. When a **student with a severe disability** transfers after the **count date** from a **school jurisdiction** to an **accredited-funded private school**, including a DSEPS, the **school jurisdiction** is not required to transfer severe disabilities funding to the **accredited-funded private school**.
4. **School jurisdictions** may request an audit of their severe disabilities profile if there are significant increases or decreases to the number of **students with a severe disability** by writing the Director, Special Programs Branch by November 1.

Revised

5. The audit will consider the eligibility and approval of severe disabilities funding based on a review of each student's file. Each file must contain all the following information:
- a) assessment and diagnosis by qualified personnel (note: a diagnosis alone is not sufficient to qualify for funding);
  - b) documentation/assessments of the student's current level of functioning in the learning environment;
  - c) a current **Individualized Program Plan (IPP)**;
  - d) identification of the types of support and services being provided to the student. Students claimed for severe disabilities funding must receive three or more of the following types of support:
    - i) specialized equipment or assistive technology;
    - ii) assistance with basic care (e.g., toileting, grooming, catheterization);
    - iii) a minimum 0.5 FTE one-to-one instruction/intervention/support (e.g., specialized teacher and/or teacher assistant time);
    - iv) frequent documented monitoring of medical and/or behaviour status; and
    - v) direct specialized services at cost to the system (e.g., behaviour specialist, orientation and mobility specialist).
6. For **students with a severe disability** in a **charter school**, who transfer after the **count date** to an **accredited-funded private school** (or vice versa), severe disabilities funding must be transferred by the **charter school** to the **accredited-funded private school** (or vice versa) on a pro-rated basis, based on a 10 month program year.

## REFERENCES

Standards for Special Education, Amended June 2004

Handbook for the Identification and Review of Students with Severe Disabilities

## ALLOCATION DESCRIPTION

New

This funding, which is in addition to Base Instruction funding, is provided to address the costs associated with providing for the educational needs of eligible **funded children/students** who have insufficient fluency in English. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

## ALLOCATION FORMULA

$$\text{ESL Allocation} = \left\{ \begin{array}{l} \text{Eligible ESL FTE } \mathbf{funded} \\ \mathbf{children: Canadian-born} \\ \text{and Foreign-born} \end{array} + \begin{array}{l} \text{Eligible ESL } \mathbf{funded} \\ \mathbf{students: Canadian-born} \\ \text{and Foreign-born} \end{array} \right\} \times \text{ESL Rate}$$

## ALLOCATION CRITERIA

Updated

1. A **school jurisdiction** with **funded children/students** who have insufficient fluency in English to achieve grade level expectations in English Language Arts and other subject areas may receive English as a Second Language (ESL) funding for eligible ESL **funded children** counted at 0.5 full-time equivalent and eligible ESL **funded students** in Grades 1 to 12.

2. **Funded children/students** eligible for ESL funding:

- a) Come from homes in which the primary spoken Language is not English; and
- b) Speak minimal English or are non-English speaking.

Updated

3. There are two enrollment counts that are taken for funding both Canadian born ESL **funded children/students** (code 303) and Foreign-born ESL **funded children/students** (code 301) - one on the **count date** and the other on March 1. The March 1 count provides funding for in-year growth in both Canadian born ESL enrollments and Foreign-born ESL enrollments. Each count will be used for funding 50% of the school year, unless the March 1 count of ESL students is lower than the count on the **count date**, then the count on the **count date** will be used for the entire school year.

4. Coding of an eligible ESL **funded child/student** must also be supported by an annual assessment of the student's language proficiency in English. This assessment documentation must be kept on file at the **school** and made available upon request.

- Revised**  
**Updated**
5. After three years of ESL instruction, it is expected most students would have sufficient fluency in English to access regular programming, although some students may require additional time. Funding is provided for a maximum of 7 years for eligible ESL **funded children/students**.
  6. **Funded students** enrolled in Home education, **blended programs, outreach programs** or **on-line programs** are not eligible for funding under this section.

## **DOCUMENTATION AND REPORTING REQUIREMENTS**

1. Student registration information for ECS to Grade 12 as of the **count date** of the current school year must be submitted to the Information Services Branch by October 5. This registration must include Canadian-born (code 303), Foreign-born (code 301) and unfunded (code 302) ESL students. This coding of ESL students is required for **school jurisdictions** to receive funding.
2. March 1 (excluding unfunded - code 302): Student registration for ECS to Grade 12, ESL Canadian-born (code 303) and Foreign-born (code 301), as of March 1 must be submitted to the Information Services Branch by March 6, 2007.
3. **Francophone regional authorities** cannot claim both **Francisation** funding and ESL funding for the same child/student.
4. See also Section 1.25 for funding on Enhanced ESL and Support Services for Immigrant Students.

## ALLOCATION DESCRIPTION

New

This funding, which is in addition to Base Instruction funding, is provided to address the costs associated with providing for the educational needs of eligible First Nations, Métis, and Inuit students/children. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

## ALLOCATION FORMULA

$$\text{First Nations, Métis and Inuit (FNMI) Education Allocation} = \left\{ \begin{array}{l} \text{Number of FNMI students} \\ + \\ \text{Number of FTE FNMI children} \end{array} \right\} \times \text{FNMI Rate}$$

## ALLOCATION CRITERIA

1. The number of eligible FNMI students/children used to calculate FNMI Education Funding for 2006-2007 will be based on either the Statistics Canada 2000-2001 census data or on the number of self-identified **funded children/students** – whichever option **school jurisdictions** chose in 2004-2005. **School jurisdictions** that elected to use self-identified numbers in 2004-2005, will continue on that basis. **School jurisdictions** who elected to use the Statistics Canada data in 2004-2005, may choose to continue on that basis for 2006-2007 or they may elect to change to the number of self-identified **funded children/students**. **School jurisdictions** wanting to make this change for 2006-2007 must notify the Director of School Finance Branch in writing by October 31, 2006. Please note, once a **school jurisdiction** chooses to use the self-identified option, the choice is permanent and cannot be changed in the future. See the table on the next page.
2. FNMI funding is provided to a **school jurisdiction** based on the number of students and the number of ECS children counted as 0.5 full-time equivalent.

## DOCUMENTATION AND REPORTING REQUIREMENTS

1. All **school jurisdictions** receiving FNMI Education Funding must report FNMI student achievement and high school completion rates in their Annual Education Results Report as specified in the *Guide to School Board Planning and Reporting*.

2. The following types of self-identified FNMI students/children who reside off reserve are funded by Alberta Education and should be coded follows:

Code 331 Aboriginal Learner – Status Indian/First Nations

Code 332 Aboriginal Learner – Non Status Indian/First Nations

Code 333 Aboriginal Learner – Métis

Code 334 Aboriginal Learner – Inuit

These students/children are self-identified and a signed declaration is required on the school registration form.

## ADDITIONAL INFORMATION

1. FNMI student registration information is taken on the **count date** of each school year and submitted to the Information Services Branch by October 5. The 2006-2007 school year is the third year of the Data Collection Initiative and involves the self-identification registration process being led by the Aboriginal Policies Sector, Alberta Education. For further information or if you have questions regarding the collection activity, please contact the Information Services Help desk at (780) 427-5318. For **school jurisdictions** who chose to use the Statistics Canada data, FNMI funding will be based on the statistical data for each year as outlined in the following table:

School Year	Funding based on 2000-2001 Statistics Canada Data	Funding based on Self- Identification
2004-2005	100%	0%
2005-2006	75%	25%
2006-2007	50%	50%
2007-2008	25%	75%
2008-2009	0%	100%

- Updated** 2. **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 as 330.

## REFERENCES

*Policy, Regulations and Forms Manual*

*First Nations, Métis and Inuit Education Program Guide*

*The First Nations, Métis and Inuit Education Policy Framework*

*Guide to School Board Planning and Results Reporting*

### **ALLOCATION DESCRIPTION**

**New**

This funding, which is in addition to Base Instruction funding, is provided to address the costs associated with providing for the educational needs of **funded children/students** who are socially or economically disadvantaged. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

### **ALLOCATION FORMULA**

$$\text{SES Allocation} = \text{Incidence Rate} \times \left\{ \begin{array}{l} \text{\# of FTE funded} \\ \text{children} \end{array} + \begin{array}{l} \text{\# of funded} \\ \text{students} \end{array} \right\} \times \text{SES Rate}$$

### **ALLOCATION FORMULA**

1. SES funding is provided to a **school jurisdiction** based on FTE **funded children** counted at 0.5 full-time equivalent and the number of **funded students** that is equal to the **funded student** head count.
2. The Incidence Rate for a **school jurisdiction** is determined by School Finance using the following four indicators. The first three are provided by Statistics Canada and the last one by Alberta Education:
  - a) percent of families living below the Low Income Cutoff (LICO),
  - b) average number of years of education of mothers,
  - c) percent of families headed by a lone **parent**, and
  - d) transience rate, based on a student mobility rate.
3. The incidence rate for a **charter school** will be determined by taking the average of the incidence rates of the public and separate **school jurisdictions** in which the **charter school** is located -except in cases where the **school's** population clearly has a different SES incidence rate from the average, e.g. Boyle Street.
4. 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.
5. Students enrolled in home education are not counted for funding under this section.



**SOCIO-ECONOMIC STATUS INCIDENCE RATES**

<b>School Jurisdictions</b>	<b>SES Incidence Rates rounded to 3 decimals (as used in SAFRS/original Profiles)</b>
Almadina School Society	0.500
Aspen View Regional Division No. 19	0.207
Aurora School Ltd.	0.253
Battle River Regional Division No. 31	0.180
Black Gold Regional Division No. 18	0.176
Boyle Street Education Centre	1.000
Buffalo Trail Public Schools Regional Division No. 28	0.171
Calgary Arts Academy Society	0.216
Calgary Girls' School Society	0.216
Calgary Roman Catholic Separate School District No. 1	0.206
Calgary School District No. 19	0.225
Calgary Science School Society	0.216
Canadian Rockies Regional Division No. 12	0.128
CAPE – Centre for Academic and Personal Excellence Institute	0.230
Chinook's Edge School Division No. 73	0.188
Christ the Redeemer Catholic Separate Regional Division No. 3	0.186
Clearview School Division No. 71	0.165
East Central Alberta Catholic Separate Schools Regional Division No. 16	0.190
East Central Francophone Education Region No. 3	0.190
Edmonton Catholic Separate School District No. 7	0.242
Edmonton School District No.7	0.263
Elk Island Catholic Separate Regional Division No. 41	0.143
Elk Island Public Schools Regional Division No. 14	0.162
Evergreen Catholic Separate Regional Division No. 2	0.151
Foothills School Division No. 38	0.159
Fort McMurray Roman Catholic Separate School District No. 32	0.203
Fort McMurray School District No. 2833	0.211
Fort Vermilion School Division No .52	0.228
Foundations for the Future Charter Academy Charter School Society	0.216
Golden Hills School Division No. 75	0.192
Grande Prairie Roman Catholic Separate School District No. 28	0.175
Grande Prairie School District No. 2357	0.224
Grande Yellowhead Regional Division No. 35	0.196
Grasslands Regional Division No. 6	0.178
Greater North Central Francophone Education Region No. 2	0.215
Greater Southern Public Francophone Education Region No. 4	0.200
Greater Southern Separate Catholic Francophone Education Region No. 4	0.200
Greater St. Albert Catholic Regional Division No. 29	0.163
High Prairie School Division No. 48	0.245
Holy Family Catholic Regional Division No. 37	0.229
Holy Spirit Roman Catholic Separate Regional Division No. 4	0.205
Horizon School Division No. 67	0.191
Lakeland Roman Catholic Separate School District No. 150	0.203
Lethbridge School District No. 51	0.236
Living Waters Catholic Regional Division No. 42	0.197
Livingstone Range School Division No. 68	0.195

**SOCIO-ECONOMIC STATUS INCIDENCE RATES**

<b>School Jurisdictions</b>	<b>SES Incidence Rates rounded to 3 decimals (as used in SAFRS/original Profiles)</b>
Lloydminster Public School Division	0.200
Lloydminster Roman Catholic Separate School Division	0.200
Medicine Hat Catholic Separate Regional Division No. 20	0.215
Medicine Hat School District No. 76	0.245
Moberly Hall School Society	0.207
Mother Earth's Children's Charter School Society	0.188
New Horizons Charter School Society	0.253
Northern Gateway Regional Division No. 10	0.214
Northern Lights School Division No. 69	0.212
Northland School Division No. 61	0.355
Northwest Francophone Education Region No. 1	0.225
Palliser Regional Division No. 26	0.205
Parkland School Division No. 70	0.188
Peace River School Division No. 10	0.209
Peace Wapiti School Division No. 76	0.185
Pembina Hills Regional Division No. 7	0.199
Prairie Land Regional Division No. 25	0.153
Prairie Rose School Division No. 8	0.175
Red Deer Catholic Regional Division No. 39	0.224
Red Deer School District No. 104	0.260
Rocky View School Division No. 41	0.158
St. Albert Protestant Separate School District No. 6	0.151
St. Paul Education Regional Division No. 1	0.246
St. Thomas Aquinas Roman Catholic Separate Regional Division No. 38	0.215
Sturgeon School Division No. 24	0.173
Suzuki Charter School Society	0.253
Westmount Charter School Society	0.216
Westwind School Division No. 74	0.178
Wetaskiwin Regional Division No. 11	0.234
Wild Rose School Division No. 66	0.196
Wolf Creek School Division No. 72	0.193

**DOCUMENTATION AND REPORTING REQUIREMENTS**

1. Student registration information for **funded children** and **funded students** as of the **count date** of the current school year that is submitted to the Information Services Branch by October 5.
2. **School jurisdictions** are not required to apply for funding under this section. School Finance will determine the funding allocation of **school jurisdictions**.

## ALLOCATION DESCRIPTION

**New**

This funding, which is in addition to Base Instruction funding, is provided to address the higher costs associated with operating schools with low enrollments, where it is not feasible to transport students from these schools to other schools of the same school jurisdiction due to distance and capacity constraints. This is an allocation method only; school jurisdictions have maximum flexibility and responsibility to use these funds in whatever manner best meets their local needs.

## ALLOCATION FORMULA

$$\text{Small Schools by Necessity} = \left\{ \begin{array}{c} \text{Total} \\ \text{Base} \\ \text{Allocation} \end{array} + \begin{array}{c} \text{Total} \\ \text{Variable} \\ \text{Allocation} \end{array} \right\} \times \left\{ \begin{array}{c} \text{Total \# of} \\ \text{Small Schools} \\ \text{by Necessity} \end{array} / \begin{array}{c} \text{Total \# of} \\ \text{Small} \\ \text{Schools} \end{array} \right\}$$

**Updated**

**+** Closed Schools Allocation (where applicable)

The variables in the formula above are explained in more detail in the Allocation Criteria.

## ALLOCATION CRITERIA

The 'FTE funded enrollment' used in Allocation Criteria #1 (Total Base Allocation) and Allocation Criteria #2 (Total Variable Allocation) is determined by counting the number of **funded students** that is equal to the **funded student** head count, plus the number of **funded children** as 0.5 full-time equivalent (fte).

### 1. Total Base Allocation:

**Updated**

- a) For each school with a 'FTE funded enrollment' of 150 or fewer;  
Base Allocation = \$79,591.
- b) For each school with a 'FTE funded enrollment' greater than 150 but fewer than 226;

$$\text{Base Allocation} = \$79,591 - \left[ \frac{\$79,591}{76} \times \left\{ \begin{array}{c} \text{FTE} \\ \text{funded} \\ \text{enrollment} \end{array} - 150 \right\} \right]$$

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

2. Total Variable Allocation:**Updated**

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 enrollment in Grades 7 to 9 or a school with enrollment in K to 8, the 'best fit' category would be K to 9. For a school with enrollment in Grades 9 to 12, the 'best fit' category would be K to 12.

TABLE 1.

Grade Category	School Rate	Peak Enrollment	Small School *FTE Funded Enrollment Limit	# of Grades in the Grade Configuration
K to 3	\$530	40	80	3.5
K to 6	\$1,486	80	150	6.5
K to 9	\$1,698	80	220	9.5
K to 12	\$2,653	80	290	12.5

Once each school is categorized, the data from Table 1 is used to in the following formulas to calculate the Variable Allocation for each school:

For each school,

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

Where

$$\text{Grade Factor} = \left\{ \frac{\text{Actual \# of grades with FTE funded enrollment}}{\text{\# of Grades in the Grade Configuration}} \right\}$$

And

- a) For each school with a 'FTE funded enrollment' fewer than or equal to the Peak Enrollment (see Table 1):

$$\text{Unadjusted FTE funded enrollment rate} = \left\{ \frac{\text{School Rate}}{\text{Peak Enrollment}} \right\} \times \text{FTE funded enrollment}$$

- b) For each school with a 'FTE funded enrollment' greater than the Peak Enrollment but fewer than or equal to the *Small School* \*FTE Funded Enrollment Limit (see Table 1):

$$\text{Unadjusted FTE funded enrollment rate} = \text{School Rate} - \left[ \text{Smoothing Factor} \times \left\{ \text{FTE funded enrollment} - \text{Peak Enrollment} \right\} \right]$$

Where

$$\text{Smoothing Factor} = \frac{\text{School Rate}}{\left\{ \text{Small School *FTE Funded Enrollment Limit} - \text{Peak Enrollment} \right\}}$$

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

3. Total # of Small Schools

Updated

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 # of Small Schools by Necessity

Updated

For this section, 'FTE funded enrollment' is the **funded students** counted at 1.0 full-time equivalent (fte), **funded students with severe disabilities** counted at 3.0 fte, and **funded children** counted at 0.5 fte.

Each small school (identified in step 3) is deemed to be 'necessary' or 'not necessary' based on the transportation of its 'FTE funded enrollment' 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% of the school building capacity, less the 'FTE funded enrollment'.
- c) The small school 'FTE funded enrollment' can be allocated to a maximum of 2 '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 # of small schools by necessity is the total number of schools that meet the latter condition.

5. Closed Schools Allocation

Updated

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 to be included for funding under this section.

**DOCUMENTATION AND REPORTING REQUIREMENTS**

1. Student registration information for **funded children** and **funded students** as of the **count date** of the current school year that is submitted to the Information Services Branch by October 5.
2. Students enrolled in Home education programs, **charter schools**, and Hutterite Colony Schools are not counted for funding under this section.
3. **School jurisdictions** are not required to apply for funding under this section. School Finance will determine their funding allocations.
4. **Schools** of choice will not be considered in Small Schools by Necessity funding. The following list provides examples of the excluded categories of these **schools**:
  - Outreach Schools
  - Home Education Schools
  - Religious Education Schools
  - Hutterite Colony Schools
  - **Schools** that mainly serve students/children with severe special needs
  - Hockey/Dance Schools
  - Institutional Schools
  - On-Line Schools
  - Language/Cultural Schools
  - French Immersion Schools

This is not intended to be a complete list of all the categories but, for the purpose of this section, is intended to provide clarification of what is meant by **schools** of choice.

## ALLOCATION DESCRIPTION

**New**

This funding, which is in addition to Base Instruction funding, is provided to address the differential costs associated with providing educational services and operating **schools** in geographically widespread areas. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

## ALLOCATION FORMULA

Intra-Jurisdiction Distance funding is determined using either a) or b) below:

- a) For **schools** in urban centres: intra-jurisdiction distance funding is the sum of the results of the following distance calculation for each **school**:

$$\text{Intra-Jurisdiction Distance Allocation} = \left\{ \begin{array}{l} \text{Distance from each} \\ \text{school to the central} \\ \text{administration office of} \\ \text{the school} \\ \text{jurisdiction} \end{array} - 15 \text{ kms} \right\} \times \text{Eligible FTE funded enrollment}^* \times \text{Distance Rate}$$

OR,

- b) For **schools** not in an urban centre: Intra-jurisdiction distance funding is the sum of the results of the following distance calculation for each **school**:

$$\text{Intra-Jurisdiction Distance Allocation} = \left\{ \begin{array}{l} \text{Distance from each} \\ \text{school to the central} \\ \text{administration office of} \\ \text{the school} \\ \text{jurisdiction} \end{array} - 25 \text{ kms} \right\} \times \text{Eligible FTE funded enrollment}^* \times \text{Distance Rate}$$

\*For the purpose of this section, eligible FTE funded enrollment is the number of **funded children** counted at 0.5 full-time equivalent plus the number of **funded students** in the eligible **school**. An eligible **school** will be funded at a minimum 100 FTE or the actual enrollment whichever is greater.

**ALLOCATION CRITERIA**

1. For the purpose of this section, urban centre means Calgary, Edmonton, Red Deer, Lethbridge, Medicine Hat, Fort McMurray, Grande Prairie, and St. Albert.
2. Intra-jurisdiction distance funding is provided to a **school jurisdiction** for the FTE funded enrollment of each qualifying **school** of the jurisdiction.
3. Funding is provided to a **school jurisdiction** in an urban centre for each kilometer of distance greater than 15 kilometers from a **school** located within the city boundary (city limits) by the most direct route to the Central Administration Office of the **school jurisdiction**.

If a **school** of a **school jurisdiction** in an urban centre is located outside the city boundary (city limits) then funding is provided for each kilometer of distance greater than 25 kilometers from the **school** outside the city boundary to the Central Administration Office of the **school jurisdiction**.

4. Funding is provided to a **school jurisdiction** not in an urban centre for each kilometer of distance greater than 25 kilometers of distance from a **school** by the most direct route to the Central Administrative Office of the **school jurisdiction**.
5. Distance is electronically measured over the most direct route by way of a primary highway as shown on the current digitized map of the **school jurisdiction**. If a **school**, or if the Central Administration Office of a **school jurisdiction** is not on a primary highway, then the shortest route on a secondary road including a city street is used.
6. Students enrolled in **Home Education**, **On-Line**, and **Institutional** programs and Hutterite Colony Schools are not counted for funding under this section.

**DOCUMENTATION AND REPORTING REQUIREMENTS**

1. Student registration information for **funded children** and **funded students** as of the **count date** of the current school year that is submitted to the Information Services Branch by October 5.
2. **School jurisdictions** are not required to apply for funding under this section. School Finance will determine the funding allocation for **school jurisdictions**.



## ALLOCATION DESCRIPTION

**New**

This funding, which is in addition to Base Instruction funding, is provided to address the differential costs associated with enrollment increases at the jurisdiction and/or **school level**. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

## ALLOCATION FORMULA

Enrollment Growth Allocation is the sum of the results of a) and b) below:

- a) The following formula is used to determine the allocation for the **school jurisdiction**.

$$\text{School Jurisdiction Level Allocation} = \left\{ \begin{array}{l} \% \text{Enrollment Growth this year over the prior year} \\ - 4\% \end{array} \right\} \times \left\{ \begin{array}{l} \# \text{of FTE funded children from the prior year} \\ + \# \text{of funded students from the prior year} \end{array} \right\} \times \text{Enrollment Growth Rate}$$

AND,

- b) The following formula is used to determine the allocation for each **school**. The sum of the results for each eligible **school** equals the total **School Level Allocation** for the jurisdiction.

$$\text{School Level Allocation (for each eligible school)} = \left\{ \begin{array}{l} \% \text{Enrollment Growth this year over the prior year} \\ - 7\% \end{array} \right\} \times \left\{ \begin{array}{l} \# \text{of FTE funded children from the prior year} \\ + \# \text{of funded students from the prior year} \end{array} \right\} \times \text{Enrollment Growth Rate}$$

## ALLOCATION CRITERIA

1. Enrollment growth funding is based on the percentage increase in funded enrollment (in excess of the threshold level) from the prior school year and is determined by using the number of **funded children** counted at 0.5 full-time equivalent and the number of **funded students**.
2. **School jurisdictions** experiencing enrollment growth at the jurisdiction level of greater than 4% from year-to-year are eligible for **school jurisdiction** level funding.

3. **School jurisdictions** with individual **schools** experiencing enrollment growth of greater than 7% from year-to-year are eligible for **school** level funding. For determining enrollment growth in Hutterite Colony schools, the sum of the enrollments of all of the Hutterite Colony schools located in a **school jurisdiction** will be treated as one **school** enrollment (e.g. if there are 10 Hutterite Colony schools in a **school jurisdiction** these 10 **schools** will be considered one **school**).
4. Enrollment growth funding is not provided for in-year enrollment growth at either the **school jurisdiction** level or at the **school** level. In-year enrollment growth in grades 10 to 12 is provided through CEU funding.
5. Enrollment growth funding is provided for a new **school** that begins operating on or before the **count date**. If circumstances prohibit the **school** from beginning operation on or before the **count date**, the Director of School Finance may consider approval of another **count date** for enrollment growth funding. School level enrollment growth funding will not be provided for schools transferred from one school authority to another.
6. Enrollment growth funding is provided for enrollment growth resulting from an expanded program that is implemented on or before the **count date**.
7. Enrollment growth funding is one-time in nature. Growth is determined on a year-to-year basis and involves the enrollments of the current year and the immediate preceding year. School Finance may review enrollment growth reported by **school jurisdictions** for reasonableness.
8. **Charter schools** will be treated as **school jurisdictions** and will qualify for enrollment growth funding only at the jurisdiction level.
9. For determining enrollment growth in **schools** that share a physical address with another **school(s)**, the sum of the enrollments of all **schools** that share that address will be treated as one **school** enrollment.
10. Students enrolled in Home education, and **on-line programs** are not counted for **school jurisdiction** enrollment growth funding under this section.
11. Students enrolled in Home education, **Outreach programs** and **on-line programs** are not counted for **school** enrollment growth funding under this section.

## DOCUMENTATION AND REPORTING REQUIREMENTS

1. Student registration information for **funded children** and **funded students** as of the **count date** of the current **school** year and the immediate preceding year submitted to the Information Services Branch by October 5.
2. **School jurisdictions** are not required to apply for funding under this section. School Finance will determine the funding allocation for **school jurisdictions**.

## ALLOCATION DESCRIPTION

**New**

This funding, which is in addition to Base Instruction funding, is provided to address the costs associated with transitioning to lower enrollments at the jurisdiction and/or school level. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

## ALLOCATION FORMULA

Enrollment Decline Allocation is the sum of the result of a) and b) below:

- a) The following formula is used to determine the allocation for the **school jurisdiction**.

$$\text{School Jurisdiction Level Allocation} = \left\{ \begin{array}{l} \% \text{Enrollment} \\ \text{Decline from} \\ \text{the prior} \\ \text{year to the} \\ \text{current yr} \end{array} \right\} - 1.5\% \times \left\{ \begin{array}{l} \# \text{of FTE} \\ \text{funded} \\ \text{children} \\ \text{from the} \\ \text{prior} \\ \text{year} \end{array} \right\} + \left\{ \begin{array}{l} \# \text{of} \\ \text{funded} \\ \text{students} \\ \text{from the} \\ \text{prior year} \end{array} \right\} \times \text{Enrollment Decline Rate}$$

AND,

- b) The following formula is used to determine the allocation for each **school**. The sum of the result for each eligible **school** equals the total **School Level Allocation** for the jurisdiction.

$$\text{School Level Allocation} = \left\{ \begin{array}{l} \% \text{Enrollment} \\ \text{Decline from} \\ \text{the prior} \\ \text{year to the} \\ \text{current year} \end{array} \right\} - 4\% \times \left\{ \begin{array}{l} \# \text{of FTE} \\ \text{funded} \\ \text{children} \\ \text{from the} \\ \text{prior} \\ \text{year} \end{array} \right\} + \left\{ \begin{array}{l} \# \text{of} \\ \text{funded} \\ \text{students} \\ \text{from the} \\ \text{prior year} \end{array} \right\} \times \text{Enrollment Decline Rate}$$

## ALLOCATION CRITERIA

- Enrollment decline funding is based on the percentage decrease in funded enrollment (in excess of the threshold level) from the prior school year and is determined by using the number of FTE **funded children** counted at 0.5 full-time equivalent and the number of **funded students**.
- School jurisdictions** experiencing enrollment decline from year-to-year at the jurisdiction level of greater than 1.5% are eligible for **school jurisdiction** level funding.

3. **School jurisdictions** with individual **schools** experiencing natural enrollment decline from year-to-year of greater than 4% are eligible for funding. These enrollment decreases will be evaluated annually for eligibility on a **school by school** basis by the Director of School Finance. For determining enrollment decline in Hutterite Colony schools the sum of the enrollments in all Hutterite Colony schools located in a **school jurisdiction** will be treated as one **school** enrollment (e.g. if there are 10 Hutterite Colony schools in a **school jurisdiction** these 10 **schools** will be considered one **school**).
4. Enrollment decline funding will not be provided for enrollment decreases resulting from a new **school** facility beginning operation or from program expansion relocations being implemented within the **school jurisdiction**, which has caused a decline in a particular **school**.
5. Enrollment decline funding is not provided for in-year enrollment decreases.
6. Enrollment decline funding is not provided in **school** closure situations.
7. Enrollment decline funding is one-time in nature since these enrollment decreases are determined on a year-to-year basis and involve the current year and the immediate preceding year enrollments. Enrollment decline attributable to a program being moved from one **school** to another does not qualify. School Finance may review enrollment decline reported by **school jurisdictions** for reasonableness.
8. Students enrolled in Home education, and **on-line programs**, are not counted for **school jurisdiction** enrollment decline funding under this section.
9. **Charter schools** will be treated as **school jurisdictions** and will qualify for Enrollment Decline funding only at the jurisdiction level.
10. For determining enrollment decline in **schools** that share a physical address with another **school(s)**, the sum of the enrollments of all **schools** that share that address will be treated as one **school** enrollment.
11. Students enrolled in Home education, **Outreach programs**, and **on-line programs** are not counted for **school** enrollment decline funding under this section.

## DOCUMENTATION AND REPORTING REQUIREMENTS

1. Student registration information for **funded children** and **funded students** as of the **count date** of the current school year and the immediate preceding school year submitted to the Information Services Branch by October 5.
2. **School jurisdictions** are not required to apply for funding under this section. School Finance will determine the funding allocation for **school jurisdictions**.

## **ALLOCATION DESCRIPTION**

**New**

This funding, which is in addition to Base Instruction funding, is provided to address the costs associated with providing a low student enrollment base to meet their administrative needs. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

## **ALLOCATION FORMULA**

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

Small Board  
Administration Allocation = a) \$424,483 for a **school jurisdiction** (excluding **charter schools**) with FTE funded enrollment of 2,000 students or less

**OR**

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

$$\$424,483 - \left[ \$424.48 \times \left\{ \frac{\text{FTE Funded enrollment}}{2,000} \right\} \right]$$

**Revised**

**OR**

c) \$58,366 for a **charter school** (for each site up to a maximum of four sites).

**School jurisdictions** (excluding **charter schools**) with FTE funded enrollments of 3,000 or more students do not qualify for this funding.

## **ALLOCATION CRITERIA**

1. FTE Funded Enrollment in each of the calculations above is determined by adding the number of **funded children** counted at 0.5 full-time equivalent and the number of **funded students** that is equal to the **funded student** head count.

## **DOCUMENTATION AND REPORTING REQUIREMENTS**

1. Student registration information for **funded children** and **funded students** as of the **count date** of the current school year that is submitted to the Information Services Branch by October 5.
2. **School jurisdictions** are not required to apply for funding under this section. School Finance will determine the funding allocation for **school jurisdictions**.
3. Students enrolled in Home Education are not counted for funding under this section.

## **ALLOCATION DESCRIPTION**

**New**

This funding, which is in addition to Base Instruction funding, is provided to address the costs associated with providing services in northern Alberta. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

## **ALLOCATION FORMULA**

$$\begin{aligned} \text{Northern Allowance Allocation} = & \left\{ \begin{array}{l} \text{Lower Zone} \\ \text{FTE funded} \\ \text{enrollment*} \end{array} \right\} \times \left\{ \begin{array}{l} \text{Lower} \\ \text{Zone} \\ \text{Rate*} \end{array} \right\} + \left\{ \begin{array}{l} \text{Intermediate} \\ \text{Zone FTE funded} \\ \text{enrollment*} \end{array} \right\} \times \left\{ \begin{array}{l} \text{Intermediate} \\ \text{Zone Rate*} \end{array} \right\} + \\ & \left\{ \begin{array}{l} \text{Upper Zone} \\ \text{FTE funded} \\ \text{enrollment*} \end{array} \right\} \times \left\{ \begin{array}{l} \text{Upper} \\ \text{Zone} \\ \text{Rate*} \end{array} \right\} \end{aligned}$$

\*FTE funded enrollment for the purpose of this section means the number of eligible **funded children** counted at 0.5 full-time equivalent and the number of **funded students** that is equal to the **funded student** head count in the **school** located in the applicable zone.

## **ALLOCATION CRITERIA**

1. Northern allowance funding is provided to a **school jurisdiction** based on the \*FTE funded enrollment of all **schools** located in their respective zones.
2. Zones are described as follows:
  - a) Lower Zone – **schools** located between the 55<sup>th</sup> and 56<sup>th</sup> parallels of latitude, e.g. Grande Prairie, High Prairie and Slave Lake.
  - b) Intermediate Zone – **schools** located between the 56<sup>th</sup> and 57<sup>th</sup> parallels of latitude, e.g. Peace River, Fort McMurray and Manning.
  - c) Upper Zone – **schools** located north of the 57<sup>th</sup> parallel of latitude, e.g. Fort Vermilion, High Level and Zama City.
3. The zone in which a **school** is located is determined from the legal land description of the physical location of the **school**.
4. Students enrolled in Home Education, **On-line programs** and Hutterite Colony schools are not eligible for funding under this section.

**DOCUMENTATION AND REPORTING REQUIREMENTS**

1. Student registration information for **funded children** and **funded students** as of the **count date** of the current school year that is submitted to the Information Services Branch by October 5.
2. **School jurisdictions** are not required to apply for funding under this section. School Finance will determine the funding allocation for **school jurisdictions**.

**RELATIVE COST OF PURCHASING GOODS AND  
SERVICES ADJUSTMENT (RCPA) FUNDING**

**ALLOCATION DESCRIPTION**

**New**

This funding, which is in addition to Base Instruction funding, is provided to **school jurisdictions** to address the varying cost of purchasing local goods and services. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

**ALLOCATION FORMULA**

$$\text{RCPA Allocation} = \left\{ 20\% \times \left\{ \begin{array}{l} \text{Total Eligible Funding to a} \\ \text{school jurisdiction, with} \\ \text{the exclusions listed} \\ \text{below} \end{array} \right\} + \left\{ 47\% \times \left\{ \begin{array}{l} \text{Transportation} \\ \text{and Boarding} \\ \text{funding} \end{array} \right\} \right\} \times \left\{ \begin{array}{l} \text{RCPA Adjustment} \\ \text{Factor} \\ \text{(Jurisdiction RCPA} \\ \text{Index} - 1.0) \end{array} \right\}$$

**ALLOCATION CRITERIA**

**Revised**

1. 20% is applied to the Total Eligible funding provided by Alberta Education to a school jurisdiction in a school year and adjusted by the RCPA Adjustment Factor. This factor is determined by taking the Jurisdiction RCPA Index and subtracting 1.0. Total Eligible funding for this purpose does not include Provincial Priority Targeted funding (Part 5 of the Manual), Stabilization funding, Transportation and Boarding funding (ECS to Grade 12), and Plant Operations and Maintenance funding, Fuel Price Contingency, and Capital funding.
2. 47% is applied to all Transportation and Boarding funding (ECS to Grade 12), provided by Alberta Education to a **school jurisdiction** for a school year and adjusted by the RCPA Adjustment Factor.
3. The RCPA Adjustment factor is determined from the spatial price index developed by Alberta Economic Development and may be adjusted as required. See item #2 under ADDITIONAL INFORMATION, below.
4. The index will have a minimum value of 1.0 for all **school jurisdictions** to ensure that a **school jurisdiction** will not lose funding under the RCPA formula.
5. The **school jurisdictions** in the City of Red Deer will have a constant index value of 1.0, with the city of Red Deer considered the bench mark centre.

**DOCUMENTATION AND REPORTING REQUIREMENTS**

1. **School jurisdictions** are not required to apply for funding under this section. School Finance will determine the funding allocation for **school jurisdictions**.



**ADDITIONAL INFORMATION**

1. The RCPA Adjustment Factor is determined by taking the Jurisdiction RCPA Index number as indicated in the table below and subtracting 1.0: This data will be reviewed regularly and adjusted accordingly in the Funding Manual.

<b>JURISDICTION NAME</b>	<b>JURISDICTION RCPA INDEX</b>
Almadina School Society	1.075
Aspen View Regional Division No. 19	1.028
Aurora School Ltd.	1.024
Battle River Regional Division No. 31	1.011
Black Gold Regional Division No. 18	1.019
Boyle Street Education Centre	1.024
Buffalo Trail Public Schools Regional Division No. 28	1.005
Calgary Arts Academy Society	1.075
Calgary Girls' School Society	1.075
Calgary Roman Catholic Separate School District No. 1	1.075
Calgary School District No. 19	1.075
Calgary Science School Society	1.075
Canadian Rockies Regional Division No. 12	1.230
CAPE – Centre for Academic and Personal Excellence Institute	1.000
Chinook's Edge School Division No. 73	1.000
Christ the Redeemer Catholic Separate Regional Division No. 3	1.032
Clearview School Division No. 71	1.000
East Central Alberta Catholic Separate Schools Regional Division No. 16	1.000
East Central Francophone Education Region No. 3	1.000
Edmonton Catholic Separate School District No. 7	1.024
Edmonton School District No.7	1.024
Elk Island Catholic Separate Regional Division No. 41	1.021
Elk Island Public Schools Regional Division No. 14	1.022
Evergreen Catholic Separate Regional Division No. 2	1.021
Foothills School Division No. 38	1.022
Fort McMurray Roman Catholic Separate School District No. 32	1.118
Fort McMurray School District No. 2833	1.118
Fort Vermilion School Division No .52	1.034
Foundations for the Future Charter Academy Charter School Society	1.075
Golden Hills School Division No. 75	1.036
Grande Prairie Roman Catholic Separate School District No. 28	1.027
Grande Prairie School District No. 2357	1.027
Grande Yellowhead Regional Division No. 35	1.051
Grasslands Regional Division No. 6	1.022
Greater North Central Francophone Education Region No. 2	1.029
Greater Southern Public Francophone Education Region No. 4	1.054
Greater Southern Separate Catholic Francophone Education Region No. 4	1.081
Greater St. Albert Catholic Regional Division No. 29	1.023
High Prairie School Division No. 48	1.049
Holy Family Catholic Regional Division No. 37	1.032
Holy Spirit Roman Catholic Separate Regional Division No. 4	1.001
Horizon School Division No. 67	1.001

JURISDICTION NAME	JURISDICTION RCPA INDEX
Lakeland Roman Catholic Separate School District No. 150	1.000
Lethbridge School District No. 51	1.000
Living Waters Catholic Regional Division No. 42	1.031
Livingstone Range School Division No. 68	1.008
Lloydminster Public School Division	1.026
Lloydminster Roman Catholic Separate School Division	1.026
Medicine Hat Catholic Separate Regional Division No. 20	1.000
Medicine Hat School District No. 76	1.000
Moberly Hall School Society	1.118
Mother Earth's Children's Charter School Society	1.024
New Horizons Charter School Society	1.024
Northern Gateway Regional Division No. 10	1.003
Northern Lights School Division No. 69	1.012
Northland School Division No. 61	1.050
Northwest Francophone Education Region No. 1	1.033
Palliser Regional Division No. 26	1.004
Parkland School Division No. 70	1.022
Peace River School Division No. 10	1.030
Peace Wapiti School Division No. 76	1.027
Pembina Hills Regional Division No. 7	1.000
Prairie Land Regional Division No. 25	1.001
Prairie Rose School Division No. 8	1.000
Red Deer Catholic Regional Division No. 39	1.000
Red Deer School District No. 104	1.000
Rocky View School Division No. 41	1.070
St. Albert Protestant Separate School District No. 6	1.024
St. Paul Education Regional Division No. 1	1.000
St. Thomas Aquinas Roman Catholic Separate Regional Division No. 38	1.012
Sturgeon School Division No. 24	1.021
Suzuki Charter School Society	1.024
Westmount Charter School Society	1.075
Westwind School Division No. 74	1.001
Wetaskiwin Regional Division No. 11	1.011
Wild Rose School Division No. 66	1.000
Wolf Creek School Division No. 72	1.000

## **ALLOCATION DESCRIPTION**

**New**

This funding is provided to address boarding costs for eligible **funded students** who are directed to an educational program that requires the student to live away from home. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

## **ALLOCATION FORMULA**

Boarding Allocation      =      Number of **funded students** eligible for Boarding      **X**      Funding Rate

## **ALLOCATION CRITERIA**

1. A **school jurisdiction** may receive boarding funding for eligible **funded students** whose **parent(s)** reside in the **school jurisdiction** if a student is directed by the **board** to attend a **school** that requires the student to live away from home.
2. Funding for boarding is not paid to a **school jurisdiction** for a **resident student** who is:
  - a) attending an **accredited-funded private school** or a **school** of a jurisdiction where the student has been placed by a **parent** without the direction of the **school jurisdiction**, or
  - b) attending a **private school** outside Alberta when the education program has not been previously approved by the **Minister**, or
  - c) maintained in a temporary residence to attend extra-curricular courses.
  - d) enrolled after the **count date**.

## **DOCUMENTATION AND REPORTING REQUIREMENTS**

1. Payment is made on the basis of information reported on the Rural and Urban Transportation claims submitted to Financial Reporting and Accountability Branch by November 30.
2. Only funded students enrolled on the **count date** are eligible for this funding.

## **ALLOCATION DESCRIPTION**

**New**

This funding is provided to rural **school jurisdictions** to address the costs associated with providing to provide efficient transportation for **eligible passengers/eligible transported ECS children**. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

## **ALLOCATION FORMULA**

1. A **board** of a **rural district** which is providing transportation services may receive the following rural transportation funding for each transportation year:

### **a) Rural Transportation Support**

$$\begin{array}{llll}
 \text{i) Density Support} & = & \begin{array}{l} \text{Applicable Annual} \\ \text{Density Rate per } \mathbf{Eligible} \\ \mathbf{Passenger/Eligible} \\ \mathbf{Transported ECS Child} \end{array} & \times & \begin{array}{l} \text{Applicable} \\ \text{Weighting} \\ \text{Factor} \end{array} & \times & \begin{array}{l} \mathbf{Eligible} \\ \mathbf{Passenger/Eligible} \\ \mathbf{Transported ECS Child} \end{array} \\
 \text{ii) Distance Support} & = & \begin{array}{l} \text{Applicable Annual} \\ \text{Distance Rate} \end{array} & \times & \begin{array}{l} \text{Applicable Eligible Transportation Distance} \\ \text{(kms) for each } \mathbf{Eligible Passenger/Eligible} \\ \mathbf{Transported ECS Child} \end{array}
 \end{array}$$

Total rural transportation support is the aggregate of the amounts calculated for each **eligible passenger** and **eligible transported ECS child** in i) and ii) above.

### **b) Inter-School Transportation Support**

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

$$\begin{array}{llll}
 \text{Inter-School Support} & = & \begin{array}{l} \text{Daily km's of Inter-} \\ \text{School Transportation for} \\ \text{the bus} \end{array} & \times & \begin{array}{l} \text{Number of Days of Inter-} \\ \text{School Transportation in} \\ \text{the school year for the} \\ \text{bus} \end{array} & \times & \begin{array}{l} \text{Support} \\ \text{Rate} \end{array}
 \end{array}$$

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 **eligible passengers/eligible transported ECS children** who are non-resident students (transported under agreement) to a **school** of the **board**, or to another **school authority**, are eligible for the following funding incentive:

Number of <b>eligible passengers/eligible transported ECS children</b> who are non-resident transported under agreement	<b>X</b>	50% of the transporting <b>board's</b> density rate
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d) **Bus Modification or Purchase Allowance to Accommodate Wheelchair Passengers**

Refer to Section 1.21, Special Transportation

**ALLOCATION CRITERIA**

1. Where a **board** of a **rural district** has under its jurisdiction or transports an **eligible passenger** or **eligible transported ECS child** of a city, town, village or hamlet with a population greater than 10,000, the **board** may be funded for each **eligible passenger** and for each **eligible transported ECS child** residing within those boundaries. These students cannot be included as **eligible passengers** under the Rural Transportation formula, but are claimed under Section 1.20 Urban Transportation Funding. A **board** of a **rural district** claiming both urban and rural transportation funding must have received prior approval from the **Minister**. Applications for approval should be submitted to the Financial Reporting and Accountability Branch.

Where a **board** of a **rural district** has under its jurisdiction a city, town, village or hamlet with a population of 10,000 or fewer and transports an **eligible passenger** or **eligible transported ECS child** residing within those boundaries to a **school** of a program listed under Allocation Criteria #3 of this section outside those boundaries, the **board** may be reimbursed for each **eligible passenger** and for each transported ECS child under the Rural Transportation formula. These students may not be included as **eligible passengers** under the Urban Transportation formula.

Where the net support for student transportation of a **board** decreases in excess of 3% as a result of a community population reaching 10,000, an adjustment will be determined for that jurisdiction based on the amount greater than 3% decrease.

Where the net support for student transportation of a rural **board** decreases in excess of 3% as a result of movement between **density** grid columns, an adjustment may be determined for that jurisdiction based on the amount greater than 3%.

2. Rural Transportation Funding:

- a) 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.
- b) 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** or 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.
- c) If a **resident student** of a **board** is transported by the **board** to a **school** of the **parent's** choice outside the attendance area or transportation service area (as defined in the *Student Transportation Regulation*) of the **designated school** for the student, only **density** support and **distance** support to the nearest **school** may be claimed for that student if he or she is an **eligible passenger**. Where a **board** has adopted over-lapping **school** attendance or transportation service areas, **density** support and **distance** support to the **school** nearest the student's residence may be claimed.
- d) In the case of 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 authorities**, 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.
- e) If a **board** is providing transportation services under an agreement with another **board** and the two **boards** are not sharing a co-terminus area, the area of the **board** receiving transportation services may be added to the transporting **board's** area for determining the **density** rating for the transporting **board**.
- f) Rural transportation funding under this section is available only to **boards** operating student transportation systems. A **board** accessing transportation services for its **resident students** through **educational services agreements** or **transportation agreements** is not eligible for rural transportation funding under this section.

- g) Notwithstanding subsection (f), a **board** transporting an **eligible passenger** of another **board** under a **transportation agreement** to the **designated school** of that **resident board**, who resides outside the transportation service area of the resident **board** and accesses the bus route of the **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**. The **resident board** may claim only the **distance** support from the residence of the student to the point where the student accesses the bus route for the **designated school**, at the distance rate received by the transporting **board**.
- h) **Eligible passengers** with severe disabilities who ride on a regular **school bus** route will be claimed under this section using the density and distance formula and are not eligible for funding under Section 1.21, Special Transportation.
- i) Special routes designated only for the transportation of those **students and children with a disability/delay** who, because of the severity of their disability/delay, are unable to ride on a regular **school bus** route may be claimed under this section using the **density** and **distance** formula or under Section 1.21, Special Transportation. (NOTE: all students on a special route must be claimed under the same section.)
- j) 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 (2) of the *School Act*.
- b) A **school jurisdiction** providing transportation to and from an **ECS program** may charge the **parent** of a **child** a fee for the transportation service. The total amount of fees charged to ECS **parents** for transportation services shall not exceed the total cost of the provision of ECS transportation services less the ECS transportation funding received from Alberta Education.
- c) Each **eligible transported ECS child** transported will be counted as 1.0 weighted passenger in determining rural transportation funding support.
- d) 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 an agreement with the other **board**, **private school**, or **private ECS operator**.

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:
  - the course of study is prescribed or approved by the **Minister** under the *School Act*, Section 39 (1);
  - the course of study requires a special **school** facility or equipment not available at the **school** of daily attendance for those students; and
  - the course of study requires the use of the special **school** facility or equipment for at least 18 consecutive weeks.
- b) Work Experience programs, recreational programs, and intermittent bussing to such activities as swimming programs are not eligible for inter-school transportation support.

5. Funding shall not be paid under this section for a **funded student** or a **funded child** who is counted under the Special Transportation funding (Section 1.21).

6. Transportation support shall be paid based on the distance from the student's residence to the **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 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:

Revised

Updated

- **Alternative French language programs** (including French immersion and bilingual programs) and **other language immersion programs**;
- Special Education programs to meet the needs of **students with severe disabilities**;
- Special Education programs to meet the need of students with mild or moderate disabilities when **board** criteria have been met;
- 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).

Revised

7. Students in an **On-Line program** or an **Outreach program** -where they are accessing 50% 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.



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**DOCUMENTATION AND REPORTING REQUIREMENTS**

1. Rural **school jurisdictions** are required to submit electronically a “RURAL CLAIM” to the Financial Reporting and Accountability Branch by November 30. Payment is made on the basis of the submitted information, the Rural Transportation Allocation Criteria and funding rates, and in accordance with the *School Act* and the *Student Transportation Regulation, A.R. 250/1998; amended A.R. 197/2000*.

Note that the 2006/2007 “RURAL CLAIM” will now include the Rural Special Transportation section in the claim form; please refer to Section 1.21 Special Transportation for Rural Special Transportation Allocation Criteria and funding rates.

2. Transportation support payments for each new school year will be paid at 100% 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 on December 31 the January payment will be reduced to 75% 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 **count date** are eligible for funding. Special consideration for the **count date** may be given to **school jurisdictions** experiencing exceptional growth in transportation needs.
4. The **effective transportation area** of a **school jurisdiction** for purposes of calculating **density** support is the **effective transportation area** of the **school jurisdiction** as of the **count date** in a given year.
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. Items a), b), c), and d) should be kept in an electronic file and made available to Alberta Education either electronically or on a computer disc.
  - a) electronic 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) maps of individual bus routes;
  - 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 current vehicle inspection certificates issued under the *Safety Traffic Act*; and

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

#### ADDITIONAL INFORMATION

1. **First Nations students who reside on a reserve** shall not be counted as **eligible passengers**.
2. **School jurisdictions** may also qualify for Relative Cost of Purchasing Goods and Services Adjustment (RCPA) funding for transportation services. Please see details in Section 1.17.

## ALLOCATION DESCRIPTION

**New**

This funding is provided to urban **school jurisdictions** to address the costs associated with providing efficient transportation for **eligible passengers/eligible transported ECS children**. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

## ALLOCATION FORMULA

### 1. Urban District transportation:

$$\text{Urban Transportation Allocation} = \left\{ \begin{array}{l} \text{Eligible passengers} \\ \text{Gr. 1-12} \end{array} + \begin{array}{l} \text{Eligible transported ECS} \\ \text{children} \end{array} \right\} \times \text{Urban Transportation Rate}$$

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.

### 2. Francophone Authorities within an Urban Area:

Transportation funding to a Francophone Education Program recognizes the dispersion of students for a Francophone Authority.

$$\text{Francophone Urban Transportation Allocation} = \left\{ \begin{array}{l} \text{Francophone eligible passengers} \\ \text{Gr. 1-12} \end{array} + \begin{array}{l} \text{Francophone eligible transported ECS children} \end{array} \right\} \times 3.5 \text{ (weighting factor)} \times \text{Urban Transportation Rate}$$

### 3. Inter-School Transportation Support:

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

$$\text{Inter-School Support} = \begin{array}{l} \text{Daily km's of} \\ \text{Inter-school} \\ \text{Transportation for} \\ \text{the bus} \end{array} \times \begin{array}{l} \text{Number of days of} \\ \text{Inter-school} \\ \text{Transportation in} \\ \text{the school year for} \\ \text{the bus} \end{array} \times \text{Support Rate}$$

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

**ALLOCATION CRITERIA**

1. A **school jurisdiction** that is an **urban district** or **division** may receive urban transportation funding for each **eligible passenger** and each **eligible transported ECS child**.
2. For an **eligible passenger** or **eligible transported ECS child** of a city, town, village or hamlet with a population of:
  - 10,000 or fewer, refer to Section 1.19;
  - between 10,000 and 19,999, the rate applicable is the lowest density funding rate provided to rural **school jurisdictions**;
  - between 20,000 and 29,999, the rate applicable is the mid-point between the above two rates (i.e. the lowest rural density funding rate and the urban transportation rate);
  - 30,000 or greater, the rate applicable is the urban transportation rate;
3. An **urban district** 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.
4. If an **urban district** 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.
5. An **urban district** 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*.
6. An **urban district** 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.
7. An **eligible passenger** or an **eligible transported ECS child** can only be counted once under this section.
8. Funding is not provided for transporting students or ECS children between **schools**.
9. Where a **board** has adopted over-lapping **school** attendance or transportation service areas, eligibility for funding under this section is determined by the **distance** to the **school** nearest the student's residence.

10. If a **resident student** of an **urban district** 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.
11. If a **board** of an **urban district** or **division** 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 enrollment 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 with 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.
12. Where the **board** of an **urban district** has a rural area under its jurisdiction and is providing transportation services in that area, the **school jurisdiction** may receive funding under the Rural Transportation formula for each **eligible passenger** and each **eligible transported ECS child** residing in the rural area. A **school jurisdiction** claiming both urban and rural transportation must have received prior approval from the **Minister**. Requests for approval should be submitted to the Financial Reporting & Accountability Branch.
13. To recognize the dispersion of students for a Francophone authority within an **urban district** a weighted factor of 3.5 will be used for Francophone **eligible passengers** (Grades 1-12) and Francophone **eligible transported ECS children**.
14. **Eligible passengers** with severe disabilities who ride on a regular **school bus** route will be claimed under this section using the urban transportation rate and are not eligible for funding under Section 1.21, Special Transportation.

Special routes designated only for the transportation of those **students and children with a disability/delay** who cannot, because of the severity of their disability/delay, ride a regular **school bus** route may be claimed under Section 1.21, Special Transportation. (NOTE: all students on a special route must be claimed under the same section.)

15. Transportation finding shall be paid 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.

**Revised** If the student is directed by the board to attend another school for any of the following considerations and the 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:

**Updated**

- **Alternative French language programs** (includes French Immersion and bilingual programs) and **other language immersion programs**;
- Special Education programs to meet the needs of **students with severe disabilities**;
- Special Education programs to meet the needs of students with mild or moderate disabilities, when **board** criteria have been met;
- 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).

**Revised**

16. Students in an **On-Line program** or an **Outreach program** -where they are accessing 50% 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.
17. 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:
    - the course of study is prescribed or approved by the **Minister** under the *School Act*, Section 39 (1);
    - the course of study requires a special **school** facility or equipment not available at the **school** of daily attendance for those students; and
    - the course of study requires the use of the special **school** facility or equipment for a least 18 consecutive weeks.
  - b) Work Experience programs, recreational programs, and intermittent bussing to such activities as swimming programs are not eligible for inter-school transportation support.

## DOCUMENTATION AND REPORTING REQUIREMENTS

1. **Urban districts** are required to submit electronically an "URBAN CLAIM" to the Financial Reporting and Accountability Branch by November 30. Payment is made on the basis of this submitted information, Urban Transportation Allocation Criteria and funding rates, and in accordance with the *School Act* and the *Student Transportation Regulation, A.R. 250/1998; amended A.R. 197/2000*.

Note that the 2006/2007 "URBAN CLAIM" will now include the Urban Special Transportation section on the claim form; please refer to Section 1.21 Special Transportation for Urban Special Transportation Allocation Criteria and funding rates.

2. Transportation support payments for each new school year will be paid at 100% 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 on December 31, the January payment will be reduced to 75% 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 **count date** are eligible for funding. Special consideration for the **count date** may be given to **school jurisdictions** experiencing exceptional growth in transportation needs.
4. Urban transportation funding is calculated by multiplying the number of **eligible passengers** and **eligible transported ECS children** by the urban transportation rate.
5. 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** under the Urban Transportation formula.
6. **Urban districts** 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. Items a), b), c), and d) should be kept in an electronic file and made available to Alberta Education either electronically or on a computer disc:
  - a) electronic geographic roadway maps of overall attendance areas and transportation service areas;
  - b) location of each student's residence (street addresses in town, villages and hamlets);
  - c) maps of individual bus routes;
  - 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, charter schools** and **private ECS operators**;
  - h) copies of current vehicle inspection certificates issued under the *Highway Traffic Act*; and
  - i) copies of contracts with:
    - (i) operators of contracted **school busses** for regular transportation;
    - (ii) **parents** providing transportation showing amounts paid.

#### ADDITIONAL INFORMATION

1. **First Nations students who reside on a reserve** shall not be counted as **eligible passengers**.
2. **School jurisdictions** may also qualify for Relative Cost of Purchasing Goods and Services Adjustment (RCPA) funding for transportation services. Please see details in Section 1.17.

## ALLOCATION DESCRIPTION

**New**

This funding is provided to rural, urban and metro **school jurisdictions** to address the costs associated with providing appropriate and efficient transportation for **children with a disability/delay** and **students with a disability**. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

## ALLOCATION FORMULA

1. a) Special Transportation:

$$\begin{aligned} \text{Special Transportation Allocation} &= \left\{ \begin{array}{l} \text{Number of } \mathbf{\text{students with a}} \\ \mathbf{\text{disability}} \text{ transported (see} \\ \text{Allocation Criteria \#1)} \end{array} \right\} \times \left\{ \begin{array}{l} \text{Applicable special rate} \\ \text{(urban or rural) per} \\ \mathbf{\text{student with a}} \\ \mathbf{\text{disability}} \end{array} \right\} + \\ &\quad \left\{ \begin{array}{l} \text{Number of ECS } \mathbf{\text{children}} \\ \mathbf{\text{with a disability/delay}} \\ \text{transported (see Allocation} \\ \text{Criteria \#1)} \end{array} \right\} \times \left\{ \begin{array}{l} \text{Number of days} \\ \text{transported} \end{array} \right\} \times \left\{ \begin{array}{l} \text{Rate per} \\ \text{round} \\ \text{trip} \end{array} \right\} \end{aligned}$$

b) Weekend Transportation

$$\begin{aligned} \text{Weekend Transportation Allocation} &= \left\{ \begin{array}{l} \text{Number of } \mathbf{\text{students with a}} \\ \mathbf{\text{disability}} \text{ transported on a} \\ \text{weekend} \end{array} \right\} \times \left\{ \begin{array}{l} \text{Weekend} \\ \text{Transportation Rate} \end{array} \right\} \end{aligned}$$

c) **Family-Oriented ECS Programming** Transportation

$$\begin{aligned} \text{Family-oriented ECS programming Transportation Allocation} &= \left\{ \begin{array}{l} \text{Number of scheduled } \mathbf{\text{family-}} \\ \mathbf{\text{oriented ECS programming}} \\ \text{sessions for } \mathbf{\text{children with a}} \\ \mathbf{\text{severe disability/delay}} \\ \text{(minimum 4 and maximum 36)} \end{array} \right\} \times \left\{ \begin{array}{l} \text{Rate per Round Trip} \end{array} \right\} \end{aligned}$$



- d) Bus Modification or Purchase Allowance to Accommodate Wheelchair Passengers:

**Revised**

Funding is provided to **school jurisdictions** for up to 100% 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, Financial Reporting and Accountability Branch, is required. Invoices and proof of payment must be submitted to Financial Reporting and Accountability Branch for reimbursement.

**ALLOCATION CRITERIA**

1. Urban or rural **school jurisdictions** may receive special transportation funding for **students** and **children with a disability/delay** riding on a special route designated only for the transportation of those **students** and **children with a disability/delay** who cannot, because of the severity of their disability/delay, use the transportation services described in Sections 1.19, 1.20, or 1.22 of this manual. The metro urban **school jurisdictions** (Edmonton and Calgary) are eligible for ECS Special Transportation funding under this section. (NOTE: all students on a special route must be claimed under the same section.)
2. Special Transportation funding is also provided for **children with special needs** who, because of their young age, are not able to ride regular transportation. This includes **children with a severe disability/delay** (ages 2.5 to 4.5 years), and **children with a mild or moderate disability/delay** and **funded children** who are gifted and talented (ages 3.5 to 4.5 years).
3. Program or **school** location shall not be considered when determining eligibility for this funding.
4. Special Transportation funding is provided for **children with a disability/delay** and **students with a disability** who require special transportation between their residences or boarding places (boarding refers only to **students with a disability**) and:
  - a) the **school** of a **school jurisdiction**;
  - b) an **accredited-funded private school**;
  - c) a **private ECS operator**; or
  - d) 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. Weekend Transportation

- a) weekend transportation support is paid to **school jurisdictions** when **students with a disability** are transported on weekends between their permanent residences and their boarding places by their **parents** and are attending:
  - (i) the **school** of a **school jurisdiction**; or
  - (ii) an **accredited-funded private school**.
- b) 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.

**ECS SPECIAL TRANSPORTATION**

- 7. Total Days Transported: 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.
- 8. Family-Oriented Programming Transportation (Program Unit Funded children only):

Revised

- a) **family-oriented programming** transportation means transportation 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) a minimum of 4 sessions and a maximum of 36 sessions for a Program Unit Funded child may be claimed for **family-oriented programming** Transportation funding:
- 9. Transportation costs incurred for field trips or in-program activities cannot be claimed under this funding. These costs may be claimed for **children with a severe disability/delay** under Program Unit Funding.

**DOCUMENTATION AND REPORTING REQUIREMENTS**

- 1. **School jurisdictions** are required to submit electronically their claims to the Financial Reporting and Accountability 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, A.R. 250/1998; amended A.R. 197/2000*.

Please note that: Rural Special Transportation information (including Weekend and Boarding, if applicable) will be reported on the RURAL CLAIM. Urban Special Transportation information (including Weekend and Boarding, if applicable) will be reported on the URBAN CLAIM. ECS Special Transportation will have a separate claim form called ECS SPECIAL, which is also due to the Financial Reporting and Accountability Branch by November 30.

2. Transportation support payments for each new school year will be paid at 100% 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% 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 **count date** are eligible for funding. Special consideration on the **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. Items a), b), and c) should be kept in an electronic file and be made available to Alberta Education either electronically or on computer disc.
  - a) electronic 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) maps of individual bus routes;
  - d) records of **route distance** verified by an official(s) of the **school jurisdiction**;
  - e) copies of **education service agreements**;
  - f) copies of transportation agreements with **school boards, private schools, charter schools** and **private ECS operators**;
  - g) copies of current vehicle inspection certificates issued under the *Highway Traffic Act*, and
  - h) 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 a disability** requiring special transportation.

## **ADDITIONAL INFORMATION**

1. **School jurisdictions** may also qualify for Relative Cost of Purchasing Goods and Services Adjustment (RCPA) funding for transportation services. Please see details in Section 1.17.

## ALLOCATION DESCRIPTION

**New**

This funding is provided to metro **school jurisdictions** to address the costs associated with providing efficient transportation for **expected eligible passengers** and **students with a severe disability**. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

## ALLOCATION FORMULA

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

$$\begin{array}{rcl}
 \frac{\text{(Residential Area x 75.80)}}{\text{LESS:}} & + & \frac{\text{[Funded Students and Children (ECS-Gr. 12) x 0.7300]}}{\text{}} = \text{ } \\
 \\
 \frac{0.75 \text{ (\# of ECS-Elem. Schools)}}{\text{}} & \times & \frac{\text{Lesser of: Average ECS-Elem. school size in the jurisdiction and average school size for the 4 jurisdictions}}{\text{}} = \text{ } \\
 \\
 \frac{0.400 \text{ (\# of Jr. High Schools)}}{\text{}} & \times & \frac{\text{Lesser of: Average Jr. High school size in the jurisdiction and average school size for the 4 jurisdictions}}{\text{}} = \text{ } \\
 \\
 \frac{0.250 \text{ (\# of Sr. High Schools)}}{\text{}} & \times & \frac{\text{Lesser of: Average Sr. High school size in the jurisdiction and average school size for the 4 jurisdictions}}{\text{}} = \text{ } \\
 \\
 & & \text{Expected Eligible Passengers} = \text{ }
 \end{array}$$

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

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

- 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 for elementary **schools** will be reduced from 0.80 to 0.75 for ECS –elementary **schools**, and
  - the eligible enrollment co-efficient will be reduced from 0.735 to 0.730.

## ALLOCATION CRITERIA

1. Edmonton School District No.7, Edmonton Catholic Separate School District No. 7, Calgary School District No. 19 and Calgary RCSSD No. 1 school districts are eligible for Metro Urban Transportation funding.
2. Funding is determined using a **school** size “benchmark”. The benchmark is the lesser of two values: the jurisdiction’s average **school** size and the average **school** size in the four jurisdictions. A benchmark is determined for each of the three levels (elementary, junior high and senior high).
3. The number of **expected eligible passengers** is calculated using the following factors:
  - a) the benchmark for each level;
  - b) the number of **schools** by level;
  - c) the number of **funded students** and ECS **funded children**;
  - d) the residential area;
  - e) the number of **funded students with severe disabilities** based on the jurisdiction profile.
4. 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:
  - a) **institutions**, outreach **schools**, schools that solely serve home education **students**, and other special **schools** (**schools** where the majority of the **funded students** are special needs students) as determined by School Finance are excluded;
  - b) an ECS-elementary school with fewer than 75 students is not counted;
  - c) an ECS-elementary school with 75 or more students and 3 or fewer grades will be counted as half an ECS-elementary school;
  - d) a junior high school with fewer than 75 students is not counted;
  - e) a senior high school with fewer than 75 students is not counted; and
  - f) a senior high school with fewer than 200 but with 75 or more students is counted as a junior high school.
5. 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. The **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 enrollments will be included in the formula.
7. **ECS children with disabilities** who require special transportation will be funded outside of the Metro Urban Transportation formula at the ECS Special Transportation rate. Transportation funding for **children with disabilities** should be claimed under Section 1.21 of the Manual. **ECS children with a severe disability** who qualify for Program Unit Funding (PUF) cannot be included in the count of **students with severe disabilities** in the Metro Urban Transportation formula.
8. **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*.
9. When a metro urban district is accessing the Metro Urban Transportation funding and has under its jurisdiction an area included in another municipality, the metro urban district 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 district currently claiming under this section and seeking to claim either Rural Transportation (Section 1.19) funding, or Urban Transportation (Section 1.20) funding, must have approval from the **Minister**. Requests for approval should be submitted to the Financial Reporting and Accountability Branch.
10. A metro urban district, 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**.

## DOCUMENTATION AND REPORTING REQUIREMENTS

1. Metro urban districts are required to keep the following information on file and available for review by Alberta Education:
  - a) current **school jurisdiction** transportation policy,
  - b) the number of **eligible passengers** and **eligible transported ECS children**, their names, **school(s)** attended and their programs,
  - c) the names of **students** who are not attending their local **school**, and the reasons, and
  - d) relevant detailed transportation costs for a particular school year.

**ADDITIONAL INFORMATION**

1. 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 cost of the provision of ECS transportation services less the ECS transportation funding the **school jurisdiction** receives from Alberta Education.
2. The metro urban formula will continue for the 2006-2007 school year.
3. **School jurisdictions** may also qualify for Relative Cost of Purchasing Goods and Services Adjustment (RCPA) funding for transportation services. Please see details in Section 1.17.

## ALLOCATION DESCRIPTION

New

This funding, which is in addition to Base Instruction funding, is provided to address the costs of providing programs for eligible **funded children/students** who have insufficient fluency in French. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

## ALLOCATION FORMULA

$$\text{Francisation Allocation} = \left\{ \begin{array}{l} \text{Eligible Francisation} \\ \text{FTE funded} \\ \text{children: Canadian-} \\ \text{born and Foreign-} \\ \text{born} \end{array} \right\} + \left\{ \begin{array}{l} \text{Eligible} \\ \text{Francisation} \\ \text{funded students:} \\ \text{Canadian-born and} \\ \text{Foreign-born} \end{array} \right\} \times \text{Francisation Rate}$$

## ALLOCATION CRITERIA

1. Francisation funding is provided to Francophone regional authorities for Canadian-born ECS **funded children** and **funded students** (code 306) and Foreign-born ECS **funded children** and **funded students** (code 307). Non-Francophone authorities offering **Francisation** services through an agreement with a **Francophone regional authority**, must use codes 306 and 307 with the grants code 145 when registering a Francophone student.
2. A **Francophone regional authority** with students who have insufficient fluency in French to achieve grade level expectations in Français and other subject areas may receive **Francisation** funding for eligible **funded children** counted at 0.5 full-time equivalent and eligible **funded students** in Grades 1 to 12.
3. Students eligible for **Francisation** funding:
  - a) have homes in which the primary spoken language is not French; and
  - b) have minimal French or are non-French speaking.
4. There are two enrollment counts taken for funding Canadian-born **Francisation** students (code 306) and Foreign-born **Francisation** students (code 307) – one on the **count date** and the other on March 1. The March 1 count provides funding for in-year growth for Canadian-born **Francisation** enrollments and Foreign-born **Francisation** enrollments. Each count will be used for funding 50% of the school year, except, if the March 1 count of **Francisation** students is lower than the count on the **count date** then the count on the **count date** will be used for the entire school year.



5. Coding of an eligible **Francisation funded child/student** must be supported by an annual assessment of the student's language proficiency in French. This assessment documentation must be kept on file at the **school** and made available upon request.
6. After three years of instruction it is expected most students would have sufficient fluency in French to access regular programming, although some students may require additional time. Funding will be provided for a maximum of 5 years for each eligible **funded child/student**.
7. **Funded students** enrolled in Home education, **blended programs**, **outreach programs** or **on-line programs** are not counted for funding under this section.

#### DOCUMENTATION AND REPORTING REQUIREMENTS

1. Student registration information for ECS to Grade 12 as of the **count date** of the current school year must be submitted to the Information Services Branch by October 5. 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.
2. March 1: Student registration for ECS to Grade 12, **Francisation** Canadian-born and Foreign-born, as of March 1 must be submitted to the Information Services Branch by March 6.
3. **Francophone regional authorities** cannot claim both **Francisation** funding and ESL funding for the same child.
4. See Section 1.25 for funding of Enhanced ESL and Support Services for Immigrant Students.

### **ALLOCATION DESCRIPTION**

**New**

This funding, which is in addition to Base Instruction funding, ensures that no **school jurisdiction** loses funding under the Implementation of the *Renewed Funding Framework*. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

### **ALLOCATION FORMULA**

**Revised**

Base Year Stabilization Calculation	=	Total Eligible Funding under the <i>Renewed Funding Framework</i> (2003-2004)	-	Total Eligible funding under the Previous Funding Framework (2003-2004)
Stabilization Allocation	=	Previous Year Stabilization Allocation	+	Annual grant rate increase adjusted for Funded Enrollment Decline

### **ALLOCATION CRITERIA**

**Revised**

1. The 2003-2004 school year is the base year for which Stabilization funding was calculated.
2. The Stabilization allocation is increased each year by the annual grant rate increase and adjusted for any funded enrollment decline.
3. Stabilization funding is determined as follows:
  - a) Stabilization funding is estimated in September each year, using previous year enrollments, **school jurisdiction's** estimates of current year enrollments and the current year funding rate increase.
  - b) In June each year, the Stabilization funding for the current year will be finalized when the current year funded enrollments are finalized.

4. The following example shows how Stabilization funding is determined:

**Revised**

Enrollment Data:	
Year	Funded Enrollment
03/04	5100
04/05	5100
05/06	5050
06/07	5000

2003-2004 Base Year Calculation	
	Total Eligible Funding
Previous Framework:	\$35,912,000
Less	
Renewed Funding Framework	\$34,612,000
03-04 Stabilization Funding	<u>\$1,300,000</u>

ADJUSTMENTS: Funding rate increase for each year and enrollment decline for each year:					
<u>2004-2005:</u>					
\$1,300,000	x	1.02	x	$\frac{5100}{5100}$	= <u>\$1,326,000</u>
<u>2005-2006:</u>					
\$1,326,000	x	1.02	x	$\frac{5050}{5100}$	= <u>\$1,339,260</u>
<u>2006-2007:</u>					
\$1,339,260	x	1.02	x	$\frac{5000}{5050}$	= <u>\$1,352,520</u>

## ALLOCATION DESCRIPTION

**New**

This funding, which is in addition to English as a Second Language funding and Base Instruction funding, is provided to address the costs associated with providing supports and services for eligible foreign-born ESL or **Francisation funded children/students**. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

## ALLOCATION FORMULA

$$\text{Enhanced ESL and Support Services for Immigrant Students Allocation} = \left\{ \begin{array}{l} \text{Eligible ESL FTE} \\ \text{funded children and} \\ \text{funded students:} \\ \text{Foreign-born} \end{array} \right\} + \left\{ \begin{array}{l} \text{*Eligible} \\ \text{Francisation FTE} \\ \text{funded children and} \\ \text{funded students:} \\ \text{Foreign-born} \end{array} \right\} \times \text{Enhanced ESL and Support Services Rate}$$

\* Applies to **Francophone regional authorities** only.

## ALLOCATION CRITERIA

1. This funding recognizes students who are functionally illiterate in their language of origin, have little or no exposure to English or French, have little or no formal schooling, have significant challenges to successful enculturation and have been exposed to traumatic events in their country of origin arising from political or civil unrest. This allocation recognizes the costs associated with hiring ESL liaison workers and providing coordinated services for these students.
2. Funding for this program will be based on the following counts as determined under Sections 1.8 and 1.23:
  - a) Code 301: ESL Foreign-born **funded children** (counted at 0.5 FTE) and Foreign-born **funded students**; and
  - b) Code 307: **Francisation** Foreign-born **funded children** (counted at 0.5 FTE) and Foreign-born **funded students**.
3. There are two enrollment counts taken for funding Foreign-born ESL students (code 301) and Foreign-born **Francisation** students (code 307) – one on the **count date** and the other on March 1. The March 1 count provides funding for in-year growth. Each count will be used for funding 50% of the school year unless the ESL or **Francisation** Foreign-born March 1 count is lower than the count on the **count date**, then the count on the **count date** will be used for the entire school year.
4. **Francophone regional authorities** cannot claim both Enhanced **Francisation** funding and Enhanced ESL funding for the same child/student.

## ALLOCATION DESCRIPTION

New

This funding, which is in addition to Base Instruction funding, is provided to address the costs associated with providing appropriate resources for daily physical activity in eligible Grades 1-9 **schools**. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

## ALLOCATION FORMULA

$$\text{DPA Allocation} = \text{Number of Eligible Grade 1 – 9 } \mathbf{schools} \times \text{Funding Rate}$$

## ALLOCATION CRITERIA

1. Daily Physical Activity (DPA) funding is provided to **school jurisdictions** based on the number of eligible **schools** that offer at least one grade in Grades 1-9.
2. **Outreach** schools, **on-line** schools, schools serving solely home education students, and Hutterite colony schools are not eligible for this funding.

Revised

## DOCUMENTATION AND REPORTING REQUIREMENTS

1. School information for funded students enrolled as of the **count date** must be submitted to the Information Services Branch by October 5.
2. **School jurisdictions** are not required to apply for funding under this section. The School Finance Branch will determine the funding allocation for each **school jurisdiction**.

## ALLOCATION DESCRIPTION

New

This funding, which is in addition to Base Instruction funding, is provided to eligible schools to address the higher costs associated with providing programs in Hutterite colony schools. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

## ALLOCATION FORMULA

$$\begin{array}{l} \text{Hutterite Colony} \\ \text{Schools} \\ \text{Funding} \end{array} = \begin{array}{l} \text{Number of colony } \mathbf{schools} \text{ with} \\ \mathbf{funded children/students} \end{array} \times \begin{array}{l} \text{Rate per} \\ \mathbf{school} \end{array}$$

## ALLOCATION CRITERIA

1. The number of colony **schools** to be funded will be determined based on the colony **schools** with funded enrollments as of the **count date**.
2. **School jurisdictions** will not charge a fee or a surcharge to the Hutterite Colony for the basic education of students in Hutterite colony **schools** (see exception described in #3).
3. When a **school jurisdiction** believes that the cost of providing services for students in colony **schools** exceeds the funding they are receiving for those students, then they may make application to the Assistant Deputy Minister, Strategic Services Division, Alberta Education to levy a fee on individual Hutterite colonies. Before making application, **school jurisdictions** must have:
  - 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
  - consulted with the Hutterite colony(ies) affected when developing the application.

## DOCUMENTATION AND REPORTING REQUIREMENTS

1. **School jurisdictions** must submit colony **schools** student registration information as of the **count date** to the Information Services branch by October 5.

## ALLOCATION DESCRIPTION

**New**

This funding, which is in addition to Base Instruction funding, is provided to address the costs associated with providing francophone students access to programming that is equivalent to that being offered by English-language **schools** in the community -in accordance of the *Canadian Charter of Rights and Freedoms* (Section 23). This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

## ALLOCATION FORMULA

$$\begin{array}{l} \text{Francophone} \\ \text{Equivalency Access (FEA)} \\ \text{Funding} \end{array} = \begin{array}{l} \text{Eligible funded} \\ \text{students} \\ \text{Grades 1-12} \end{array} \times \begin{array}{l} \text{FEA} \\ \text{Rate} \end{array}$$

## ALLOCATION CRITERIA

1. Francophone school authorities will receive funding based on their number of **funded students** in Grades 1-12.

## DOCUMENTATION AND REPORTING REQUIREMENTS

1. Francophone school authorities must submit student registration information as of the **count date** to the Information Services Branch by October 5.
2. Francophone school authorities are not required to apply for funding under this section. The School Finance Branch will determine the funding allocation.

## **ALLOCATION DESCRIPTION**

**New**

The funding under most sections of Part 1 of this Manual, is provided to **charter schools** to address the costs associated with providing non-traditional educational programs. This is an allocation method only; **charter schools** have maximum flexibility to use these funds in whatever manner best meets their local needs.

## **ALLOCATION FORMULA**

**Revised**

The funding under Part 1, Part 2, 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 section 1.7 Severe Disabilities, section 1.4 Home Education and section 6.5 Debt Retirement.

## **ALLOCATION CRITERIA**

1. Funds are provided to **charter boards** for each **funded student** enrolled in an established **charter school** whose charter has been approved by the **Minister**. The **charter school** must comply with the terms of its charter and all applicable provincial legislation, and policies.
2. A **charter school** can make an 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**.
3. If a **charter school** is unable to reach an agreement with a **school jurisdiction** for the transportation of its urban students, the **charter school** may claim Student Transportation funding for these students transported at the urban student transportation rate under the Urban Transportation formula.
4. **Charter schools** 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 district** or **division**, the average regular rural transportation allocation per **eligible passenger** transported for which the **board** of that **rural district** or **division** is eligible.
5. The student count used by a **charter school** as of the **count date** must not include students counted by another **school authority** on the **count date**.



**DOCUMENTATION AND REPORTING REQUIREMENTS**

1. To claim funding and receive payment from Alberta Education, **charter schools** must meet the same requirements as **school jurisdictions** as outlined under Part 1; Part 5; Part 6; and Part 8 of this Manual.
  2. **Charter schools** must be incorporated under the *Societies Act*, or be a company registered under Part 9 of the *Companies Act*.
  3. A **charter board** must appoint an auditor and submit a budget report form and audited financial statements in accordance with Sections 145 to 152 of the *School Act*, reflecting the financial operation of the **charter school**.
  4. A **charter school** must keep in force insurance and bonds that are required by provincial legislation.
  5. A **charter school** must carry a blanket fidelity bond for the **charter school** and all employees in an amount acceptable to the **Minister**. Agents refer to this as a “commercial blanket bond”.
  6. **Charter boards** who are intending to cease the operation of a **charter school** or transfer its operation to another **board** must receive approval from the **Minister** and conclude operations in accordance with the terms of the charter and *Charter School Regulation*.
  7. Funding may be advanced on a one-time basis to any newly approved **charter school**. 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.
- New

**ADDITIONAL INFORMATION**

1. Funding for **students with severe disabilities** attending **charter schools** is provided based on the eligibility of individual students. **Charter schools** that have **students with a severe disability** must comply with the Conditions and Requirements outlined in Section 3.3.
- New

**REFERENCES**

*Charter Schools Handbook*

*Charter Schools Policy 1.1.1*

*Charter Schools Regulation AR 212/2002*

**NEW and Under Review for 2007-2008**

**ALLOCATION DESCRIPTION**

**New**

This funding, for **school jurisdictions** and **charter schools**, which is in addition to Base Instruction funding and other Capital funding, is provided to address the costs associated with the maintenance and operation of **schools** to ensure they are safe, comfortable and a suitable environment for students to learn. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

**ALLOCATION FORMULA**

$$\begin{array}{c} \text{Plant} \\ \text{Operation} \\ \text{and} \\ \text{Maintenance} \\ \text{Allocation} \end{array} = \left\{ \begin{array}{c} \text{Base} \\ \text{Line} \\ \text{Funding} \end{array} \times \left( 1 + \begin{array}{c} \text{Sparsity -} \\ \text{Distance} \\ \text{Factor} \end{array} \right) \right\} + \begin{array}{c} \text{Travel} \\ \text{Time} \\ \text{Allowance} \end{array} + \begin{array}{c} \text{Small} \\ \text{Schools by} \\ \text{Necessity} \\ \text{Supplement} \end{array}$$

Baseline Funding Component:

The Baseline Funding component is based on a jurisdiction's funded enrollments and is determined as follows:

(K-6 funded enrollment X \$703 per student) + (Gr. 7-9 funded enrollment X \$664 per student) + (Gr. 10-12 funded enrollment X \$667 per student)

The term "funded enrollment" used in this section is based on the jurisdiction's 2005-2006 **Frozen Funded Student Count** as of May 31, 2006. **Funded ECS children** are counted as 0.50 FTE of a **funded student**. **Students with a Severe Disability** are counted as 3 FTE's, where the number of these students is based on the 2005-2006 severe disabilities profile for the **school jurisdiction**. **Children with a severe disability/delay** are counted as 1.5 FTE's. **On-line** students are counted as 0.10 FTE.

### Sparsity-Distance Component

This component makes adjustments for sparsity and distance factors in each jurisdiction.

The Sparsity Factor is determined by dividing the jurisdiction's area by the 2005-2006 **Frozen Funded Student Count**. The Distance Factor is the average distance in kilometers from the jurisdiction central office to Edmonton or Calgary, whichever is closer. The table below determines the combined Sparsity-Distance Factor (%) for jurisdictions.

**Sparsity-Distance Factor Table**

Distance Factor	Sparsity Factor					
	0 to 0.249	0.25 to 0.99	1 to 1.49	1.5 to 1.99	2 to 2.49	2.5 to 3.0
0-100 km	0%	1%	2%	3%	4%	5%
100-200	1%	2%	3%	4%	5%	6%
200-400	2%	3%	4%	5%	6%	7%
400-600	4%	5%	6%	7%	8%	9%
Over 600	8%	9%	10%	11%	12%	13%

### Travel Time Allowance Component

This component allows for maintenance staff travel time and is determined as follows:  
 (sum of the distance from each school to the central shop less 25 kilometers) X (3 trips to school per week X 52 weeks) X \$0.45 per kilometer.

### Small Schools By Necessity (SSBN) Component

This component is a supplemental adjustment for SSBN and is the sum of the following calculations:

(Total SSBN Differential X K-6 % of total funded enrollments X \$703 per student) +  
 (Total SSBN Differential X Gr. 7-9 % of total funded enrollments X \$664 per student) +  
 (Total SSBN Differential X Gr. 10-12 % of total funded enrollments X \$667 per student)

The Total SSBN Differential is the sum of the SSBN Differentials calculated for each SSBN. Each SSBN Differential is determined as follows:

(SSBN capacity X 85%) minus (the total enrollment for the SSBN).

The "total enrollment for the SSBN" is the sum of the funded and non-funded students (2005-2006) - where ECS children are counted as 0.50 FTE, **students with a severe disability** are counted as 3 FTE's, **children with a severe disability/delay** are counted as 1.5 FTE's, and **on-line** students are counted as 0.10 FTE.

The "% of total funded enrollments" is calculated by dividing the 2005-2006 funded enrollment for the grade range by the total 2005-2006 funded enrollment (across all grades) for the school jurisdiction. The jurisdiction's 2005-2006 "funded enrollments" 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 2005-2006 school year (section 1.11).

### ALLOCATION CRITERIA

1. Enrollment numbers used in the formula for Plant Operations and Maintenance Funding are based on the 2005/2006 school year **Frozen Funded Student Count** as of May 31, 2006. **Funded ECS children** are counted as 0.50 FTE of a **funded student**. **Students with a Severe Disability** are counted as 3 FTE's, where the number of these students is based on the 2005-2006 severe disabilities profile for the **school jurisdiction**. **Children with a severe disability/delay** are counted as 1.5 FTE's. On-line students are counted as 0.10 FTE.
2. The Small Schools by Necessity component is based on those schools that qualified for SSBN funding in the 2005-2006 school year (section 1.11).
3. Charter Schools are not eligible for the SSBN component of this funding.

### DOCUMENTATION AND REPORTING REQUIREMENTS

1. **School jurisdictions** are not required to apply for funding under this section. The School Finance Branch will determine the funding allocation for each **school jurisdiction**.

<b>NEW</b>
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### **ALLOCATION DESCRIPTION**

This funding, which is in addition to other transportation funding, is provided to address higher school bus fuel costs. This is an allocation method only; **school jurisdictions** have maximum flexibility to use these funds in whatever manner best meets their local needs.

### **ALLOCATION FORMULA**

The formula varies depending on the type of school jurisdiction (ie. rural, urban, or metro).

### **ALLOCATION CRITERIA**

1. Fuel Price Contingency funding is allocated to rural, urban, and metro school jurisdictions as well as charter schools.
2. For rural and urban school jurisdictions and charter schools, the formula is calculated based on the variables of bus route distances, fuel consumption rates, and the average monthly price of fuel that exceeds the provincially budgeted rate of 60 cents per liter.
3. For metro urban school jurisdictions, the formula is based on estimated kilometers traveled. Urban boards that utilize public transit receive a funding adjustment based on local transit pass cost increases.

### **DOCUMENTATION AND REPORTING REQUIREMENTS**

1. School jurisdictions are not required to apply for funding under this section. The Financial Reporting and Accountability branch will determine the funding allocation.

### **ADDITIONAL INFORMATION**

1. For information on your school jurisdiction's funding allocation, please contact the Financial Reporting and Accountability branch for details.

## **PURPOSE**

This funding enables **private ECS operators** to provide **funded children** with a basic **Early Childhood Services (ECS) program** to help prepare them for entry into Grade 1 and provide a foundation for later success.

## **CONDITIONS**

1. Base Instruction funding is provided for each **funded child** enrolled in an **ECS program** with a **private ECS operator** that provides access to at least 475 hours of ECS instruction.
  - a) Some modification to this requirement is allowed for **children with special needs** (mild, moderate, or severe and gifted and talented) who because of their special needs or young age cannot be accommodated by a 475-hour program (i.e., they may require more or fewer hours).
  - b) Also some **children with severe special needs**, either because of their disability or young age, may benefit from a combined program involving **center-based** hours and **family-oriented programming** sessions. A combined program must have a minimum of four **family-oriented programming** sessions to qualify for funding. See definition of **family-oriented programming** in the Glossary of Terms for more details.
2. An approved **private 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 **child** referred to in Section 30(1)(a) of the *School Act* is not a resident or non-resident student of a **board**, therefore, approved **ECS operators** shall not use the residency or non-residency of the **parent** of a child in a **school jurisdiction** to:
  - a) deny a **funded child** access to the program; or
  - b) differentiate as to the fees charged for the program.
4. For the purpose of claiming ECS Base Instruction Funding, the ECS count must not include any **funded child** counted by another **ECS operator** for funding purposes in the school year. A **funded child** can only be claimed for funding by one **ECS operator** per year. The **ECS operator** claiming the **funded child** is responsible for ensuring the **funded child** was not claimed for funding by another **ECS operator** in the current school year.

However, if a **funded child** is attending more than one **ECS program** on the **count date** and a resolution cannot be reached as to which **ECS operator** should count the **funded child**, then the ECS Base Instruction funding will be split accordingly. For example, a **funded child** may be enrolled in a morning program with one **ECS operator** and also enrolled in an afternoon program with another **ECS operator**.

5. **ECS operators** are eligible for one year of Base Instruction funding for regular ECS **funded children**. **Funded children** must be at least 4 years 6 months of age and less than 6 years of age on September 1. The minimum age may vary depending on the **school** entrance age policy of the **school authority** the child will enter. Alberta Education will not provide more than one year of funding for a regular ECS **funded child**.
- Revised** 6. An ECS **child with a disability/delay** may qualify for more than one year of funding. See definition of **funded child** in the Glossary for more information. Note that an ECS **funded child** may not receive more than 3 years of ECS funding in total.
- Revised** 7. Alberta Education provides funding for a basic 475 hour **ECS program** which includes support for instructional salaries and benefits, learning resources, furnishings and equipment. **Private ECS operators** must ensure that **funded children** have access to a 475-hour program without any fee charged for instructional programming and services.
8. A **private ECS operator** may charge a fee to for **funded children** in a basic 475-hour program for non-instructional costs such as supplies, snacks, and field trips.
9. **Private ECS operators** that offer an **ECS program** with more than 475 hours may charge a reasonable fee to cover the cost of additional instructional hours.
10. Individuals age 5 years 6 months or older, but less than 6 years of age on September 1 are counted as **funded students** (rather than as **funded children**) if they are eligible to enter Grade 1 under the **school** entrance age policy of the **school jurisdiction**. The exceptions to this are:
- a) if the **funded child** has spent less than the number of years in the program for which he/she is eligible for funding, i.e., received less than three years program unit funding; or
  - b) if the **funded child** has not enrolled in an **ECS program** prior to this age; or
  - c) if the **funded child** has been identified as **developmentally immature** (code 10). This child is not eligible for special needs funding and should not have been identified as special needs in prior years.
- In these circumstances, when in the opinion of the **school authority** and the **parent**, an **ECS program** is considered the most appropriate program; the individual is counted as a **funded child** under ECS.
11. Individuals aged 6 years or older, but less than 7 years on September 1 are counted as **funded students** except individuals who are in an **ECS program** and are:
- a) **developmentally immature** (code 10); or
  - b) entering an **ECS program** for the first time.
- These individuals (a or b) are counted as **funded children**.

12. An individual who is eligible to proceed to Grade 1, but who has been identified as **developmentally immature** and whose program plan involves both ECS and Grade 1 instruction may be counted either as a **funded child** or as a **funded student**.
13. Individuals aged 6 to 7 years old, who require another year of ECS and who have been assessed as having special needs (mild, moderate, severe or gifted and talented) must be counted as **funded students**.
14. Under no circumstances can an individual be counted as both a **funded student** and as a **funded child** in the same school year.

## REQUIREMENTS

### 1. New Private ECS Operators

Upon request, the form "Notice of Intent to Operate" will be sent to new **private ECS operators** by their respective Zone Services branch. New **private ECS operators** will be required to provide a Certificate of Incorporation under the *Societies Act*, or be registered as a non-profit company under Part 9 of the *Companies Act*, or be incorporated as a non-profit corporation under an Act of the Legislature. Also required is documented proof that the ECS facility meets all applicable municipal and provincial health, building and safety standards, that the operator has appropriate insurances in place, and that there is a signed declaration (within the completed Notice of Intent) that the program will operate in accordance with the *School Act*, Section 30.

### 2. Existing Private ECS Operators

The form "Notice of Intent to Operate" will be sent to **private ECS operators** by their respective Zone Services Branch in June. **Private ECS operators** may be required to provide documentation such as the current status of their Certificate of Incorporation and proof that their facility meets fire and health safety standards. If a **private ECS operator** has been approved as a **Designated Special Education ECS Program**, this must be indicated on the Notice of Intent to Operate.

3. **Private ECS operators** must complete and submit the "Notice of Intent to Operate" form to their respective Zone Services Branch by July 30. The information on this form initiates the first payment of the school year.

All information provided in the Notice of Intent to Operate must be accurate and if any information changes the appropriate Zone Services Director must be notified.

4. **Accredited-funded Private schools** that operate **ECS programs** must complete and submit by May 31 a **Private School "Annual Operational Plan"**. The Notice of Intent for ECS operations within a **private school** is incorporated into the Annual Operation Plan.



All information provided in the Annual Operational Plan must be accurate and if any information changes, the appropriate Zone Services Branch must be notified.

5. All **private ECS operators** must advise their respective Zone Services Branch within one week of any changes which occur in facility, society, programs, or teaching staff during the school year. **Accredited-funded private schools** must send a list of any teaching staff changes to their respective Zone Services Branch by September 19.
6. A **private ECS operator** must maintain a blanket fidelity bond with respect to the **private ECS operator** for employees and **board** members in the amount of \$50,000 or the accumulated surplus plus 40% of Alberta Education funding for the program year (the value of the first payment in the first month of operation), whichever is less.
7. For **ECS programs** beginning in September, ECS Base Instruction funding is based on the **funded child** registration information as of the **count date** and submitted to the Information Services Branch by October 5.
8. Funding for ECS Base Instruction is calculated by multiplying the number of eligible **ECS funded children** by the rate for ECS Base Instruction.
9. For **ECS programs** beginning after the **count date**, the count will be taken as of the last **operating day** of the month in which the **ECS program** begins. The registration information must be submitted within three weeks of that day to the Information Services Branch.

**Updated**

**ECS programs** beginning after the **count date** must also submit a letter to the Director of the School Finance Branch indicating that they are a late starting program, what the start date of the program is, 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.

10. If any adjustment is required to the enrollment data reported to the Information Services Branch, the **private ECS operator** must either complete the "Add, Modify, Delete" form (Form 06AE1.2c) and submit to the School Finance Branch or submit the data using the Funding Event System (FES) by the April 30 deadline.

**CONSIDERATIONS**

1. **Private ECS operators** who are intending to cease operation of an **ECS program** should refer to the policy in the Appendices section of this Manual.
2. Refer to Section 8.7 for additional information on Enrollment Counts and Conflicts.

## FEES AND DEDUCTIONS

### 1. Portable Classroom Rental Fee:

Alberta Education will deduct from a **private ECS operator's** funding payment a rental fee of \$100 a month (plus GST) for each portable classroom under an existing lease agreement with Alberta Infrastructure and Transportation. New requests for portable classrooms will not be considered.

Monthly fee deductions will be made for programs that operate for partial months if the program begins before the 15<sup>th</sup> day of the month or ends on or after the 15<sup>th</sup> day of the month.

Subject to Ministerial approval, a **board** that assumes responsibility for a private **ECS program** operating in an ECS portable under a lease agreement with Alberta Infrastructure will be given the opportunity to purchase the portable if it is in good repair. Alberta Infrastructure and Transportation is responsible for the disposition of a portable if it is no longer required or if the cost of maintenance and repair can no longer be justified.

### 2. Access Copyright :

Alberta Education has an agreement with the Canadian Copyright Licensing Agency (Access Copyright). Most **schools** in the province are covered in the license. Alberta Education makes the payment for the license on behalf of all participating **private ECS operators**. The cost of the license, plus GST, is recovered from **private ECS operators** on a full-time equivalent student basis. It is up to the individual **private ECS operators** to apply for any GST rebate from the Government of Canada.

### 3. EduLink:

EduLink, a multi-functioned data exchange software tool, has been created to help **private ECS operators** and Alberta Education simplify current data management and exchange processes.

Alberta Education will deduct approximately 35¢ plus GST per child on behalf of all **private ECS operators** using EduLink. This deduction will be made in September and based on the prior year frozen **funded child** count for ECS. The deduction will be reflected on the September funding statement. It is up to the individual **private ECS operators** to apply for any GST rebate from the Government of Canada.

**Revised** Alberta Education will forward the maintenance fee of \$200,000 to the host board - Edmonton Catholic Schools. This funding will provide for the software's annual maintenance, but does not address the cost of any significant changes to the software.

**REFERENCES**

*ECS Advisory Manual on Early Childhood Services, August 2004*

*Kindergarten Program Statement Revised September 2005*

*Early Childhood Services Policy 1.1.3*

*Early Childhood Services Regulation AR 31/2002*

## **PURPOSE**

This funding enables **private Early Childhood Services (ECS) operators** to provide **ECS programs** designed to meet the educational needs of **children with mild or moderate disabilities/delays** and **funded children** who are gifted and talented.

## **CONDITIONS**

1. Funding is provided to a **private ECS operator** to meet the educational needs of **children with a mild or moderate disability/delay** and **funded children** who are gifted and talented for a maximum of two years. **Funded children** must be, on September 1, at least 3 years 6 months old and less than 6 years old.
2. A **child with a mild or moderate disability/delay** or a **funded child** who is gifted and talented who is at least 5 years 6 months of age and less than 6 years of age, and who is eligible for Grade 1 (under the **school** entrance age policy) may be eligible for mild/moderate ECS funding if the **parent**, and the **private ECS operator** agree that an **ECS program** is the most appropriate program (if the **funded child** has not previously received 2 years of ECS funding.) See the definition of **funded child** in the Glossary of Terms.

## **REQUIREMENTS**

1. Special needs funding is based upon **funded child** registration information as of the **count date** and submitted to the Information Services Branch by October 5. **Children with a mild or moderate disability/delay** must be coded using code 30 and **funded children** who are gifted and talented must be coded as code 80. The grants code 500 must also be included on the electronic SIS registration file or Alberta Education Student Registration Form to receive this funding.
2. Recent assessment documentation to support each **funded child's** designation and identification as a **child with a mild or moderate disability/delay** or a **funded child** who is gifted and talented must be kept on file by the **private ECS operator**.
3. An **Individualized Program Plan (IPP)** must be developed, implemented, regularly revised and kept on file by the **ECS operator** for each **child with a mild or moderate disability** or a **funded child** who is gifted and talented. Documentation must also be on file, which identifies how the funding was utilized to provide additional educational supports and/or services to the **funded child**. Development and implementation of the **IPP** must be carried out under the direction of a certificated teacher.

4. For **funded children** who have been assessed as having a mild or moderate disability/delay or identified as being gifted and talented after the **count date**, but who were enrolled in the program on the **count date**, an “Add, Modify, Delete” form (Form 06AE1.2c) must be completed and submitted to School Finance by the April 30 deadline to receive this funding.
5. **Private ECS operators** receiving this funding must offer programming that meets the educational needs of **children with a mild or moderate disability/delay** or **funded children** who are gifted and talented.

## **CONSIDERATIONS**

1. Funding for **children with a mild or moderate disability/delay** or **funded children** who are gifted and talented is calculated by multiplying the number of **children with a mild or moderate disability/delay** and **funded children** who are gifted and talented (code 30 or 80 and grants code 500) by the mild/moderate rate.
2. Alberta Education may monitor programs serving **children with a mild or moderate disability/delay** and funded children who are gifted and talented.

## **REFERENCES**

Advisory Manual on Early Childhood Service for Incorporated Non-Profit Societies or Private Schools

Early Childhood Services Policy 1.1.3

Guide to Education: ECS – Grade 12

## **PURPOSE**

This funding provides for individual programs for **children with a severe disabilities/delay** to meet their educational needs.

## **CONDITIONS**

1. Program Unit Funding (PUF) may be paid to a **private ECS operator** for each eligible **child with a severe disability/delay** for a maximum of three years.
2. The funding amount paid will be the lesser of the program unit ceiling, the approved budget total, and the actual cost.
3. To be eligible for funding, a **child with a severe disability** must be at least 2 years 6 months of age and less than 6 years of age on September 1. **Private ECS operators** should plan the funded child's program so that the last year of PUF is the year prior to the funded child's entry into Grade 1.
4. **Private ECS operators** will use the categories and codes outlined in the definition of **students/funded children with a severe disabilities/delay** in the Glossary of Terms to determine a funded child's eligibility and to properly code the child for funding purposes.
5. A funded child receiving PUF is not eligible for ECS mild/moderate funding.
6. A funded child can be claimed by only one **ECS operator** at a time. The **ECS operator** claiming the funded child is responsible for ensuring the funded child is not claimed by another **ECS operator**.
7. Eligibility for PUF will be based on all of the following:
  - a) a diagnosis of a disability/delay or condition at the severe/profound level by qualified personnel (note: a diagnosis alone is not sufficient to qualify for funding);
  - b) written descriptions, results of educational assessments and/or anecdotal notes that indicate the funded child's current level of functioning in the ECS environment;
  - c) a current **Individualized Program Plan (IPP)** which addresses the funded child's educational needs; and
  - d) the levels of support and services being provided to the funded child.

To expedite the application approval process, pre-approval of a child's eligibility may be obtained by submitting assessment information to support the eligibility of the child. This information could include actual reports, summary information, or a format agreed upon with Alberta Education. When an **ECS operator** is uncertain of a child's eligibility, the operator is encouraged to discuss the issues of the child's eligibility with the Special Programs Branch of Alberta Education prior to making an application.

## REQUIREMENTS

- Revised**
1. A PUF application must be submitted (Form 06AE2.3a) to the School Finance Branch by December 22, 2006. Payment is based on approval of this application. Applications may be submitted either on paper or electronically using the Program Unit Funding System (PUFS). A separate PUF application must be completed for each **school** that has funded children eligible for PUF. As part of the application, an individual budget must be submitted for each program unit listed on the application. Revisions to PUF applications will be accepted until April 1. Assessment information must be sent to the Special Programs Branch for approval of a child's eligibility prior to submission of a PUF application.

NOTE: All **private ECS operators** and **designated special education ECS programs** with more than 10 PUF children are required to submit their PUF applications through PUFS. Workshops on how to use PUFS will be held in the Fall. Staff using PUFS should have appropriate training before using the system. Any **private ECS operator** or **private school** with 10 or fewer PUF children may apply using the paper application.

2. The following information pertaining to funded children receiving PUF must be kept on file by **private ECS operators** and made available to the Special Programs Branch on request:
  - a) an **Individualized Program Plan (IPP)** must be developed, implemented and regularly revised for each program unit funded child; and
  - b) formal assessment documentation to support the severity of each program unit funded child's special needs (a current assessment report must be included with the PUF application); and
  - c) informal assessment documentation reflecting current performance levels; and
  - d) plans and summaries of **family-oriented programming** sessions conducted over the year; and
  - e) current budget information.

- Revised**
3. An application for a funded child who is identified or registered after December 22 will be accepted until April 1 using the process described in #1.
  4. When a funded child leaves a program before the end date specified on the PUF application please notify Alberta Education of the changes by submitting the PUF Application Adjustments Form (Form 06AE2.3b) to the School Finance Branch within 30 days of the child's departure. The original budget total and ceiling will then be adjusted.
- Revised**
5. When a **child with a severe disability/delay** moves from one **ECS operator** to another, a new PUF application (based on the **IPP**) must be submitted by the second operator prior to April 1 of the program year.
  6. All **private ECS operators** must report actual expenditures on the schedule pertaining to Program Unit Expenditures in the Audited Financial Statements, which are due November 30.
- Revised**
7. If a PUF child has a medical condition/disability which has not changed significantly since the initial diagnosis and was previously approved by Alberta Education, an updated medical diagnosis is not required; however, documentation outlining current level of functioning is necessary to ensure continuation of PUF. This information must be kept on file and available for review by Alberta Education.
- Private ECS operators** must provide documentation to Alberta Education to support continued PUF for previously program unit funded children with a severe delay involving language or any other condition likely to change significantly as a result of intervention, maturation or changes within the program unit funded child's environment. Documentation must include the following:
- a statement from the appropriate professional that the program unit funded child continues to demonstrate a severe disability/delay;
  - description of the necessary supports and services the program unit funded child requires as a result of the disability/delay;
  - description of the impact of the disability/delay on the program unit funded child's ability to function within the ECS environment.
- It is the responsibility of the **private ECS operator** to ensure that all **funded children** claimed under PUF meet the eligibility criteria outlined. **Private ECS operators** that are uncertain about the eligibility of a funded child are encouraged to contact the Special Programs Branch for confirmation of eligibility.
- Revised**
8. **Clustering** (see definition in Glossary of Terms) should be the first option considered for PUF children. Whenever possible, operators should cluster PUF children with similar needs who share resources (regardless of setting). The decision to cluster funded children into a program unit should be based on the educational needs of the PUF children.



9. A program unit funded child's **centre-based programming** hours and **family-oriented programming** sessions must meet the child's needs. If a combined program of centre-based hours and **family-oriented programming** sessions is provided, there must be a minimum of four family-oriented programming sessions in order to be included in the ceiling calculation (see example of ceiling calculation). See definition of **Family-oriented Programming** in the Glossary of Terms. Also see definition of **centre-based ECS programming** in the Glossary of Terms.

Note: **family-oriented programming** is not intended as the only form of programming a program unit funded child receives, but rather is intended to enhance the centre-based component of the child's education program as outlined in their **IPP**. (See definition of **centre-based ECS programming** in the Glossary).

For funding purposes, **family-oriented programming** is claimed as sessions, where a session is defined as a minimum of 1.5 hours. A session involving more than one child and their **parent(s)** may be pro-rated based on the number of children and **parents** involved in the session and the length of session (minimum 45 minutes). Note: intervention provided by a member(s) of the child's learning team to the child, must involve the **parent/caregiver** in order to be counted as an eligible **family-oriented programming** session.

An eligible **family-oriented programming** session must meet the following conditions:

- a written plan must be developed for each session;
- it must be under the direction of the certificated teacher;
- every opportunity is explored to involve the child's **parents**;
- in exceptional circumstances, when it is not possible to involve the **parent** directly and the session is with an alternate caregiver, provision must be made for sharing information with the **parent**;
- it must involve the **parent** or alternate caregiver, the child (in most cases), and a teacher, or a developmental specialist under the direction of a teacher;
- a minimum of 4 sessions must be provided to be counted in the ceiling calculation on the PUF application;
- the frequency of **family-oriented programming** sessions is included in the child's **IPP**;
- programming must occur outside of time claimed under centre-based hours;
- **family-oriented programming** must be an additional cost to the **school authority**.

See also Additional Information item #6 on **family-oriented programming** sessions – what counts and what doesn't.

10. To access the full ceiling amount, the program offered must be a full-time program. A full-time program must provide either 800 hours of educational programming for a program unit funded child in **centre-based ECS programming** or a minimum of 36 **family-oriented programming** sessions during the school year, or the equivalent combination of hours and sessions. Special Programs Branch may review the setting and level of program to ensure these meet the educational needs of the child.

11. 800 hours is the maximum number of **centre-based ECS programming** hours that will be funded. Summer programs are not eligible for PUF and should not be included as part of the 800 hour maximum.

In some exceptional circumstances, for a funded child's last year of PUF, additional program hours beyond 800 hours (maximum 950 hours) may be approved, based on an individual program unit funded child's needs. A written explanation of the need for the additional program hours must be submitted with the PUF application. Approval by the Special Programs Branch is required. This exception will be subject to the ceiling amount.

12. Program Unit Funding is supplemental to the ECS Base Instruction funding. It is intended to cover the additional program costs required to meet the educational needs of the funded child **with a severe disability/delay**.

For **private ECS operators** who are providing a program for a **child with a severe disability/delay** in the regular ECS classroom, Base Instruction funding, Part 2, Section 1, is paid on behalf of all funded children in an **ECS program**. Base Instruction funding is available for **children with a severe disability/delay** who are as young as 2 years and 6 months on September 1. This funding supports the day-to-day operating costs of the program, such as teacher salaries, rent, utilities, and supplies. Since these costs would be incurred whether or not a **child with a severe disability/delay** was in the program, they should not be included in the program unit expenditures. Teachers' salaries should not be included as program unit costs because the ECS Base Instruction funding supports these costs.

13. When completing the budget page of a PUF application the budget amounts should approximate anticipated costs. The following specifies the costs that may be included for PUF. Any exception to these costs should be discussed with Alberta Education before submitting the application.

a) Instructional costs

- (i) Salaries, wages and employer's portion of benefits and expenditures applicable to teacher assistants directly involved in planning, implementing and evaluating the program for the program unit funded child(ren). The number of hours claimed here may exceed the funded child's program hours by up to 10% for each child within that program unit. **Clustering** and small group program delivery should be considered as alternatives to full-time direct one-to-one assistance. Teacher Salary costs are not eligible costs under this category. (See Additional Information #7 on page 10 of this section).
- (ii) Services Purchased – includes services of qualified personnel in the areas of speech-language pathology, occupational therapy, physical therapy, orientation and mobility training, special education consultation, psychological and other services, and assessment costs that are not provided free by public service agencies. Costs should be reasonable.

Operators must keep records of all services purchased under PUF. All options regarding service delivery should be considered. Operators must ensure that all services purchased are relevant to the child's educational program and are in direct support of the goals and objectives included on the child's **IPP**.

Special Education Consultation is a service purchased by the **private ECS operator** to provide programming support for the ECS teacher. Examples of services provided under Special Education Consultation include assistance with **IPP** development and review, programming strategies, suggested resources and materials, and support of off-site program components. Special education consultation is delivered by a certificated teacher with appropriate training and experience. On-site special education consultation costs are additional costs to the **private ECS operator** that provide direct programming support. These costs will be subject to a maximum of \$1,500 per program unit funded child based on a full-time program. For programs less than 800 hours, the \$1,500 maximum will be pro-rated based on the program hours and number of eligible **family-oriented programming** sessions.

For example, special education consultation costs for 475 hours and 6 **family-oriented programming** sessions (formerly home visits) would be calculated as follows:

$$\$1,500 \times \left( \frac{475}{800} + \frac{6}{36} \right) = \$1,141.$$

ECS Operators must keep records of costs and services associated with Special Educational Consultation.

#### Revised

Playschool or pre-school fees may be claimed as an eligible PUF expense under Services Purchased. Sometimes **ECS operators** may find it necessary to contract placement in a daycare setting for delivery of the child's educational program. The following apply for daycare placements:

- The placement in the daycare is the best available option for the child's educational program.
- The child has not been previously placed in the daycare by the parent for childcare purposes.
- Daycare fees may only be claimed for that portion of day required for the educational component of the child's program.
- Costs for childcare are not eligible to be claimed under PUF.

In general, the educational needs of young children (3-4 years old) are most appropriately met in a program that is 475 hours or less.

- (iii) Supplies and materials – instruction supplies and materials which are particular to the program unit funded child's program, and are in addition to supplies purchased with Base Instruction funding. Costs in this area are usually in the \$200 - \$500 range per program unit funded child.

**Private ECS operators** are encouraged to maintain a resource inventory and an equipment loan pool.

- b) **Parent In-service** – costs for **parents** to attend in-province workshops, seminars, in-services and specialized training sessions specifically related to the funded child's program and designed to enhance the ability of **parent(s)/guardian(s)** to assist in the program unit funded child's development. Costs in this category are usually in the \$100 – \$400 range per program unit funded child.
- c) **Staff In-service** – costs for teachers and teacher assistants to attend workshops, in-services, special courses and seminars related to staff responsibilities in the program unit funded child's program and in parental assistance. Costs in this category are usually in the \$200 - \$500 range per program unit funded child. Personnel included in Services Purchased are not eligible for Staff In-service.
- d) **Transportation** -Funding for transportation of program unit funded children is available under Section 2.5 ECS Special Needs Transportation funding and under Section 2.4 ECS Regular Transportation funding. Funding for these sections may be applied for by submitting an electronic ECS transportation application.

Transportation costs for **children with severe disabilities/delays** not covered by these transportation grants, may be claimed as a PUF expense. To determine the amount of transportation costs that may be covered by PUF, all transportation costs must be listed on the PUF budget, then all transportation revenues must be deducted from the transportation costs. The following descriptions indicate the types of transportation costs which can be claimed and which transportation grants are available.

Note: transportation claims must be submitted to the Financial Reporting and Accountability Branch by November 30 -only program unit funded children who were enrolled by the **count date** are eligible.

- i) Transportation to and from school: If a PUF child can ride a regular school bus, then ECS Regular Transportation funding can be claimed under Section 2.4. If a PUF child is not able to ride a regular school bus (either because of their disability or because of their young age) and requires some form of special transportation, then Special Transportation funding can be claimed under Section 2.5. Transportation costs (for PUF children) that exceed the funding paid under Sections, 2.4 and 2.5, may be claimed as an eligible cost on the PUF budget form.

Revised

- ii) **Family-oriented Programming sessions:** Transportation funding for these costs may be claimed under Section 2.5 for each scheduled session made by a member of the child's learning team to the home of a program unit funded child who has **family-oriented programming sessions** as part of his/her **ECS program**. Funding provided under Section 2.5 is based on the number of **family-oriented programming sessions** up to a maximum of 36 sessions. Transportation costs in excess of the funding paid under Section 2.5 may be claimed as transportation costs under PUF;
- iii) **Other – Field Trips:** Transportation costs for field trips that are provided in addition to field trips for the regular ECS class or for a program unit funded child who, because of his/her disability/delay, requires special transportation on a regularly scheduled field trip may be claimed under PUF; and
- iv) **In-Program:** Transportation costs for this area may be claimed as transportation costs under PUF. In-program transportation is transportation of the program unit funded child from the **school/centre** program off-site to another program or service as part of the funded child's **Individualized Program Plan (IPP)**.

e) Operation and Maintenance

Funding for this area is provided under Section 2.6 – Plant Operations and Maintenance funding. Costs for this category may not be claimed on the PUF budget.

f) Administration

Funding for this area is provided under Section 2.7 – ECS Administration funding. Costs for this category may not be claimed on the PUF budget.

g) Capital: Furniture and Equipment – These are child-specific expenditures for specialized furniture and equipment that are not available from another source, and are required to meet the special needs of a PUF child. ECS operators are advised to keep current on information regarding provision of adaptive or augmentative devices by other agencies. Managers from Special Programs Branch are available to provide assistance and advice in this area.

- (i) For any major equipment and furniture purchase, a written recommendation from an appropriate specialist indicating the necessity of the equipment is required. The letter from the specialist should specify the relevance of the equipment to the child's educational program and how it directly supports the goals and objectives of the child's **IPP**. The letter should also include projected costs of the capital equipment. This letter should be faxed to the Special Programs Branch.

Revised

- (ii) Costs of capital equipment should be reasonable. In some cases an **ECS operator** may be required to provide 2 or more price quotations prior to approval. Approval by the Special Programs Branch is required for all capital expenditures.
- (iii) Expenditures should not exceed 15% of the total budget.
- (iv) A specialized piece of furniture or equipment no longer used by the program unit funded child remains the property of the **private ECS operator**, not of the program unit funded child or **parents** of the program unit funded child. If a program unit funded child changes **schools** in Alberta but continues to have use for the specialized furniture or equipment specifically purchased for that child, the furniture or equipment goes with the program unit funded child.
- (v) Renovations to a building to be used for the benefit of all program unit funded children in the instructional area are not eligible for support under this section.
- (vi) Administrative capital purchases cannot be claimed under this category.

14. **Designated Special Education ECS programs.**

These are **ECS programs** where at least 70% of the program unit funded children enrolled have a severe disability/delay. The following requirements apply.

**New**

- a) A program must be approved as a **private ECS operator** by Alberta education prior to applying for status as a **Designated Special Education ECS program**.
- b) Applications for new programs must be submitted as a proposal to the Director of the Special Programs Branch by June 1, 2006 for approval. To be considered for this designated status, the program must have operated as an **ECS operator** for at least one year and must have a minimum enrollment of at least 10 program unit funded children. Newly designated programs will be subject to program review within the first year. The proposal should contain the following information:
  - a rationale for applying for status as a **Designated Special Education ECS program** including the potential benefits to children with severe special needs and their families. The rationale should also explain why the program could not operate as a regular **ECS program** and should highlight how receiving the designated status would resolve those issues;
  - an overview of the proposed program including population served, program format, service delivery model, support services provided, opportunities for inclusion, transition to the community **school** and a brief summary of the role descriptions of program staff;

- a proposed budget completed using Form 06AE2.3a. This budget should outline all estimated expenditures and projected revenues;
- c) **Designated Special Education ECS programs** must comply with all Conditions, Requirements and Considerations on Program Unit Funding outlined in Section 2.3 of this Manual. These programs must also comply with the principles contained in Alberta Education's *Kindergarten Program Statement Revised September 2005*.
- d) **ECS operators** who qualify for this status may claim all education program costs except capital building costs.
- e) A budget based on the total education program costs must be submitted on a PUF application for **Designated Special Education ECS programs**.
- f) Operation & Maintenance costs: This would include costs associated with the operation and maintenance of the **school** facility and would also include rent costs. PUF will cover costs that exceed the funding provided under Section 2.6 of this Manual.
- g) Administration: Reasonable costs for administration of the **ECS program** may be claimed here. Costs in this area are typically in the 6% to 12% range. System Administration funding revenues will be applied to these costs as per item (i).
- h) Capital costs must meet the specific needs of a program unit funded child or a group of program unit funded children to be eligible. An itemized list of capital must be included with the application if costs are claimed in this category.
- i) 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 program unit funding will apply.
- j) **Designated Special Education ECS programs** must maintain a minimum enrollment of at least 10 PUF children to retain their designated status. The **ECS operator** must notify the Director, Special programs Branch if enrollment declines below 10 **funded children**.
- k) Existing **Designated Special Education ECS programs** must apply to the Special Programs Branch to expand to another site or location.
- l) The status of approved **Designated Special Education ECS programs** may be reviewed and withdrawn at any time by Alberta Education.

Revised

## CONSIDERATIONS

1. A **child with a severe disability** 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 s/he is counted; and
  - b) is eligible to enter Grade 1 under the **school** entrance age policy of a **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 jurisdiction**, **parent** and **private ECS operator**, an **ECS program** is the most appropriate program for the child.
2. The following table shows how to calculate the ceiling amount for a program unit with one funded child in a program of **centre-based programming** hours, and also a program based on a combination of **centre-based ECS programming** hours and **family-oriented programming** sessions:

Calculation of the ceiling for <b><u>centre-based ECS programming</u></b> of 500 hours	Calculation of the ceiling for a <u>combined program</u> based on 500 <b>centre-based ECS programming hours</b> and 10 <b>family-oriented programming</b> sessions.
$\frac{500 \text{ hrs}}{800 \text{ hrs}} \times \$22,584$ $= \$14,115$	$\left\{ \frac{500}{800} + \frac{10}{36} \right\} \times \$22,584$ $= \$20,338$

Note: If the calculation results in a number higher than the ceiling amount then the ceiling would apply.

- Revised**
3. The PUF rates should be viewed as maximum ceilings only. Provincial statistics indicate the cost of most programs average about \$14,500 per PUF child. Careful stewardship of funds by **private ECS operators** is integral to the PUF program.



4. For a program unit with more than one funded child, the ceiling is calculated as follows:

- Choose the program unit funded child with the highest combination of **centre-based ECS programming** hours and **family-oriented programming** sessions.

$$\left\{ \frac{\# \text{ hours}}{800} + \frac{\# \text{ sessions}}{36} \right\} \times \$22,584$$

- To this amount, add, for each additional funded child in the program unit as follows:

$$+ \left\{ \frac{\# \text{ hours}}{800} + \frac{\# \text{ sessions}}{36} \right\} \times \$5,603$$

Example: For a program unit (cluster) of three funded children, where:

- Program unit funded child #1 has 500 hours and 10 **family-oriented programming** sessions
- Program unit funded child #2 has 400 hours, no **family-oriented programming** sessions
- Program unit funded child #3 has 600 hours and 4 **family-oriented programming** sessions

The ceiling is then calculated as follows:

$$\begin{aligned} & \left[ \frac{500}{800} + \frac{10}{36} \right] \times \$22,584 = \$20,388 \\ & + \left[ \frac{400}{800} \right] \times \$5,603 = \$2,802 \\ & + \left[ \frac{600}{800} + \frac{4}{36} \right] \times \$5,603 = \$4,825 \\ & = \text{Total ceiling for the unit} \quad \underline{\$28,015} \end{aligned}$$

5. Funding ceiling amounts will be adjusted when a funded child's program starts after the **count date** or ends prior to May 25. Funding ceiling amounts will also be adjusted when a funded child leaves the program earlier than planned. In these situations, the ceiling will be the lesser of:
- A pro-rated ceiling amount of approximately \$2,258 per month for the number of months the program runs; or
  - The ceiling amount based on **centre-based ECS programming** and the number of **family-oriented programming** sessions provided.

For example, the ceiling amount for a program unit funded child in a four-month program with 300 hours and 4 **family-oriented programming** sessions (formerly home visits) would be calculated as follows:

Ceiling calculation for a 4 month program in a 10 month program year	
Lesser of:	
a)	$\$22,584 \times 4/10 = \$9,034$ or
b)	$\$22,584 \times (300/800 + 4/36) = \$10,978$
Ceiling amount is \$9,034	

#### 6. **Family-oriented Programming Sessions:**

The following are examples of what can be counted as an eligible family-oriented programming session:

- a teacher provides **family-oriented programming** to a child and his/her **parent** for a minimum of 1.5 hours;
- a teacher or SLP (under the direction of the teacher) provides two 45 minute sessions to 2 children and their **parents** or alternate caregivers at the **school**;
- an occupational therapist, under the direction of the teacher, provides intervention that involves both the child and the **parent/caregiver** for 1.5 hours;
- an in-home consultant models behavior management strategies with the child and provides a rationale to the **parent/alternate caregiver** for 1.5 hours;
- teacher facilitates four 1.5-hour "play dates" with four children and their **parents/alternate caregivers**. For this example, one session may be claimed for each child;
- a family liaison worker accompanies **parent** and child to a grocery store and demonstrates strategies for incidental teaching of social skills and early academic skills for 1.5 hours;
- a consultation with medical personnel and/or psychologists, that involves the child's learning team and occurs outside the centre, must be a minimum length of 45 minutes and can be counted as a 0.5 session. A school authority can claim a maximum of one session per child per year for consultation.

The following cannot be counted as an eligible **family-oriented programming session**:

- informal **parent** contact or contact that is typically required as a component of a school-based special education program (e.g. **IPP** meetings; concerts; classroom parties);
- contact with **parents** or alternate caregivers occurring during the time that is already claimed under centre-based hours;
- time involved in travel to and from child's home or childcare centre;
- intervention provided by a member(s) of the child's learning team to the child that does not involve the **parent**/caregiver;
- provision of therapy that is not directly related to the goals in the child's **IPP**;
- informal visits to the home;
- information contact by **school** personnel;
- telephone calls;

7. **Private ECS operators** may appeal PUF decisions by writing the Director of Special Programs Branch.

## REFERENCES

*ECS Program Unit Funding: A Handbook for ECS Operators*

## **PURPOSE**

This funding enables **private ECS operators** to provide transportation for **eligible transported ECS children** to and from their **ECS program**.

## **CONDITIONS**

Revised

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. **Private ECS operators** with **children with special needs** (mild, moderate or severe) that reside less than 2.4 kilometers from **the private ECS program** who can ride regular transportation to and from school, may claim this funding. If a claim is made under this section, no other transportation funding to and from the **ECS program** may be claimed for these children.
3. Transportation costs incurred for field trips or other activities cannot be claimed under this funding. For **children with severe disabilities**, these costs can be claimed under the Program Unit Funding (PUF).

## **REQUIREMENTS**

1. 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.
2. 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 with the company or person(s) transporting the **eligible transported ECS child**.
3. The following applies for parent provided transportation where there is a written agreement or contract in place:
  - a) **parents** who transport their own child(ren) only require a class 5 operator's license and their own liability insurance.
  - b) **parents** or other individuals who use their own vehicle to transport a child that is not their own, require a class 4 operator's license and a minimum of \$2 million of liability insurance.

4. To apply for ECS Regular Transportation funding, **private ECS operators** are required to submit electronically their ECS transportation claim form to the Financial Reporting and Accountability Branch by November 30. Payment is made on the basis of 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 1.19, Rural Transportation; Section 1.20, Urban Transportation; and Section 1.22, Metro Urban Transportation Block.
5. For **ECS programs** beginning in September, transportation funding is based on **funded child** registration information as of the **count date** and submitted to the Information Services Branch by October 5.
6. 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 Financial Reporting and Accountability Branch within three weeks of that date.
7. **Eligible transported ECS children** registered after the **count date** are not eligible for regular transportation funding.

## CONSIDERATIONS

1. A **private ECS operator** may receive transportation funding for each **eligible transported ECS child** and transported by:
  - a) a **school bus**;
  - b) a **parent** where the **private ECS operator** does not provide bus services.
2. **Private ECS operators** may enter into 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.
3. 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 amount of the fee shall not exceed the total cost of the provision of ECS transportation services less the ECS transportation funding received from Alberta Education.
4. Regular transportation funding is calculated by multiplying the number of **eligible transported ECS children** by the regular transportation rate for **private ECS operators**.

## **PURPOSE**

**Revised**

This funding is provided to **private ECS operators** for the transportation of **children with a disability/delay** to and from an **ECS program** who cannot be accommodated by regular transportation. This funding also provides for the transportation of a teacher, a child development specialist, or a teacher assistant to the home of a **child with a severe disability** receiving **family-oriented ECS programming**.

## **CONDITIONS**

### **1. Special Transportation**

- a) **Private ECS operators** may receive Special Transportation funding for ECS **children with a disability/delay** who cannot be accommodated by regular transportation because of their disabilities and, therefore, require special transportation, such as a handi-bus.
- b) Special Transportation funding is also provided for ECS **children with special needs** who, because of their young age, are not able to ride regular transportation. This includes **children with a severe disability/delay** (ages 2.5 to 4.5 years), and **children with a mild or moderate disability/delay** and **funded children** who are gifted and talented (ages 3.5 to 4.5 years).
- c) program or **school** location shall not be considered when determining eligibility for this funding.

### **2. Family-Oriented Programming Transportation Funding**

**Revised**

- 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** receiving **family-oriented programming**.
  - b) Transportation funding is provided for each session up to 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 a severe disability/delay** these costs may be claimed under Program Unit Funding.

**REQUIREMENTS**

1. An **ECS operator** that claims ECS special transportation funding must transport, or make arrangements for the transportation of **children with special needs** attending the **ECS program**. Transportation funding cannot be claimed if the **private ECS operator** has not provided or arranged transportation or if no cost was incurred by the **private ECS operator** to transport a **funded child**.
2. If the transportation of **children with special needs** is not done by the **ECS operator**, then a contract or signed agreement must be in place with the company or person(s) transporting the children.
3. The following applies for parent provided transportation where there is a written agreement or contract in place:
  - a) **parents** who transport their own child(ren) only require a class 5 operator's license and their own liability insurance.
  - b) **parents** or other individuals who use their own vehicle to transport a child that is not their own, require a class 4 operator's license and a minimum of \$2 million of liability insurance.
4. To apply for ECS Special Transportation funding, **private ECS operators** are required to submit their ECS transportation claim form electronically to the Financial Reporting & Accountability Branch by November 30. Payment is made on the basis of submitted information, funding conditions and funding rates. Please note that the electronic ECS transportation claim form can be used to claim both regular and special transportation.

The special transportation funding provided for **ECS children** is calculated by multiplying the number of **children with special needs** who require special transportation because of their disability or young age by the number of days transported. The total transportation days are multiplied by the special transportation rate.

Funding for **family-oriented programming** sessions delivered by a teacher or other professional is calculated by multiplying the number of scheduled **family-oriented programming** sessions by the special transportation rate.

4. **Private ECS operators** are to maintain records of:
  - names of children transported;
  - number of days each individual child is transported;
  - number of **family-oriented programming** sessions;
  - actual costs of transportation; and
  - special transportation provided.

5. For **ECS programs** beginning in September: transportation funding is based on funded child registration information as of the **count date** and submitted to the Information Services Branch by October 5.
6. 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 Financial Reporting and Accountability Branch within 3 weeks of that **count date**.
7. **ECS children with special needs** registered after the **count date** are not eligible for special transportation funding. Transportation costs for **ECS children with a severe disability/delay** eligible to receive PUF may be claimed as a Program Unit expense.

## **CONSIDERATIONS**

1. A **private 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 amount of the fee shall not exceed the total cost of the provision of ECS transportation services less the ECS transportation funding received from Alberta Education.



## **PURPOSE**

This funding, provided to **private ECS operators**, is for the maintenance and operation of **school** buildings that are safe, comfortable and suitable learning environments for children.

## **CONDITIONS**

1. Funding for plant operations and maintenance is based on:
  - a) the number of **funded children** in ECS;
  - b) the area in square meters is based on an allocation of forty (40) square meters for every twenty-five (25) **funded children** in the program or portion of 25 **funded children**.

## **REQUIREMENTS**

1. A **private ECS operator** is not required to apply for Plant Operations and Maintenance funding; Alberta Education determines an operator's eligible funding using funded enrollment information.

## **CONSIDERATIONS**

1. Example of calculating Plant Operations and Maintenance funding for an **ECS program** of 15 **funded children**.

$$\begin{aligned} & (\# \text{ funded children} \times \text{rate per funded child}) + (\text{Area rate per 25 funded children}) \\ &= (15 \times \$251) + (\$502) \\ &= \$4,267 \end{aligned}$$

2. Example of calculating Plant Operations and Maintenance funding for an **ECS program** of 40 **funded children**.

$$\begin{aligned} & (40 \times \$251) + (\$502 \times 2) \\ &= (\$10,040) + (\$1,004) \\ &= \$11,044 \end{aligned}$$

\$502 is provided for every 25 **funded children** or portion of 25 **funded children**.

## **PURPOSE**

This funding provides for effective and efficient administration of **private ECS operators**.

## **CONDITIONS**

1. Funding for administration is based on 6% of the total ECS funding a **private ECS operator** receives from Alberta Education for the following areas:
  - a) base instruction;
  - b) special needs funding (including mild/moderate and gifted and talented funding, and finalized program unit funding);
  - c) transportation (special and regular); and
  - d) plant operations and maintenance.

## **REQUIREMENTS**

1. A **private ECS operator** is not required to apply for administration funding; Alberta Education determines the **private ECS operator's** eligible funding using information on student enrollments and funding that Alberta Education provides for instruction, special needs funding, plant operations and maintenance and student transportation.

## **CONSIDERATIONS**

1. For **private ECS operators** offering a PUF program: although ECS Administration funding is calculated initially on the approved PUF budget, this funding will be adjusted based on the final PUF amount approved (lesser of budget, actual costs or ceiling total).

## **PURPOSE**

**Revised**

This funding enables **accredited-funded private schools** to provide instructional programs and services for **funded students** including **students with special needs**.

## **CONDITIONS**

1. **Accredited-funded private schools** must provide students with access to:
  - up to 950 hours of instruction for Grade 1;
  - a minimum of 950 hours of instruction for Grades 2 to 9;
  - a minimum of 1000 hours of instruction for Grades 10 to 12; and
  - a minimum of 25 hours of instruction per high school credit timetabled for both the student and teacher in the same time period.
2. Base Instruction funding is provided for each **funded student** in Grades 1 to 12. Base Instruction funding also support programs for students with mild and moderate disabilities and students who are gifted and talented. **Accredited-funded private schools** should pool special education funding and utilize it for the provision of programs to support **students with special needs**.
3. All individuals who are at least 6 years of age but less than 20 years old on September 1 may be eligible for this funding. See definition of **funded student** in the Glossary of Terms.
4. All individuals aged 5 years and 6 months or older, but less than 6 years old on September 1 are counted as **funded students** if they are eligible to enter Grade 1. See definition of **funded child** and **funded student** in the Glossary of Terms for exceptions.
5. Under no circumstances can an individual be counted as both a **funded student** and as a **funded child** in the same school year.
6. An individual who is eligible to proceed to Grade 1 and is less than 7 years of age on September 1 who has been identified as **developmentally immature** and whose program plan involves both ECS and Grade 1 instruction may be counted either as a **funded child** or as a **funded student**.
7. High school courses taken by Grade 9 students in the summer program, prior to the start of their Grade 10 fall term, will not be included in the calculation of the 60 CEU annual limit for funding outlined in Condition #9.

## 8. Course Completions for Students in Grades 10 to 12

Base Instruction funding for senior high school students is based on the principle that instructional services are provided and courses are completed. Instructional services must be timetabled for both students and teachers and ensure that students have access to at least 25 hours of instruction per high school credit.

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 must also comply with all other Alberta Education policies, regulations and legislation, and the *School Act*. See the General Conditions that Apply to Funding in the Introduction section of this Manual. Among the conditions that all courses must meet are the following:

- Teachers who provide or supervise the instruction have valid Alberta Teaching Certificates and are expected to have the knowledge, skills and attributes appropriate to teachers as outlined in the Teaching Quality Standard applicable to the Provision of Basic Education in Alberta.
  - Students have access to a minimum of 25 hours of instruction per credit. Instructional time does not include convention days, professional development days, **parent**-teacher interview days, teacher planning days, staff meetings, statutory and **school authority** declared days, lunch breaks, breaks between classes, supervised study halls, time taken for the registration of students, or extracurricular activities.
  - Teachers offer the course in accordance with the approved Programs of Study.
- a) A regular course (non-Career Technology Studies) submitted as complete (COM) or withdrawn (WDN) is considered completed for funding purposes when:
- i) a student has earned a final mark of 50% or better in the course; or
  - ii) a student has earned a final mark of 25% or greater but less than 50% in the course, and has attended at least 50% of the classes in the course or has worked on and been assessed on at least 50% of the course content.

For diploma examination courses condition 8(a) also applies to the **school-**awarded portion of the mark.

- b) For regular courses submitted as complete (COM) or withdrawn (WDR) and delivered to students on-line or by distance learning the attendance funding criteria may not apply. Funding will be provided if the student has:
- i) earned a final mark of 50% or better in the course; or
  - ii) earned a final mark of 25% or greater but less than 50% in the course and has worked on and been assessed on a least 50% of the course content.

**Revised**

- c) For all regular courses (non-CTS), **accredited-funded private schools** must maintain course outlines, detailed assessment records of student work in the course, records of student withdrawal, student attendance, and final marks. Also see the Requirements in this section for more details.
- d) A one credit CTS submitted as complete (COM), incomplete (INC) or withdrawn (WDR) course is considered completed for funding purposes when a student has worked on and been assessed on at least 50% of the course content.
- e) Funding will not be provided for a CTS course if the prerequisite(s) was not completed in the same term or a prior term.
- f) For all CTS courses, **accredited-funded private schools** must maintain course outlines, detailed assessment records of student work in the course records of student withdrawal and final marks. Also see the Requirements in this section for more details.
- g) Students are not restricted in the number of credits they can take in a school year.
- h) Course Completion Status Codes:

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

- A “complete” (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.
- A “withdrawal” (WDR) status should be used when a student chooses not to complete a course and the **accredited-funded private 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.
- An “incomplete” (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). A course completion of (INC) may only be used for CTS courses.
- When a course is reported as eligible for funding, all funding conditions must be met and all supporting documentation maintained, regardless of the completion status report.

## 9. Funding for Funded Students in Grades 10 to 12

Base Instruction funding for students in Grades 10 to 12 is based on the following:

- a) funding is provided on a Credit Enrollment Unit (CEU) basis for senior high school courses completed during regular daytime hours, weekends, evenings and the summer months, with a maximum of 60 CEUs funded per student per school year (September to August). For senior high school courses with a credit value of 3, funding is based on 2.5 CEUs. For courses with a credit value of 5, funding is based on 5 CEUs. For courses with a credit value of 1, funding is based on 1 CEU;
- 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:
  - 80 hours for a five credit course; or
  - 48 hours for a three credit course.
- c) funding is provided for Alberta Distance Learning (ADL) courses paid by an **accredited-funded private school** for students whose marks are reported by the ADLC;
- d) funding is provided for RAP, Work Experience, and other credit courses involving substantial off-site instruction;
- e) funding is provided for repeated courses if instruction is provided in accordance with the same requirements as the first time the course was taken. Funding is not provided for students repeating courses where they previously received a final mark of 100% in the course;
- f) funding is provided for high school credit courses completed that may not otherwise be counted towards a high school diploma (e.g. ESL 1125);
- g) funding is provided for locally developed senior high school credit courses, where instruction is provided; and if the **accredited-funded private school** is authorized to deliver the course (see Guide to Education –section on Locally Developed/Acquired and Authorized Junior/Senior High Optional Courses).

**Revised**

(Work Experience, RAP, and Special Projects courses are exceptions to these rules - see the *Guide to Education* for more details)

**New**

School authorities offering locally developed senior high school complementary courses must be granted the use of a course code by Alberta Education to receive the relevant Credit Enrollment Unit (CEU) funding. Course codes are provided to school authorities, valid for a specified term, for each senior high school locally developed course that has been locally authorized through a board motion and meets policy requirements and submission deadlines.

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

For additional information, please refer to *Policy 1.2.1 – Locally Developed/Acquired and Authorized Junior and Senior High School Complementary Courses* at [www.education.gov.av.ca/EducationGuide/polplan/polregs/121.asp](http://www.education.gov.av.ca/EducationGuide/polplan/polregs/121.asp).

- h) funding is provided for credit-bearing religious education courses, where instruction is provided;
- i) funding is provided for credits in Special Projects 10 – 20 – 30 courses;
- j) funding is provided for students in senior high school who take a junior high course for 125 hours; the equivalent of 5 CEUs will be funded for each course completed (Form 06AE1.2a);
- k) for senior high school **students with special needs** (identified with the 500 grants code), funding is provided based on 35 CEUs. Additional funding based on CEUs will be provided for course credits completed in the summer months by **students with special needs**;
- l) 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 CEU value;
- m) students registered on the **count date** 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 CEUs per student per semester of ESL courses taken. No additional funding is provided for other courses completed during these semesters. Students taking ESL courses or non-ESL courses during the summer will be funded on a CEU basis;
- n) funding is provided for credits granted through **challenge assessments** at 20% of the CEU value for the course(s) challenged;
- o) when a student takes two French as a Second Language courses by instruction in the same term only one course will be funded unless 25 hours of instruction per credit is provided;
- p) funding based on 35 CEUs is provided for senior high school students enrolled in Institutional programs (code 550) on the **count date**;

**Revised  
Updated**

**Revised**

- New** q) funding based on 35 CEUs is provided for **high school refugee students** (code 640). **High school refugee students** enrolled in Home Education programs, **Blended programs**, **Outreach programs** or **On-line programs** are not eligible for this funding.

10. **CEU Funding Recovery Schedule**

- a) A 10% funding recovery will be applied for the following Access to Instructional Hours violations:
  - i) Courses where access to instruction is found to be less than 25 hours per high school credit (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 enrollments 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.
  - iv) Where a high school student does not have access to at least 1,000 hours of instruction.
- b) A 100% funding recovery will be applied when:
  - i) Courses taught did not follow the Program of Studies.
  - ii) A school that has been previously assessed a penalty, continues to be non-compliant.
  - iii) Courses have both access to instruction and Program of Studies contraventions.
- c) A 75% funding recovery will be applied when:
  - i) Special Projects do not meet the programming requirements set out in the Guide to Education.

11. **Payment Not Provided for Funded Students in Grades 10 to 12**

Base Instruction funding for students in Grades 10 to 12 is **not** provided for:

**Updated**

- a) waived or retroactive credits;
- b) maturity credits;
- c) high school credits taken by junior high students (except for summer courses, if the student taking the course is eligible to enter Grade 10 in the next school year); this includes CTS courses completed by students in junior high school and Heritage Language high school credit courses;
- d) post-secondary courses, including those that have been approved as locally developed courses;
- e) credits granted through evaluation of out-of-province courses; or
- f) extra-curricular, co-curricular or community-based activities, such as competing on an athletic team.



12. New **private schools** must obtain accreditation through the Governance Support Branch. Final approval is given by the **Minister**. Newly qualifying **private schools** will indicate:
- a) the **school** is operated on a non-profit basis and is incorporated under the *Societies Act* or registered under Part 9 of the *Companies Act* or is incorporated under an act of the Legislature; and
  - b) the **parents of funded students** enrolled in the **school** are ordinarily residents of Alberta. (*School Act*, Section 273).
13. An **accredited funded private school** must keep in force a blanket fidelity bond with respect to the **private school** for all employees and **board** members in an amount acceptable to the **Minister**. The amount that is acceptable to the **Minister** shall be \$50,000 or the amount of the accumulated surplus plus 40% of Alberta Education funding for the program year (the value of the first payment in the first month of operation), whichever is less.

Agents may refer to this as a “commercial blanket bond”. With blanket bonding, no criminal investigation need be made before bonding and the insurance company need not assign blame for the **school** to be reimbursed in the event of defalcation of funds.

Revised

- 14. a) To receive funding, an accredited funded private school must have seven full-time equivalent or more students enrolled from two or more families who continue to be enrolled in the **school**. The seven full-time students must not include ECS children and students enrolled in home education programs or the percentage of a student’s time for the home education portion of a **blended program**. The **accredited-funded private school** must notify the Director, Governance Support Branch if enrollment drops below seven full-time equivalent students or if enrollment does not come from two or more families.
  - b) An **accredited-funded private school** accredited through the Governance Support 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**.
15. Payments to a newly qualifying **accredited-funded private school** will begin when all funding conditions have been met to the satisfaction of the **Minister**. Applications should be submitted to the Governance Support Branch.
- Payments will discontinue if the **accredited-funded private school** fails to meet one or more funding conditions.
16. Where the enrollment in an accredited funded private school drops by more than 50% in a school year, the **Minister** may authorize a reduction in payments due to the **school**.

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## REQUIREMENTS

### 1. New **accredited-funded private schools**

The form “Annual Operational Plan” (AOP) will be sent to new **accredited-funded private schools** by the Governance Support Branch. New **accredited-funded private schools** are required to provide:

- a) a Certificate of Incorporation under the *Societies Act* or a non-profit company registered under Part 9 of the *Companies Act* or a special act of the Legislature;
- b) documented proof that their **facility** meets all applicable municipal and provincial public health, fire safety and building standards requirements; and that the operator has appropriate insurances in place, and
- c) a signed declaration (part D of the Annual Operational Plan) that the program will operate in accordance with the *School Act*, section 28.

### 2. Existing **accredited-funded private schools**

The form, “AOP”, a comprehensive Notice of Intent to Operate, will be sent to **accredited-funded private schools** by the Zone Services Branches in April. **Accredited-funded private schools** may be required to provide documentation such as the current status of their Certificate of Incorporation and proof that their **facility** meets fire and health safety standards.

The AOP incorporates the *Learning Grants Regulation A.R. 77/2003*, and the operator is bound by all the provisions of that Regulation including the right of Alberta Education to require the return of any monies paid to the operator if the AOP contains any false, misleading or inaccurate information or if the operator fails to advise the appropriate Zone Services Branch, Alberta Education of any changes in any information contained in the AOP.

3. **Accredited-funded private schools** must complete and return the “AOP”, to their respective Zone Services Branch or complete an electronic version through the Extranet by May 31. Information on this form initiates the first payment of the coming school year.
4. All **accredited-funded private schools** must advise their respective Zone Services Branch within one week of any changes which occur in **facility**, society, or programs during the school year.
5. Accredited **private schools** must send an updated list of teaching staff (based on teachers employed as of September 15) to their respective Zone Services branch by September 19, including those who have been hired subsequent to May 31. Any changes to teaching staff after September 15, should be submitted to their respective Zone Services Branch within one week of any changes.

6. Base Instruction funding is based on:
- a) student registration enrollments in Grades 1 to 9 as of the **count date** that are submitted to Information Services by October 5;
  - b) course completion information for students in Grades 10 to 12 as follows:
    - i) Student Information System for specific enrollment; and
    - ii) Student Records System / Course Information Database System (CIDS) for course marks;

**Note: Schools** are required to maintain and retain 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.
  - c) student information on Form 06AE1.2b for students attending First Nations **schools**.
  - d) student information on Form 06AE1.2a for senior high students taking junior high courses.
7. Base Instruction funding for an **accredited-funded private school** is calculated as follows:
- a) for Grades 1 to 9, by multiplying the number of **funded students** enrolled on the **count date** by the Base Instruction rate; and
  - b) for Grades 10 to 12, by multiplying the completed CEUs by the CEU rate, with a maximum of 60 CEUs per student per school year (Sept. to Aug.).
8. Adjustments to enrollment data:
- a) if an adjustment is required to the **count date** enrollment data reported to the Information Services Branch, **accredited-funded private schools** must ensure that changes are made to their modification file; and
  - b) after receiving your January payment details or your first RACERS data, any modification required can be submitted using the “Add, Modify, Delete” form (Form 06AE1.2c) or submitted using the Funding Event System (FES) by the April 30 deadline.
9. Refer to Section 8.7 for additional information on Enrollment Counts and Conflicts.

**New** 10. To receive 35 CEUs of Base Instruction funding for **high school refugee students, accredited-funded private schools** must:

**Updated** a) have one of the following documents on file from Citizenship and Immigration Canada:

- Notice to Appear
- Refugee Protection Claimant Document
- Notice of Decision
- Immigration Visa and Record of Landing indicating status as Convention Refugee
- Confirmation of Permanent Resident indicating status as Convention Refugee

## CONSIDERATIONS

1. For Grades 10 to 12, when a student transfers from one high school to another during a term in which a course is offered, the **school authority** that provided the majority of instructional minutes may request the funding from Alberta Education.

## FEES AND DEDUCTIONS:

1. Access Copyright (formerly Cancopy):

Alberta Education has an agreement with the Canadian Copyright Licensing Agency (Access Copyright). Most **schools** in the province are covered in the license. Alberta Education makes the payment for the license on behalf of all participating **accredited-funded private schools**. The cost of the license, plus GST, is recovered from **accredited-funded private schools** on a full-time equivalent student basis.

2. EduLink:

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

The College of Alberta School Superintendents (CASS) and Association of School Business Officials of Alberta (ASBOA) have agreed their membership will provide the necessary funds to support EduLink for a three-year period – from September 2005 to August 2008. Alberta Education will deduct approximately 35¢ plus GST per **funded student** and **funded child** on behalf of all participating **accredited-funded private schools**. This deduction will be made in September and based on the prior year frozen **funded student** and **funded child** count. The deduction will be reflected on the September funding statement. It is up to the individual **accredited-funded private schools** to apply for any GST rebate from the Government of Canada.

**Revised** Alberta Education will forward the maintenance fee of \$200,000 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.

PURPOSE

UPDATED

This funding provides support to **Designated Special Education Private Schools (DSEPS)** for the instruction of **students with special needs**.

CONDITIONS

1. Funding is provided for **students with special needs**, who meet Alberta Education special education eligibility criteria, who are enrolled on the **count date**. Students without special needs attending **DSEPS** with a sibling(s) who has special needs will be funded at the regular **private school** Base Instruction funding rate.
2. Funding is only provided to **DSEPS** that have been approved by the **Minister**. To obtain approval for this status the **private school** must send a request in writing to the Director of Special Programs Branch, Alberta Education, by March 31 for the upcoming school year. The Director will review the request to determine if the operator meets or exceeds Alberta Education standards for special education programming and that students attending the **school** meet eligibility requirements for special education. The status of approved **DSEPS** may be reviewed and withdrawn at any time by Alberta Education.
3. No satellite campuses for existing **DSEPS** will be approved without written consent of the Director of Special Programs Branch. Requests for satellite campuses must be submitted by March 31.

REQUIREMENTS

1. The **DSEPS** must advise **parents** of the need to discuss their **child's mild or moderate disability** or gifted and talented special needs eligibility 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 inform the **parent(s)** that their child has been assessed as having a mild or moderate disability or being gifted and talented;

- 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;
- 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**.

2. One of the following types of documentation must be kept on file at the **DSEPS** to confirm the parent consultation:
  - a signed registration form at the **DSEPS** which contains a statement declaring that the **parent** consulted with their **resident board**; or
  - a signed letter from the **parent** attesting that they consulted with the **resident board**; or
  - a letter from the **resident board** official confirming that the **parent(s)** consulted with them on their special needs child's programming options.
3. When a student with a mild or moderate disability or who is gifted and talented is enrolled in a **DSEPS**, and whose **parent** consulted with the **resident board**, instruction funding of \$9,727 per student will be paid directly to the **DSEPS**, with no cost to the **resident board** if enrollment occurs on or before the **count date**. These students must be coded by the **DSEPS** using the funding grant codes 110 and 500 with the applicable mild/moderate 50's code or gifted and talented 80 code.
4. If a **parent** enrolls their child with mild or moderate disabilities or a child who is gifted and talented in a **DSEPS** without consulting with the **resident board** on the child's eligibility for special education programming, the **DSEPS** will be eligible for funding of \$6,058 (rather than funding of \$9,727) per student. These students must be coded by the **DSEPS** using the grants code 500 with the applicable mild/moderate 50's code or gifted and talented 80's code. The grants 110 Code cannot be used for these students.
5. For **students with severe disabilities** attending a **DSEPS**, instruction funding of \$6,058 and severe disabilities funding will be provided to the **DSEPS**. The 110 Code cannot be used for these students. The **DSEPS** must use the grants code 500 with the applicable severe disabilities 40's code. **DSEPS** will not be funded for credits a student with severe disabilities earns in excess of 35 credits in a school year.
6. The **DSEPS** shall report all students enrolled on the **count date** in their **school** to the Information Services Branch by October 5.

Revised

7. **DSEPS** must notify **school boards**, in writing, of the **board's resident students** who are registered at the **DSEPS**. This list should indicate:
- which students' **parents** consulted with the **resident board** on the special education programming options for their **funded student** prior to enrollment at the **DSEPS**; and
  - which students are newly enrolled; and
  - which students are currently attending who were enrolled in previous years.

A copy of this notification list must also be sent to the Director of the School Finance Branch, Alberta Education by December 15, confirming which of the students' **parents** discussed special education programming and placement options with their **resident board** and which did not.

**Updated**

For students whose **parents** consulted with their **resident board**, please attach to the notification list sent to the School Finance Branch, a copy of the documentation referred to in Requirement #2 that confirms parent consultation. This confirmation will determine the basis of Alberta Education's payment to the **DSEPS**.

**CONSIDERATIONS**

1. The higher instruction rate will be provided for students with mild/moderate disabilities and students who are gifted and talented whose **parents** placed them in the **DSEPS** prior to the **count date** for 1998 as long as they are attending the **DSEPS**.
2. For students with a mild or moderate disability or students who are gifted and talented enrolled with a **school jurisdiction** on the **count date** who transfer to a **DSEPS** after the **count date** in the current school year (or vice versa), funding will no longer be required to be transferred by the **school jurisdiction** or by the **DSEPS** on a pro-rated basis. No pro-rated funding will be provided by Alberta Education to the **DSEPS** for students enrolled after the **count date**.
3. A **school jurisdiction** that directs a student to a **DSEPS** will pay all program costs that are not covered by funding provided by Alberta Education to the **DSEPS**.

## **PURPOSE**

This funding provides for programs that meet the special education needs of **students with a severe disability**.

## **CONDITIONS**

1. **Accredited-funded private schools** and **charter schools** will use the severe disabilities categories and codes outlined in the definition of **student with a severe disability** in the Glossary of Terms, and the *Handbook for the Identification and Review of Students with Severe Disabilities* to determine a student's eligibility and to properly code the child for funding purposes.
2. **Charter schools** that have eligible **students with a severe disability** must comply with the Conditions and Requirements in this section for funding purposes.
3. Severe disability funding for **students with a severe disability** attending an **accredited-funded private school**, including **Designated Special Education Private Schools (DSEPS)**, and **charter schools** will be based on the **count date** enrollments as reported by the **accredited-funded private school** to the Information Services Branch (See Requirement #2). Severe disability funding will be paid directly to the **DSEPS** and **accredited-funded private school** for eligible **students with a severe disability**.
4. The eligibility of new students will be audited by the Special Programs Branch in the first year they are claimed for funding by the **accredited-funded private school**, or **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.
5. Severe disability funding for an **accredited-funded private school** or **charter school** is calculated by multiplying the number of eligible **students with a severe disability** by the severe disabilities funding rate.
6. **Accredited-funded private schools** providing an approved institutional program may not claim severe disabilities funding for **students with a severe disability** who are funded through **institution** program funding.
7. **Students with a severe disability** enrolled in an **on-line program, blended program** or a home education program are not eligible for severe disabilities funding.



**REQUIREMENTS**

1. **Accredited-funded private schools** and **charter schools** must develop and implement an **Individualized Program Plan (IPP)** supported by appropriate medical, psychiatric, psychological and/or other professional documentation for each **student with a severe disability** identified and attending the **private school**.

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 (note: a diagnosis alone is not sufficient to qualify for funding);
  - b) documentation/assessments of the student's current level of functioning in the learning environment;
  - c) a current **Individualized Program Plan (IPP)** which addresses the student's diagnosed needs; and
  - d) identification of the types of support and services being provided to the student. Students claimed for this funding must receive three or more of the following types of support:
    - i) specialized equipment or assistive technology;
    - ii) assistance for basic care (e.g., toileting, grooming, catheterization);
    - iii) a minimum of 0.5 FTE one-on-one instruction/intervention/support (e.g., specialized teacher and/or teacher assistant);
    - iv) frequent documented monitoring of medical and/or behaviour status;
    - v) direct specialized services represent a cost to the system (e.g., behaviour specialist, orientation and mobility specialist).
2. Eligibility for severe disability funding is based on student registration information, as of the **count date**, that has been submitted to the Information Services Branch by October 5. **Accredited-funded private schools** (including **DSEPS**) and **charter schools** must also send the electronic Special Programs Branch Report that lists the students identified with severe disabilities by October 5.
  3. Students who are registered with a **school jurisdiction** on the **count date** and are coded as having a severe disability, who then move after the **count date** to an **accredited-funded private school** (including **DSEPS**), and **charter schools** may be claimed for pro-rated severe disabilities funding. Pro-rated funding for eligible students may be claimed from Alberta Education using the March 1 enrollment count date. Funding will be provided at 50% of the rate for **students with a severe disability**.

This would also apply to students who move from an **institution** (e.g., a hospital program, young offender centre, etc.) to an **accredited-funded private school** (including **DSEPS**) or a **charter school**. Funding provided to the **school authority** where the student was originally registered will not be affected or pro-rated.

This pro-rated funding, based on the March 1 enrollment count, will also apply to newly identified/diagnosed **students with a severe disability** who were not identified by the original **school authority** but were identified as a **student with a severe disability** after transferring to an **accredited-funded private school** or a **charter school**.

**Students with a severe disability** who were not registered with any **school authority** as of the **count date**, and who are registered in an **accredited-funded private school** or a **charter school** after the **count date**, may also be claimed for pro-rated severe disabilities funding.

**Accredited-funded private schools** and **charter schools** should identify these students to the Information Services Branch using the March 1 enrollment count date and provide a Special Programs Branch Report of the students identified to the Special Programs Branch.

4. For **students with a severe disability** who transfer from an **accredited-funded private school** or a **charter school** to a **school jurisdiction** after the **count date**, severe disabilities funding must be transferred by the **accredited-funded private school** to the jurisdiction on a pro-rated basis based on a 10-month program year.
5. For **students with a severe disability** who transfer from an **accredited-funded private school** (including **DSEPS**) or a **charter school** to a different **accredited-funded private school** or a **charter school** after the **count date**, severe disability funding must be transferred from the first **accredited-funded private school** or a **charter school** to the second **accredited-funded private school** or a **charter school** on a pro-rated basis, based on a 10-month program year.

## REFERENCES

*Requirements for Special Education in Accredited-Funded Private Schools (2006)*  
*Standards for Special Education, Amended June 2004 (Designated Special Education Private Schools)*  
*Handbook for the Identification and Review of Students with Severe Disabilities*

**PURPOSE**

This funding to is provided to associate **accredited-funded private schools** to assist parents who are educating their children at home.

**CONDITIONS**

1. Home Education instruction funding may be provided to an associate **accredited-funded private school** for **home education students** that the **school** has agreed to supervise and provide with education resources. 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*.
- Revised** 2. Additional funding may be provided to the associate **accredited-funded private school**, for eligible course costs for **home education students** in Grades 7 to 12 enrolled by the **school** in Alberta Distance Learning (ADL) courses at the Alberta Distance Learning Centre (ADLC). The funding provides for 50% of the cost of the ADLC's course tuition fees, lesson materials and resources (net of any refund) up to a maximum equivalent to the Home Education instructional funding amount. This funding may be claimed on Form 06AE1.4a.
- Revised** 3. Additional funding may be provided to the associate **accredited-funded private school** for eligible course costs for **home education students** in Grades 1 to 6 taking a full course load of ADL courses through the ADLC. The funding provides for the cost of ADLC course tuition fees, lesson materials and resources (net of any refund) that is in excess of the required 50% Home Education instruction funding allocated for the purchase of courses and instructional materials –whether the funding was retained by the associate **accredited-funded private school** or provided to the **parents** (see Allocation Criteria # 9). This funding may be claimed on Form 06AE1.4b.
- Revised** 4. Students enrolled in Grades 1 to 9 who are participating in a **blended program**, and accessing at least 50% of their education courses at **school**, may be claimed as **funded students** by the associate **accredited-funded private school**. Alberta Education will prorate the funding provided based on the percentage of the student's courses taken at **school**, and the percentage of the courses taken at home.
- Revised** 5. Students enrolled in Grades 10 to 12 who are participating in a **blended program** and accessing at least 20% of their education courses at **school** may be claimed as **funded students** by the associate **accredited-funded private school**. Alberta Education will prorate the funding provided based on the percentage of the student's courses taken at home and the percentage of the student's courses taken at **school**.

6. **Revised** In accordance with Section 8 of the *Home Education Regulation*, an associate **accredited-funded private school** shall provide to a **parent** of a student enrolled in a **blended program**, 50% of the Home Education instruction funding that is based on the percentage of the home education program.
7. **Revised** When a **home education student** in grades 7 to 12, who is taking ADL courses through the ADLC, moves from one associate **accredited-funded private school** to another after the **count date**, and the receiving associate **accredited-funded private school** also enrolls the student in ADL courses through the ADLC; Alberta Education will pay 50% of the eligible ADL course costs combined for both associate **accredited-funded private schools** –up to a maximum equivalent to the Home Education funding amount. This funding may be claimed on Form, 06AE1.4a.
8. **Home education students** and their **parents** must be living in Alberta on the **count date** of the current school year.
9. **Revised** An associate **accredited-funded private school** must offer to the **parents** of a **home education student** not less than 50% of the Home Education instruction funding for the purchase of instructional materials. If the **home education student** is enrolled by the associate **accredited-funded private school** in ADL courses at the ADLC with the **parents'** permission, the **accredited-funded private school** may use some or all of the parents 50% funding to pay for the cost of the courses and required instructional materials.
10. **Home-education students** are not eligible for Severe Disabilities funding.

## REQUIREMENTS

1. **Parents** are responsible for notifying their associate **accredited-funded private school** of their decision to provide a home education program for their children. **Parents** must fulfill this requirement by submitting all parts of the *Home Education Regulation* Notification Form No. 2 to the associate **accredited-funded private school**. Form No. 2 is available from the associate **accredited-funded private school** or from Alberta Education's Home Education Information Package at: <http://www.education.gov.ab.ca/educationsystem/homeedinfo.pdf>.
2. Home Education funding is based on:
- a) student registration information in Grades 1 to 12 as of the **count date** that is reported to the Information Services Branch by October 5; and
- b) the application for reimbursement of ADL course costs for **home education students** in Grades 9 to 12 enrolled in courses at the ADLC (Form 06AE1.4a);
- 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 06AE1.4b).
- Revised**

3. Associate **accredited-funded private schools** shall have home education policies in place that indicate which Programs of Study and instructional materials will be considered for reimbursement and the amount of reimbursement for students in **blended programs**.
4. The associate **accredited-funded private school** must conduct at least two evaluations annually of their **home education students'** progress.
5. Home Education funding for an associate **accredited-funded private school** is the sum of a), b), and c) as follows:
  - a) the number of **home education students** in Gr. 1 - 12 on the **count date** multiplied by the Home Education funding rate; and
  - b) 50% of the eligible ADL course costs for **home education students** in Grades 7 to 12 enrolled at the ADLC, up to a maximum equivalent to the Home Education instruction funding rate; and
  - c) ADL course costs for **home education students** in Gr 1 - 6 taking a full load of ADL courses at the ADLC, which exceed the 50% Home Education funding that the associate **accredited-funded private school** provides to home education **parents** for the purchase of courses and instructional materials.

**Revised**

6. Funding for an associate **accredited-funded private school** for grades 1 to 9 students enrolled in a **blended program** on the **count date** is the sum of the calculations in (a),(b) and (c) :
  - a) the percentage of the student's home education program multiplied by the Home Education funding rate; and
  - b) the percentage of the student's **school** provided program multiplied by the Base Instruction funding rate for associate **accredited-funded private schools**; and
  - c) 50% of eligible ADL costs up to a maximum equivalent to the student's Home Education instruction funding amount.

**Revised**

7. Funding for an associate **accredited-funded private school** for grades 10 to 12 students enrolled in a **blended program** on the **count date** is the sum of the calculations in (a),(b) and (c) :
  - a) the percentage of the student's home education program multiplied by the Home Education funding rate; and
  - b) the percentage of the student's **school** provided program multiplied by the Base Instruction funding rate for associate **accredited-funded private schools**; and
  - c) 50% of eligible ADL costs up to a maximum equivalent to the student's Home Education instruction funding amount.

Example 1 -Blended Program for a student in grades 1-9:**Revised**

A student in a home education program for 40% of the time enrolled in courses at the ADLC and in a regular **school** program for 60% of the time would be funded as follows:

Home Education funding amount	40%	X	\$1,323	=	\$529.20
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Plus ADLC course costs up to a maximum of the pro-rated home education funding amount	40%	X	\$1,323	=	\$529.20
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Plus Base Instruction funding amount (for the applicable grade)	60%	X	\$3,175	=	<u>\$1,905.00</u>
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<b>Total</b>					<b><u>\$2,963.40</u></b>
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Example 2: Blended Program for a senior high student:

A senior high student in a home education program for 70% of the time and in a regular **school** program for 30% of the time would be funded as follows:

Home Education rate	70%	X	\$1,323	=	\$926.10
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Regular School rate (for applicable grade)	30%	X	\$3,175	=	<u>\$952.50</u>
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<b>Total</b>					<b><u>\$1,878.60</u></b>
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**REFERENCES**

Home Education Policy 1.1.2

Home Education Regulation AR 126/1999

## **PURPOSE**

This funding is provided to address the needs of students in Grades 1 and 2 who are experiencing difficulties in developing reading readiness and early literacy skills. This will provide **accredited-funded private schools** with additional human resources to enhance the early literacy skills of those students identified as at risk. This funding will also provide funding for early literacy resources and in-service for teachers, other staff, and volunteers deployed as part of the **accredited-funded private school's** early literacy program.

## **CONDITIONS**

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 annual operational plan, submitted by May 31 of the previous school year, that it plans to provide Early Literacy programs for Grades 1 and 2.
3. Funding will be based on the current school year enrollments in Grades 1 and 2.
4. **Accredited-funded private schools** must use at least 85% of the funding to hire additional human resources to support classroom teachers in giving students at risk the special help and attention they need. The remaining funding, up to a maximum of 15%, may be used to purchase early literacy resources, or to provide in-service for **parents** and for teachers, or other staff deployed as part of the **school's** Early Literacy program.

## **REQUIREMENTS**

1. An **accredited-funded private school** that receives Early Literacy funding must provide the program and ensure that there is flexibility in delivery of the program so that all Grades 1 and 2 students in an **accredited-funded private school** who need early literacy assistance have access to the program.
2. An **accredited-funded private school** that receives Early Literacy funding must employ additional human resources and may do so under employment conditions that the **accredited-funded private school** deems most appropriate.

3. **Accredited-funded private schools** must keep a record of this funding. The funding should be used to hire Early Literacy related classroom support and to purchase Early Literacy resources. If the **private school's** program objectives have been met and not all the funding was utilized, the remainder of the funding may be utilized for other programs.
4. **Accredited-funded private schools** will be required to report on the number of students served and their level of achievement. **Accredited-funded private schools** will be required to report revenues and expenditures in their audited financial statements.



## **PURPOSE**

This funding enables **accredited-funded private schools** to provide appropriate resources for daily physical activity programs in eligible Grades 1-9 **schools**.

## **CONDITIONS**

1. Daily Physical Activity (DPA) funding is provided to **accredited-funded private schools** based on schools that offer at least one grade in Grades 1-9.
2. Outreach schools, on-line schools, schools solely serving home education students, and Hutterite colony schools are not eligible for this funding.

## **REQUIREMENTS**

1. School information for funded students enrolled as of the **count date** must be submitted to the Information Services Branch by October 5.
2. **Accredited-funded private schools** are not required to apply for funding under this section. The School Finance Branch will determine the funding allocation for each **accredited-funded private school**.

## **PURPOSE**

This funding for **French First Language (Francophone) Education** is provided by the Federal Government and is distributed to **francophone regional authorities** by Alberta Education. This funding is supplemental to the funding provided by Alberta Education to **francophone regional authorities**.

## **CONDITIONS**

1. 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 **French First Language (Francophone) Education** for **funded students** in Grades 1 to 12 and **funded children** in **ECS programs**.
2. **Francophone regional authorities** may also include as **funded students** under this section:
  - a) a **funded student** they have directed to attend College Mathieu in Gravelbourg, Saskatchewan; or
  - b) a student who attends another **school jurisdiction** with which the **francophone regional authority** has entered into an **educational services agreement** as per Section 62 of the *School Act*. When registering these students, the providing **school authority** must register the students using the grants code 145, and enter the authority code for the directing **francophone regional authority** in the “**Resident Board**” field. The **francophone regional authority** does not register the students.
  - c) 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.

## **REQUIREMENTS**

1. **Francophone regional authorities** must ensure all **funded students** receiving a **French First Language (Francophone) Education** are coded using code 221.

## CONSIDERATIONS

1. This funding for **francophone regional authorities** is based on **funded student** enrollments as of the **count date** (reported to the Information Services by October 5) and the hours of French instruction for the school year (including both semesters for Grades 10 to 12) for the reported students. The funding amount is calculated by multiplying the number of eligible FTE students by the per **funded student** rate provided in Consideration #4.

A FTE **funded student** means a **funded student** or **funded child** who:

- receives 712 hours of instruction in French per year in ECS to Grade 6 (75% of 950 hours of instruction per year); or
- receives 570 hours of instruction in French per year in Grades 7 to 9 (60% of 950 hours of instruction per year); or
- receives 600 hours of instruction in French per year in Grades 10 to 12 (60% of 1000 hours of instruction per year).

2. **Francophone regional authorities** must provide the following minimum average number of student instructional hours in French per year:

ECS	238 hours per <b>funded child</b> /year
Grades 1 to 6	475 hours per student/year
Grades 7 to 9	380 hours per student/year
** Grades 10 to 12	(10 credits) 250 hours per student/year

- \*\* The 250-hour minimum refers to students who take one 5-credit Français course and the other 5-credit course taught in French such as social studies or mathematics in one year.

3. **Funded students** and **funded children** receiving a **French First Language (Francophone) Education** that have less than the minimum average hours of instruction in French specified in Consideration #2, will be funded as follows:

ECS to Grade 9

Funding Rate per FTE <b>Funded Student</b>	<b>X</b>	Instructional hours per year  950 Hours	<b>X</b>	Number of <b>Funded Students/ECS Children</b> in the program
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Grades 10 to 12

Funding Rate per FTE <b>Funded Student</b>	<b>X</b>	Instructional hours per year  1000 Hours	<b>X</b>	Number of <b>Funded Students</b> in the program
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4. The following grant rates for 2005-2006 are provided as estimates for planning purposes only. Final grant rates will be confirmed once all enrollments for 2005-2006 are compiled.

<b>PROGRAM</b>	<b>RATE</b>
French First Language (Francophone) Education ECS to Gr. 6	\$105 per FTE
French First Language (Francophone) Education Gr. 7 to 12	\$180 per FTE

## **PURPOSE**

This funding for French Language programs and/or courses is provided by the Federal Government and is distributed to **school authorities** by Alberta Education to assist students in learning French. This funding is supplemental to the funding provided by Alberta Education to all **school authorities**.

## **CONDITIONS**

1. Under an agreement between the Governments of Canada and Alberta, **school authorities** may receive federal funds for providing instruction in French for **funded students** in Grades 1 to 12 and **funded children** in **ECS programs**. The categories of instruction involving French which are funded as follows:
  - a) **Alternative French Language Programs** (French programs offered under Section 11(1) and 21(1)(a) of the *School Act*, including French Immersion); and
  - b) **French as a Second Language (FSL)** courses (French programs offered under Section 11 and 39 of the *School Act*).
2. 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.

## **REQUIREMENTS**

1. **School authorities** must ensure that students in an **Alternative French Language Program** (such as French Immersion), which provides the minimum instructional hours in French outlined in Consideration #2, are coded using grants code 211.
2. **School authorities** must ensure that students taking **FSL courses**, or students in **Alternative French Language Programs** that do not meet the minimum instructional hours in French as outlined in Consideration #2, are coded using grants code 230.
3. 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.

4. 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**.

## CONSIDERATIONS

1. Federal French Language funding is based on French program student enrollments as of the **count date** (reported to the Information Services Branch by October 5) and the hours of French instruction for the school year (including both semesters for Grades 10 to 12) for the reported students. The funding amount is calculated by multiplying the number of eligible FTE students by the per FTE **funded student** rate provided in Consideration #5.

For **Alternative French Language Programs**, a FTE **funded student** means a **funded student** or **funded child** who:

- receives 712 hours of instruction in French per year in ECS to Grade 6 (75% of 950 hours of instruction per year);
- receives 570 hours of instruction in French per year in Grades 7 to 9 (60% of 950 hours of instruction per year);
- receives 600 hours of instruction in French per year in Grades 10 to 12 (60% of 1000 hours of instruction per year).

2. To receive funding under **Alternative French Language Programs** such as French Immersion (code 211), a **school authority** shall provide the following minimum number of student instructional hours in French per year:

### Revised

ECS	238 hours per child/year
Grades 1 to 6	475 hours per student/year
Grades 7 to 9	380 hours per student/year
** Grades 10 to 12	(10 credits) 250 hours per student/year

- \*\* The 250-hour minimum refers to students who take one 5-credit French language arts course and one other 5-credit course taught in French such as social studies or mathematics in one year.

- Revised** 3. **Funded students** and **funded children** enrolled in an **Alternative French Language Program** with less than the hours of instruction in French specified in Consideration #1, and with at least the minimum hours of instruction in French specified in Consideration #2, will be funded according to the following formula:

ECS for Grade 9

Funding Rate per FTE <b>Funded Student</b>	<b>X</b>	$\frac{\text{Instructional hours per year}}{950 \text{ hours}}$	<b>X</b>	Number of <b>Funded Students/Funded Children</b> in the program
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Grades 10 to 12

Funding Rate per FTE <b>Funded Student</b>	<b>X</b>	$\frac{\text{Instructional hours per year}}{1000 \text{ hours}}$	<b>X</b>	Number of <b>Funded Students</b> in the program
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If a student in an Alternative French Language Program receives less than the minimum hours of instruction in French specified in Consideration #2, the student will be funded according to the formula for FSL (see Consideration #5).

4. **FSL courses** (code 230) should fall within the following range of student instructional hours in French per year:

ECS	Less than 238 hours per student/year
Grades 1 to 6	Less than 475 hours per student/year
Grades 7 to 9	Less than 380 hours per student/year
* Grades 10 to 12	125 to 250 hours per student/year

- \* **Schools** will indicate 250 hours for students who take two 5-credit **FSL courses** in one year.

## SECTION 4.2 FEDERAL FRENCH LANGUAGE FUNDING

5. **Funded students** and **funded children** enrolled in a **FSL** course, will be funded according to the following formula:

### ECS to Grade 9

Funding Rate per FTE <b>Funded Student</b>	<b>X</b>	Instructional hours per year	<b>X</b>	Number of <b>Funded Students/Funded Children</b> in the program
		950 Hours		

### Grades 10 to 12

Funding Rate per FTE <b>Funded Student</b>	<b>X</b>	Instructional hours per year	<b>X</b>	Number of <b>Funded Students</b> in the program
		1000 Hours		

6. The following grant rates for 2006-2007 are provided as estimates for planning purposes only. Final grant rates will be confirmed once all enrollments for 2006-2007 are compiled.

PROGRAM	RATE
Alternative French Language Program ECS to Grade 6	\$105 per FTE
Alternative French Language Program Grade 7 to 12	\$180 per FTE
FSL courses ECS to Grade 6/other courses*	\$65 per FTE
FSL courses Grade 7 to 12/other courses*	\$90 per FTE

- \* This funding rate also applies for students and children taking courses in an **Alternative French Language Program** who receive less than the minimum number of instructional hours in French per year as per Consideration # 2.

## REFERENCES

Policy, Regulations and Forms Manual

French as a Second Language and French Immersion Policy 1.5.2



## **PURPOSE**

This inter-ministerial funding is provided to Student Health Partnerships to improve access to and enhance the provision of integrated health and related support services for **school** children with special health needs so that they can be successful in their school programs. This targeted funding must be used for the initiative for which it was provided.

## **CONDITIONS**

1. Students with special health needs include students with physical disabilities, development disabilities, neurological disorders, sensory impairments, medical conditions, and/or emotional/behavioural disabilities who are registered in **school** programs from **Early Childhood Services (ECS)** through Grade 12. Services eligible for funding include speech-language therapy, physical therapy, occupational therapy, audiology, respiratory therapy, clinical nursing, and emotional/behavioural supports.
2. Student Health Initiative (SHI) funding is accessed by Student Health Partnerships consisting of **school authorities**, Regional Health Authorities, and Child and Family Services Authorities, which collectively set priorities, develop collaborative strategies for delivering services and share accountability for results.
3. Alberta Education administers SHI funding on behalf of the following provincial government partners – Alberta Education, Alberta Health and Wellness, and Alberta Children's Services.
4. SHI funding must be pooled and shared by the Student Health Partnership to provide students with identified special health needs with access to student health services. Students throughout the region must have equitable access to services regardless of their **school** program.
5. The SHI funding allocation may only be accessed if, and when, the **school authority** joins a Student Health Partnership, and a Service Plan is submitted that is signed by the Chair of the Partnership on behalf of all the required partners. The Partnership must include the regional health authority, the child and family services authority and at least one **school board**.
6. Decisions on how the SHI funding is to be utilized must be made jointly by the partners in the Student Health Partnership.
7. Alberta Education distributes SHI funding for Student Health Partnerships through the "banker" **school board** designated by the Partnership to administer the Student Health Initiative funds on behalf of all partners.

## REQUIREMENTS

1. Every school year, Student Health Partnerships must submit a Service Plan for approval. The service plan for the 2006-2007 school year with all required documents must be submitted by May 15, 2006.
2. Student Health Partnerships must submit an Annual Report for the previous school year, with all required components and documents, by November 30 of the current school year.
3. Student Health Partnerships must designate a **school board** as a “banker” through which they will receive and distribute their funding. Student Health Partnerships are required to identify in their annual service plan who they have designated as their “banker” **school board** and of any changes to this designation.

## CONSIDERATIONS

1. The allocation of the SHI funding to the Partnership is based on a funding distribution formula that estimates the number of students within the participating **school authorities** who require student health services by combining the numbers of **students with disabilities** with a portion of the general student population who may require student health services, and that addresses the factors of **distance** and socio-economic status on the region.

Base Funding: 30% of the provincial funding provides a base level of funding to each Partnership based on its proportion of the total provincial ECS to Grade 12 **funded child/student** enrollment, based on Alberta Education total **funded child/student** enrollment data.

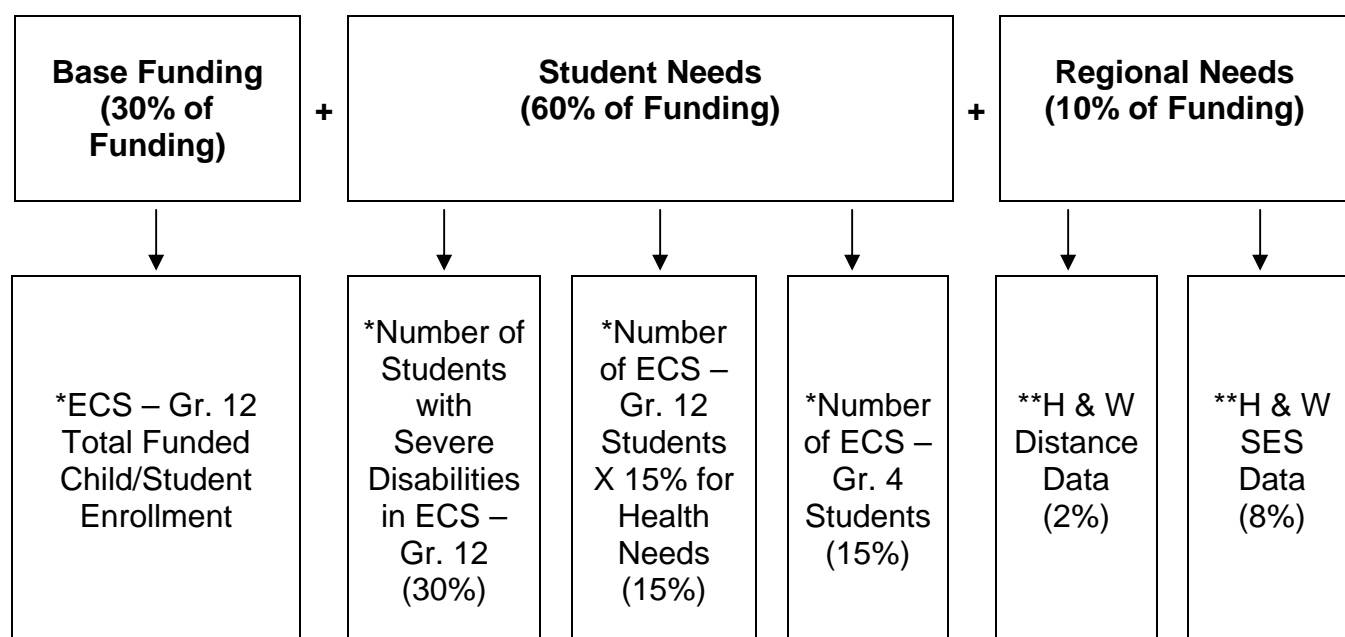
Student Need: 60% of the provincial funding provides additional funding to each Partnership based on:

- 30% towards each Partnership's proportion of the total provincial number of ECS to Grade 12 **students with severe disabilities**. Alberta Education maintains **school jurisdiction** profiles (Grades 1 to 12) that include data on **students with severe disabilities**.
- 15% toward each Partnership's total student population who potentially require student health services (15%) based on Alberta Education ECS to Grade 12 student enrollment data.
- 15% toward each Partnership's proportion of the total provincial number of students in Early Childhood Services to Grade 4 to give emphasis to early intervention, based on Alberta Education data on student enrollment by grade.

Regional Need: 10% of the provincial funding provides additional funding to each Partnership based on:

- 2% of the total provincial funding allocation distributed towards each Partnership's distance needs based on a formula that considers children's **distance** from services. (Data provided by Alberta Health and Wellness.)
- 8% of the total provincial funding allocation distributed towards each Partnerships' socio-economic needs based on a formula that considers the socio-economic factors of children in the region. (Data provided by Alberta Health and Wellness.)

### STUDENT HEALTH INITIATIVE FORMULA



\*Alberta Education data as of the **count date**; based on data for ages 2 ½ to 20 years of age.

\*\*Alberta Health and Wellness data as of March 31<sup>st</sup>; based on data for ages 5 to 19 years of age.

The total for the Partnerships is the sum of the Partnership's proportion of the provincial allocations towards each of: base funding, **students with severe disabilities**, students who potentially require student health services, students in ECS to Grade 4 distance factors and socio-economic factors. This sum is the SHI allocation provided to the Partnership of which the **school authorities** are partners.

Commencing with the 2004-2005 Service Plan year, the above model was implemented. The partners in the Student Health Partnership will continue to decide how the pooled funding will be shared and utilized based on identified student health needs and priorities.

2. **Funded students** who are registered with **school authorities** in alternative programs such as home education/**blended**, **outreach** and **online** are counted in the SHI funding allocation through the **school authority** where they are registered. The SHI funds are provided to the SHI Partnership to which that authority belongs. Each Student Health Partnership is responsible for the student health needs of any student registered with its **school authority** partners who live in another region of Alberta.
3. Funding for administration costs is included in the allocation.

Requirements are outlined in the Student Health Partnership Service Plan Guidelines for 2006/2007 and the Student Health Partnership Annual Report Guidelines for 2005/2006 (available at <[www.gov.ab.ca/studenthealth](http://www.gov.ab.ca/studenthealth)>).

## **PURPOSE**

This funding is provided to **school authorities**, in addition to Base Instruction funding, for specific local initiatives to improve student learning and performance. This targeted funding must be used for the initiative for which it was provided.

## **CONDITIONS**

- Revised**
1. Funding is provided for projects that have been approved by Alberta Education.
  2. The amount in Condition #1 is subject to a maximum funding level, which is calculated by multiplying the applicable rate per student/child by the student count on the **count date** of the previous school year for registered students in Grades 1 to 12 and registered ECS children.
- Revised**
- Alberta Education will approve multi-year projects up to a maximum of three years. Funding for future years will be based upon demonstrated evidence of success as collaboratively decided by Alberta Education and the **school authority**. If funding is not continued for a project, the **school authority** may submit a new project proposal to Alberta Education for the same or a lesser amount of funding.
3. Heritage Language Schools are not eligible for funding under this section.

## **REQUIREMENTS**

1. **School authorities** develop **school** improvement project proposals based on identified student needs, which reflect unique local needs and circumstances. A project proposal must be submitted to the School Improvement Branch for approval using the project application form found on the Alberta Education Extranet.
2. **School authorities** have a high degree of autonomy and flexibility in designing **school** improvement projects and in allocating funding. The following conditions must be met for project approval:
  - a) the project plan must provide for sufficient professional development and administrative support;
  - b) funding may not be used for payment of bonuses or other types of incentives; and
  - c) funding may not be allocated on a per-student basis to **schools**.

- Revised
3. **School authorities** must provide Alberta Initiative for School Improvement (AISI) reporting information according to the following timelines:
    - **October 15** – AISI Project Annual Report (APAR); AISI Project Final Report (APFR) in the final year of the project.
    - **November 30** – Annual Education Results Report includes a link on the jurisdiction Web site to the AISI Project Annual Report (APAR) as part of the Highlights for the previous school year.
  4. Unexpended AISI funds at the end of the AISI project may be transferred to another AISI project, whether existing or new.

## CONSIDERATIONS

1. Funding for projects approved prior to September 1 will commence in September of the school year and will be based on the same payment schedule as Base Instruction payments.
2. Funding for projects approved after September 1 will commence in the month following approval and may include “retroactive” funding, if that was part of the project approval.
3. **School authorities** may transfer funding among their project budgets as long as they remain within their total approved allocation.

## REFERENCES

Framework for the Alberta Initiative for School Improvement, 1999

Alberta Initiative for School Improvement Administration Handbook

Alberta Initiative for School Improvement website at [www.education.gov.ab.ca/sib/aisi](http://www.education.gov.ab.ca/sib/aisi)

## **PURPOSE**

**Revised** This funding provides support for basic SuperNet Service high-speed network connectivity for **school authorities**. This targeted funding must be used for the initiative for which it was provided.

## **CONDITIONS**

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

## **REQUIREMENTS**

- Revised**
1. **School authorities** must sign a Letter of Agreement with Axia SuperNet Ltd. for all SuperNet connected sites.
- Revised**
2. **School authorities** must apply for SuperNet Service funding by submitting a SuperNet Service funding application (Form 06AE5.3) to Alberta Education's Stakeholder Technologies Branch (STB) along with a copy of each Letter of Agreement, Schedule B and Attachment to Schedule B as soon as possible after the sites are connected to SuperNet services.
  3. **School authorities** must provide notification to STB of any proposed changes, including additions and/or deletions to the list of connected sites and the connection or disconnection dates for each site.

## **CONSIDERATIONS**

1. 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.
2. SuperNet Service funding for **school jurisdictions** is provided for 100% of the monthly service cost to a maximum of \$503.50 per month for each approved site. **Accredited-funded private schools** will be funded for 60% of the monthly service cost to a maximum of \$302.10 for each approved site. **Private ECS operators** will be funded for 50% of the monthly service cost to a maximum of \$251.75 for each approved site. If the connection date is other than the 1<sup>st</sup> of the month, the payment for that month will be pro-rated according to the connection date.

## 3. ELIGIBLE SITES:

- a) Eligible sites include **school authority** central offices, **schools**, and network operation centres.
  - b) The Stakeholder Technologies Branch (STB) of Alberta Education will consider special circumstances for inclusion as an eligible site on a case-by-case basis. The STB may be contacted for more information.
- Revised**

**ADDITIONAL INFORMATION**

## 1. NETWORK HEAD-END AGGREGATION PROVISION

The aggregation of many SuperNet-connected **schools** back to a single network “head-end” location in larger ECS – Grade 12 **school jurisdictions** will create a significant bottleneck for network traffic.

**Revised** As a result, Alberta Education will provide additional SuperNet Service funding to a **school jurisdiction** network head-end location based on the following formula: Head End SuperNet Service Funding = \$503.50 x jurisdiction student population/average number of students per public jurisdiction (based on provincial student population counts at the end of each school year).

## 2. 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 STB that is valid for one year. They must continue to provide a new, signed document for each subsequent year.
- 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.



### 3. EXISTING HIGH-SPEED NETWORKING INFRASTRUCTURE PROVISION

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

- a) This addendum applies to sites with qualifying network infrastructure installed prior to the initial SuperNet rollout only.
- b) At least one site on the **school authority** owned network infrastructure must connect to SuperNet using an Axia SuperNet Ltd. contracted service.
- c) 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.
- d) 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).

**PURPOSE**

This targeted provincial funding enables **school jurisdictions** to hire and retain new teachers in order to lower class size averages across jurisdictions to those recommended by Alberta's Commission on Learning (ACOL).

**CONDITIONS**

- New** 1. **School jurisdictions** will receive a 3% increase to their 2005-2006 class size funding allocation to retain the teachers hired in the first two years of the initiative.
- New** 2. Based on the 2005-2006 class size survey data reported by **school jurisdictions**, additional funding will be provided to hire new teachers to reach the ACOL class size guidelines in the 2006-2007 school year.
- Revised** 3. Total teacher costs of \$78,000 were used to determine the additional funding allocations for the 2006-2007 school year.

**REQUIREMENTS**

- 1. For those jurisdictions that have already met the ACOL guidelines or are unable to hire teachers due to factors beyond their control, these funds can be used, with the prior approval of the **Minister**, for classroom/student supports. Under no circumstances can this funding be used to increase salary/benefit levels of jurisdiction staff, other than a provision for grid movement.
- Revised** 2. Some jurisdictions are already at, or below, some or all of the ACOL guidelines; however, the goal is for every jurisdiction across the province to reach the ACOL guidelines in all grade categories on a jurisdiction basis. School jurisdictions that are below the ACOL guidelines in any grade category, have the flexibility to adjust their averages; however, these averages should not exceed the ACOL guidelines.
- 3. The Commission recognizes that some classes will be above and some below the guidelines due to individual circumstances. Not every classroom will reflect the ACOL guidelines, as the class size averages are calculated on a jurisdiction basis at the jurisdiction level.
- Revised** 4. **School jurisdictions** are required to post **jurisdiction** and **school** class size averages on their Web site by January 15 of each school year by grade category (K-3, 4-6, 7-9, 10-12).

## **PURPOSE**

This inter-ministerial funding is provided to:

- support the creation and operation of a regional integrated case management system to better coordinate the diverse range of programs and services required by children and youth with complex needs as identified in the *Policy Framework*.
- provide specialized services for children and youth with complex needs who require significant extraordinary care due to the severity of their impairment(s) so that they can attain their potential, participate fully in their education programs and be successful at learning.

## **CONDITIONS**

1. This funding is provided to Regional Integrated Case Management Teams, who then determine on an individual case-by-case basis the amount of funding to be provided for each eligible child or youth. The following terms must be met for the Team to consider providing funding:
  - a) The child or youth:
    - is less than 20 years of age as of September 1 (there is no minimum age), and
    - has one or more disabling conditions that severely impairs his/her ability to participate in daily activities at home, in **school** and in the community, and
    - requires extraordinary care and services from more than one ministry or service sector, and
    - requires a high degree of service coordination because of the complexity of the variety and intensity of services required.
  - b) The local programs and services:
    - cannot provide the extraordinary combination and level of services the child requires, or
    - do not have sufficient resources to provide the combination and level of services the child requires, or
    - are prevented by mandate/policy from providing the combination and level of services the child requires.

**Revised**

- c) The local case managers, service providers and family/guardian:
- have met to develop an integrated service plan, and
  - have determined that all local resources have been exhausted, and
  - have determined that an adequate service plan cannot be developed locally, and
  - have determined that without an adequate service plan the child, youth, family or public will be at risk, and
  - agree that the child/youth should be referred for a Regional Integrated Case Management Team Review, and
  - have determined that the child/youth has a guardian who is willing to participate in a review and in the development of an adequate integrated service plan.
2. Children and Youth with Complex Needs funding is accessed by Regional Integrated Case Management Teams consisting of **school authorities**, regional health authorities, child and family services authorities, **parents** and other partners. The Team must collaboratively provide integrated case management for the child or youth with complex needs and they must develop integrated service plans and share accountability for results.
3. The Children and Youth with Complex Needs funding allocation may only be accessed if, and when, the **school authority**, regional health authority and child and family services authority join a Regional Integrated Case Management Team, and a Terms of Reference has been submitted , approved at the provincial level and signed by all the required partners of the Regional Integrated Case Management Team. The Terms of Reference must include roles and responsibilities for decisions regarding the use of the funding. (See Requirement 2.) The Terms of Re
4. fference must updated annually and submitted for approval to the Provincial coordinator by May 15, 2006.
5. Decisions on how the Children and Youth with Complex Needs funding is to be utilized must be made jointly by the partners of the Regional Integrated Case Management Team. Children and Youth with Complex needs funding must be pooled and shared by the Regional Integrated Case Management Team for operation and service delivery to provide children and youth with access to services. Children and youth with complex needs throughout the region must have equitable access to services.
6. Alberta Education administers Children and Youth with Complex Needs funding on behalf of the following provincial government partners - Alberta Education, Alberta Children's Services, and Alberta Health and Wellness, including the Alberta Mental Health Board.
7. Alberta Education distributes Children and Youth with Complex Needs funding for Regional Integrated Case Management Teams through the "banker" school authority.

## **REQUIREMENTS**

1. All other sources of funding for service delivery must be exhausted prior to accessing the Children and Youth with Complex Needs funding.
2. Regional Integrated Case Management Teams must submit, for approval, a Terms of Reference for the school year with all required documents, by May 15 of the previous school year.
3. Regional Integrated Case Management Teams must submit an Annual Report for the previous school year, with all required documents, by November 30 of the next school year.
4. Regional Integrated Case Management Teams must designate a **school authority** as a "banker" through which they will receive and distribute their funding. Regional Integrated Case Management Teams are required to identify in their Terms of Reference who they have designated as their "banker" school authority and any changes to this designation.

## **CONSIDERATIONS**

1. Funding for Children and Youth with Complex Needs is comprised of two components:
  - a) Operational Funding  
Each Regional Integrated Case Management Team receives a base amount (\$70,000) of funding for implementation of the team including a regional support coordinator.
  - b) Service Delivery Funding  
Service delivery funding is provided to each of the Regional Integrated Case Management Teams based on the region's portion of the total provincial service delivery funding.

The allocation of the service delivery funding for each Regional Integrated Case Management Team is based on the region's average percentage. This average percentage is the calculated average of the three percentages outlined below:

- The region's percentage of the total provincial population of children and youth age 0 to 19. Data is provided by Health and Wellness.
- The region's percentage of the total provincial number of Early Childhood Services to Grade 12 **students with severe disabilities** enrolled in school programs. Data is provided by Alberta Education.
- The region's percentage of the total provincial number of children and youth receiving services under Resources for Children with Disabilities. Data is provided by Children's Services.

The region's average percentage is then multiplied by the total provincial service delivery funding to determine the Children and Youth with Complex Needs funding allocation that will be provided to the Regional Integrated Case Management Team.

2. Annual reviews of the allocated funding will be conducted to review what regions have spent and to look at equity across regions. Allocations will be confirmed and adjusted in the subsequent year if necessary.

## **REFERENCES**

*Policy Framework for Services for Children and Youth with Complex Needs and Their Families (July 2003)*

*Management of Integrated Services for Children and Youth with Complex Needs and Their Families: Guidelines for Alberta Regional Teams.* (Available at [www.child.gov.ab.ca](http://www.child.gov.ab.ca))

## **PURPOSE**

This funding provides for education programs for **resident students of the government** placed in **institutions** such as hospitals, young offender centres, treatment centres, youth assessment centres and **group homes**.

## **CONDITIONS**

### **INSTITUTIONAL PROGRAMS**

1. **School jurisdictions** and **accredited-funded private schools** authorized to provide an education program in an **institution** operated or approved by the Government of Alberta may qualify for institutional program funding. Funding is provided for educational programs for **resident students of the government** who reside in an **institution** or a **group home** approved by the **Minister** of Education. Eligible **resident students of the government** are those who:

- a) are in custody under the *Corrections Act*, the *Corrections and Conditional Release Act* (Canada), the *Youth Criminal Justice Act* (Canada) or the *Youth Justice Act*, or

**Revised**      b) are **in the custody of a director** pursuant to the *Child, Youth and Family Enhancement Act*, or have a guardian appointed under the *Child, Youth and Family Enhancement Act*, or

- c) are in long term medical care; or

- d) are a temporary resident of a women's shelter and require protection from physical, psychological or sexual abuse (for funding purposes under this section, these students are considered **resident students of the government**).

These **resident students of the government** have been placed in the **institution** because they require care and protection, or they pose a danger to themselves or others, or they require extensive treatment and therapy.

2. **School jurisdictions** and **accredited-funded private schools** must have approval from the **Minister** and a contract/agreement with Alberta Education to provide an educational program to students in the **institution**. Application for program approval should be submitted to the Director of the Special Programs Branch of Alberta Education.

3. Institutional funding will only be provided for **eligible resident students of the government** who:
  - a) reside in the **institution**; and
  - b) must receive their education program in the **institution** because they are not able to attend a local community **school** or the local community **school** cannot provide an appropriate program.

Alberta Education will not provide funding to cover the education program costs for non-eligible students attending institutional programs as outlined above (e.g., students who do not reside in the **institution** and/or who are not **resident students of the government**). These would include day students, students placed by the **school authority** providing the institutional program, tuition students from another **school jurisdiction**, or tuition students from out-of-province.

4. **Students with severe disabilities** who reside in an **institution** will be funded through Institutional Program funding and are not eligible for Severe Disabilities funding.
5. Only **group homes** with treatment program/facilities are eligible for funding under this category.
6. Institutional programs will only be funded for a 10-month/regular school year program. Only Young Offender Centre's will be funded for a 12-month program.

## **REQUIREMENTS**

### **INSTITUTIONAL PROGRAMS**

**School jurisdictions** and **accredited-funded private schools** with a contract or approval to provide an education program in an **institution** are required to:

1. Ensure all eligible institutional students are registered with the grants code 550.
2. Submit a budget of reasonable and eligible costs using Form 06AE6.1 to the Special Programs Branch by April 30 for the following school year. See Requirement #10 for further instructions.
3. Submit a letter for approval to the Special Programs Branch explaining the need for additional funds when requesting a significant change to an approved budget.
4. Submit a statement of actual program costs and revenues using Form 06AE6.1 to School Finance Branch by October 14 of the following school year. Funding will be based on the net actual cost of providing the program for costs approved on the budget. See Requirement #10 for further instructions. The Special Programs Branch may request explanation for cost categories where actual costs significantly exceed approved budget amount for that category.



5. Keep daily attendance records for all students.
6. Submit annually an Institutional School Profile Report form for the previous school year to the Special Programs Branch by October 14.
7. Ensure that the program provided in the **institution** is comparable quality to other **school** programs provided by the **school jurisdiction** or **accredited-funded private school**. The **institution's** educational program shall be considered an integral part of the **school jurisdiction** or **accredited-funded private school** and subject to the same level of planning, evaluating and reporting required by provincial and local policy.
8. Submit a written proposal for approval of new institutional programs. The proposal should provide a description of the program and a budget that outlines the financial needs to support delivery of the program. The proposal should be sent to the Director of the Special Programs Branch by May 1 of the school year preceding the school year for which approval is being requested.
9. Maintain the confidentiality of students in Women's Shelter programs by withholding the students' names and Alberta Student Numbers when submitting final costs for the programs. However, **school jurisdictions** and **accredited-funded private schools** should claim Base Instruction funding for these students and report this revenue on budget and final cost forms.
10. **Instructions for Completion of 2006-2007 Institutional Funding Applications**

Important: There are two categories of institutional programs – Regular and Mixed programs. Regular institutional programs only have eligible **resident students of the government** (e.g. students who were placed in the **institution** by a government agency and they reside in the **institution**). Programs of this type should complete the Regular Institutional Program form.

Mixed institutional programs have both eligible **resident students of the government** and non-eligible students. Non-eligible students are students who were not placed by a government agency and do not reside in the **institution** (e.g. day students, 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.

### **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**.

## Supplies and Services Costs

- a) Professional Development: staff training, conferences, and 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 such as reading, math, I.Q., fine motor/gross motor skills.

Note: Counseling, therapy or psychiatric services are not to be included in this category as these are the responsibility of the government 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 audio-visual equipment, copiers, staff computers, furniture, fixtures for the classroom or office are not to be included in this category as these costs are the responsibility of the government agency operating the **institution**.

## Technology Costs

Computers and computer upgrades, peripherals (printers for instructional use, peripherals for special needs students), 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, or
  - i) For regular institutional programs that have only institutional students, \$500 x the daily average number of students (line D of the budget form), or
  - ii) For mixed programs (e.g. programs with institutional students and non-institutional students), \$500 x the daily average number of institutional students (line E of the budget form), or
- b) Maximum of \$10,000 total per year. Requests over the maximum amount require prior approval from the Education Manager for **institutions** at the Special Programs Branch.

**Revenues:**

Please list the Base Instruction revenues you received (or plan to receive) for the eligible **resident students of the government** who were enrolled on the **count date** (note: these students should be coded with the 550 grants code in order to receive funding). List other funding you received for eligible **resident students of the government** in the program, but do not include the Institutional funding payments you received. For Mixed Institutional programs, please ensure that the revenues reported are only for eligible institutional students. Revenues for non-eligible 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 (e.g. if a student attends the program for 3 months, then the student would be counted for each of the 3 months attended.) For 2006-2007 Budgets, please use monthly enrollments from the 2005-2006 school year. For 2006-2007 Finals, please use monthly enrollments for the 2006-2007 school year.
- Step 2:      Add up the enrollments 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.

## **PURPOSE**

This funding is provided to designated **school jurisdictions** to provide **school authorities** with access to subsidized educational specialized services for children and students with special education needs.

## **CONDITIONS**

1. **School authorities** may access Regional Educational Consulting Services (RECS) for **funded students** and **funded children** assessed and identified by the **school authority** as meeting the criteria for one of the following Alberta Education special needs codes and requiring the support of a multidisciplinary educational support team:

Code 41 – Severe Cognitive Disability

Code 43 – Severe Multiple Disability

Code 44 – Severe Physical/Medical Disability

Code 45 – Deafness

Code 46 – Blindness

Code 55 – Hearing Disability

Code 56 – Visual Disability

RECS are not available for Early Childhood Services (ECS) children with a Severe Delay Involving Language (code 47).

2. Francophone **school authorities** may access “Le Réseau provincial d’adaptation scolaire” for **funded students** meeting the criteria for any special needs code/category.
3. Alberta Education will determine the funding allocation for each program based on provincial and regional needs.

## REQUIREMENTS

1. The **school jurisdiction** designated by Alberta Education to provide regional consulting services will use RECS to provide the following services to eligible students referred by **school authorities**.

- a) Consultation

Provide support to **schools** by teaming collaboratively to develop educational program recommendations, to make suggestions for curricular modifications, to recommend materials, to identify equipment needs, assistive technology, or environmental modifications and to model teaching strategies.

- b) In-Service

A wide range of in-service and staff development activities are available to teachers, paraprofessionals, administrators, professional colleagues and **parents**. Given the varied experience and expertise of the consultants, workshops may be tailored to the specific needs of the group.

- c) Assessment

This process includes identification of an individual's specific educational needs to assist **school** staff to design and implement effective programming for the student.

2. A rate of \$45 per hour will be charged for services provided to **school authorities** during the 2006-2007 school year. **School authorities** are responsible for prioritizing their need for regional consulting services.

Revised

3. The funding allocation is comprised of two components: The Base Operating funding is on-going permanent funding for which long-term decisions may be made. The Provincial Initiatives funding is not permanent and may be adjusted as provincial priorities change. No long-term decisions should be made for this funding component. **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 from Alberta Education for the next school year.

Revised

4. The **school jurisdictions** designated to provide Regional Educational Consulting Services will submit a budget (Form 06AE6.2) to the Special Programs Branch by June 30, indicating projected expenditures and revenues for the assessment consultation 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.

5. The designated **school jurisdictions** will provide, to the School Finance Branch, an audited financial statement that identifies the revenues and expenditures associated with the provision of services on or before November 30 of each year for the previous school year.
6. The designated **school jurisdictions** will provide an annual results report to the Special Programs Branch by November 30 for the previous school year.

## **CONSIDERATIONS**

1. Administration funding is included in the allocation.
2. The **school jurisdictions** designated by Alberta Education to provide regional assessment services are:
  - a) Grande Prairie School District #2357
  - b) Edmonton School District #7
  - c) Calgary School District #19
  - d) Greater North Central Francophone Education Region No. 2 (for **Francophone Regional Authorities** only) – Le Réseau provincial d'adaptation scolaire
3. 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: mkay@gppsd.ab.ca

### **ZONES 2, 3 and 4**

#### **Edmonton Regional Educational Consulting Services**

Edmonton School Public Schools  
Queen Elizabeth High School  
9425 - 132 Avenue  
Edmonton, Alberta  
T5E 0Y4  
Phone: (780) 472-4455  
Fax: (780) 478-7037  
E-mail: Judy.Miller@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**

206, 8627 – 91 Street

Edmonton, Alberta

T6C 3N1

Phone: (780) 487-3200

Fax: (780) 487-3434

E-mail: sgareaukubicki@csrcn.ab.ca

## **PURPOSE**

A purchasing credit to assist in purchasing learning resources at the Learning Resources Centre (LRC) is provided to **school jurisdictions**, accredited **private schools** and band operated and Federal Government administered First Nations **schools**.

## **CONDITIONS**

- Revised**
1. The Learning Resources Credit Allocation (LRCA) is used by **school jurisdictions** and accredited **private schools** to help pay for learning resources purchased from the LRC. The LRCA covers 25% of an order while the **school jurisdiction** or accredited **private school** pays for 75% of the order value when applied, until the LRCA is fully utilized.
  2. Unless requested otherwise by the **school jurisdiction** or accredited **private school**, the LRCA will be applied automatically against purchase orders until the full credit amount is used. **School jurisdictions** and accredited **private schools** that do not want a particular purchase order charged against the credit should clearly state, "DO NOT APPLY THE LEARNING RESOURCES CREDIT ALLOCATION" on the purchase order sent to LRC.
  3. The LRC will charge the regular selling price after the credit amount is fully utilized.

## **REQUIREMENTS**

1. A **school jurisdiction** or accredited **private school** is not required to apply for the LRCA; Alberta Education will determine the credit amount allocated on the school's account with the LRC using enrollment information in Grades 1 to 12 (who are under the age of 20) on the **count date** of the previous school year. To receive the credit, the **school jurisdiction** or the accredited **private school** must register their students with the Information Services Branch.



## CONSIDERATIONS

1. The 2006/2007 Learning Resources Credit Allocation is valid for April 1, 2006 to March 31, 2007.
2. If requested, LRC will assist **school jurisdictions** and accredited **private schools** in managing locally determined credit ceilings on an individual **school** basis.
3. **School jurisdictions** and accredited **private schools** may call the LRC or visit the LRC website at [www.lrc.learning.gov.ab.ca](http://www.lrc.learning.gov.ab.ca) to inquire about the status of their LRCA.
4. **School jurisdictions** and accredited **private schools** must show the amount of credit utilized as 'Provincial Revenue' and also as an expenditure on the Audited Financial Statements.

## **PURPOSE**

This funding is provided for the management of six regional professional development consortia that coordinate resources at the local, regional and provincial level to support the development of knowledge, skills, and attributes necessary for all people who have an influence on student education.

## **CONDITIONS**

1. The consortium and its agent **board** will operate under the provisions of the “Guidelines for Establishing Regional Consortia” and the recommendations of the Alberta Regional Professional Development Consortia 2003 Assessment Final Report.
2. Funding will be provided, to the six established regional professional development consortia approved by the **Minister**, for the management and “infrastructure” of the consortium.
3. Alberta Education will provide infrastructure funding to a consortium’s agent **board** at the specified rates.
4. Each consortium shall provide services on a cost-recovery basis.

## **REQUIREMENTS**

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 agent **board** will provide the consortium with completed Form 06AE6.4 which consists of 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 1. The consortia shall also

**Updated**

submit to the School Improvement Branch by December 1, an annual report that provides program details and results achieved.

5. Each consortium's Board of Directors shall complete plans to assist **schools** and **school jurisdictions** in the implementation of education programs through brokering and co-ordination of regional professional development, and development opportunities for the education community.

## CONSIDERATIONS

1. Alberta Education will provide infrastructure funding to a consortium through its agent as follows:

70% – September  
30% – April

The release of the scheduled April payment will be dependent upon the receipt of the prior school year's Statement of Revenues and Expenses.

2. The **Minister** and the agent **boards** may add to, delete, vary or amend the terms of the Guidelines by reciprocal correspondence and mutual agreement.

Revised<sup>3</sup>

## CONSORTIA NAMES

## AGENT BOARD

Updated

Southern Alberta Professional Development Consortium	Lethbridge School District No .51
Calgary Regional Consortium	Greater Southern Public Francophone Education Region No. 4
Central Alberta Regional Consortium	Red Deer School District No. 104
Edmonton Regional Learning Consortium	Parkland School Division No. 70
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

## REFERENCES

Guidelines for Establishing Regional Consortia: An Initiative for the improvement of Education and Its Delivery, Alberta Education, October 1995

Alberta Regional Professional Development Consortia 2003 Assessment Final Report

## **PURPOSE**

This funding repays the annual supported debt, principal and interest, which **school jurisdictions** owe on **school** facilities.

## **CONDITIONS**

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 or separate **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, Education and Housing Facilities Branch.
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.

- Interest shielding through payment for debenture interest on the unsupported portion of the principal is limited to compensation for interest rates up to 12% inclusive.

## CONSIDERATIONS

- 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.
- Interest shielding on unsupported debentures will be paid directly to the **school jurisdiction**.

<b>NEW</b>
------------

Effective April 1, 2006, responsibility and funding for this area transferred from Alberta Infrastructure and Transportation (AIT) to Alberta Education. AIT will continue to play a supportive role in providing technical advice on existing facilities and new construction and managing the overall construction process.

### **PURPOSE**

**New**

This funding, for **school jurisdictions**, is provided for the preservation of a current school facility or for the construction of a new school facility as approved by Alberta Education. This funding may only be used for the purpose for which it is intended.

### **CONDITIONS**

1. **School jurisdictions** may receive capital funding for projects approved by Alberta Education for new and replacement schools, for preservation of existing school facilities, and for the construction of modular classrooms and re-location of portables.

### **REQUIREMENTS**

1. School jurisdictions must submit their Three Year Capital Plan (2007-2010) and their Ten-Year Facility Plan by June 6, 2006. The Capital Plan should identify projects in order of priority in three categories:
  - a) New and replacement school facilities
  - b) Preservation and upgrading of existing school facilities
  - c) Modular classroom requirements and relocation of portables
2. The determination and allocation of this funding is currently under review. School jurisdictions will be informed of the funding details as they become available.
3. This funding cannot be used for any other purposes than that stated above.

**NEW**

Effective April 1, 2006, responsibility and funding for this area transferred from Alberta Infrastructure and Transportation (AIT) to Alberta Education. AIT will continue to play a supportive role in providing technical advice on existing facilities and new construction and managing the overall construction process.

**PURPOSE**

**New**

This funding, for **school jurisdictions**, is provided: to upgrade and/or replace building components that have failed or pose problems, in order to meet health and safety requirements; to extend the useful life of a school facility; and to maintain the quality of the school environment. This funding may only be used for the purpose for which it is intended.

**CONDITIONS**

1. **School jurisdictions** may use this funding to:
  - a) ensure school facilities meet all regulatory requirements, particularly as they relate to providing a safe and healthy learning environment.
  - b) preserve and improve the quality of the learning environment by:
    - i) prolonging the life of the school facility through planned, proactive replacement of major components that have exceeded their life cycle and are due for failure in the near future, or that have failed.
    - ii) upgrading of the educational areas to meet program requirements
  - c) meet the requirements of students with special needs
  - d) replace or upgrade building components to improve energy conservation and efficiency to achieve cost savings as a result.

**Updated**

2. The IMR funding formula is based on the following components:
  - 50% per student \*
  - 24% age of the building
  - 21% eligible school space
  - 3% geographic location (RCPA)
  - 2% other factors

\*The enrollment numbers used in the formula for IMR Funding are based on the 2005/2006 school year **Frozen Funded Student Count** as of May 31, 2006. **Funded ECS children** are counted as 0.50 FTE of a **funded student**. **Students with a Severe Disability** are counted as 3 FTE's, where the number of these students is based on the 2005-2006 severe disabilities profile for the **school jurisdiction**. **Children with a severe disability/delay** are counted as 1.5 FTE's. On-line students are counted as 0.10 FTE.

## **REQUIREMENTS**

- Updated** 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. Otherwise, IMR projects costing \$1 million or less, do not require ministerial approval.
- Updated** 2. Modernization projects in excess of \$250,000 will require ministerial approval.
- Updated** 3. All projects over \$100,000 must be tendered through a competitive bidding process as per the Agreement on Internal Trade.

## **CONSIDERATIONS**

- Updated** 1. See also the *School Infrastructure Manual*.



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**SCHOOL JURISDICTIONS**

**SECTION 8.1**

**SCHOOL JURISDICTION FUNDING RATES**

School Jurisdictions		2005-2006	2006-2007
<b>Base Funding</b>			
For 2006-2007, Base Instruction funding rates were increased by 4%. Transportation rates were increased by 5.7%. Severe Disabilities Profile numbers were increased by 4%. All other funding rates were increased by 2%.			
<b>ECS Base Instruction</b> (per funded child)		<b>\$2,544</b>	<b>\$2,645.50</b>
<b>Base Instruction Grades 1 – 12:</b>			
Grades 1 – 9 (per funded student)		<b>\$5,087</b>	<b>\$5,291</b>
Grades 10 – 12 (per CEU)		<b>\$145.34</b>	<b>\$151.17</b>
<b>Outreach Programs Base :</b>			
ted	Amount per approved Outreach program	<b>\$52,020</b>	<b>\$54,101</b>
<b>Knowledge and Employability Courses (K&amp;E ) -replaces IO:</b>			
ed	Grades 10 – 12 (CEU rate adjusted at 8/5's)	<b>n/a</b>	<b>\$241.87</b>
<b>Home Education</b> (per eligible funded student)		<b>\$1,272</b>	<b>\$1,323</b>
Plus 50% of the cost of ADLC courses for Gr. 7-12 to a maximum of:		<b>\$1,272</b>	<b>\$1,323</b>
Plus additional funding for Grades 1 –6 ADLC courses		<b>Per formula -see</b>	<b>Section 1.4</b>
<b>Additional Funding For Differential Cost Factors</b>			
<b>ECS Mild or Moderate Disability/Delay, Gifted and Talented</b> (per eligible funded child)		<b>\$2,197</b>	<b>\$2,241</b>
<b>ECS Program Unit</b>			
Maximum per eligible funded child		<b>\$22,141</b>	<b>\$22,584</b>
Maximum for each additional funded child in a unit		<b>\$5,493</b>	<b>\$5,603</b>
<b>Severe Disabilities</b> (per funded student based on severe profile) The Severe Disabilities Profile numbers were increased by 4% in 2006-2007.		<b>\$14,992</b>	<b>\$15,292</b>
<b>English as a Second Language</b> (per eligible FTE funded child/student)		<b>\$1,040</b>	<b>\$1,061</b>
<b>First Nations, Métis and Inuit Education</b> (per eligible FTE funded child/student)		<b>\$1,040</b>	<b>\$1,061</b>
<b>Socio-Economic Status</b> (per eligible FTE funded child/student)		<b>\$416</b>	<b>\$424</b>
<b>Small Schools by Necessity: Base Allocation</b>			
Schools with ≤ 150 FTE students		<b>\$78,030</b>	<b>\$79,591</b>
Schools with > 150 but < 226 FTE students		<b>sliding scale reducing to zero</b>	

School Jurisdictions			2005-2006	2006-2007
Additional Funding For Differential Cost Factors				
Small Schools by Necessity: Variable Allocation				
School Type	Peak Enrollment	Enrollment Limit		
K – 3	40	80	\$520	\$530
K – 6	80	150	\$1,457	\$1,486
K – 9	80	220	\$1,665	\$1,698
K – 12	80	290	\$2,601	\$2,653
Intra-Jurisdiction Distance (per km of eligible distance)			\$1.04	\$1.06
Enrollment Growth:				
Year-to-year growth:				
Growth rate > 4% (per FTE funded child/student)			\$563	\$574
Growth rate > 7% (per FTE funded child/student)			\$563	\$574
Enrollment Decline:				
Year-to-year decline:				
Decline rate > 1.5% (per FTE funded child/student)			\$3,797	\$3,873
Decline rate > 4% (per FTE funded child/student)			\$563	\$574
Small Board Administration				
Charter School (per school)			\$57,222	\$58,366
School jurisdiction enrollment < 2000 (per school jurisdiction)			\$416,160	\$424,483
School jurisdiction enrollment > 2000 but < 3000			sliding scale reducing to zero	
Northern Allowance				
Lower Zone (per FTE funded enrollment)			\$416	\$424
Intermediate Zone (per FTE funded enrollment)			\$624	\$636
Upper Zone (per FTE funded enrollment)			\$936	\$955
Relative Cost of Purchasing Goods and Services Adjustment (RCPA)				
(20% of total Education funding except Prov. Initiatives and Transportation)			per jurisdiction rate	
(47% of Transportation and Boarding funding from Education)			per jurisdiction rate	
Francisation (per eligible FTE funded child/student)			\$1,040	\$1,061
Stabilization			Allocation for 2005-2006	
(to ensure a school jurisdiction receives identical funding under new funding framework compared to the old framework)			plus 2% + any enrollment adjustment	
Enhanced ESL/Francisation and Support Services for Immigrant Students (per eligible FTE funded child/student)				
			\$364	\$371

School Jurisdictions Additional Funding For Differential Cost Factors	2005-2006	2006-2007
Hutterite Colony Schools (per colony school)	\$10,200	\$10,404
Daily Physical Activity (per eligible Grades 1-9 school)	\$1,000	\$1,020
Francophone Equivalency Access (per eligible funded student)	\$550	\$561
Targeted Funding for Provincial Priorities – Additional Funding		
Student Health Initiative	per formula	
Alberta Initiative for School Improvement (AISi) (Maximum per registered ECS child/student)	\$125	\$128
SuperNet Service Funding (max. per month per approved site)	\$503.50	\$503.50
Small Class Size Initiative Funding	per formula	
Children and Youth with Complex Needs	per formula	
Other Provincial Support Funding		
Institutional Programs	net cost of program for eligible students	
Regional Educational Consulting Services	as per approved allocation	
Learning Resources Credit (per registered student)	\$10.88	\$11.10
Regional Consortium (per consortium)	\$169,695	\$173,089
Transportation Funding		
Urban Transportation 5.7% increase		
10,000-19,999 population (per eligible passenger)	\$536	\$567
20,000-29,999 population (per eligible passenger)	\$497	\$525
30,000 + population (per eligible passenger)	\$458	\$484
Special (per eligible funded student with a disability)	\$2,436	\$2,575
ECS Special (per round trip/eligible transported child – max. of 185 trips)	\$13.17	\$13.92
Weekend (per eligible funded student)	\$3,967	\$4,193
Boarding (per eligible funded student)	\$3,565	\$3,768
Interschool Transportation Rates (per km for two-way distance between schools for eligible programs)	\$0.71	\$0.75

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**SCHOOL JURISDICTIONS**

**SECTION 8.1**

**SCHOOL JURISDICTION FUNDING RATES**

School Jurisdictions Transportation Funding	2005-2006	2006-2007
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**Metro Urban Transportation** 5.7% increase

Regular (per expected <b>eligible passenger</b> )	<b>\$458</b>	<b>\$484</b>
Special (per <b>funded student</b> based on severe profile)	<b>\$2,436</b>	<b>\$2,575</b>
ECS Special (per round trip/eligible transported child - max of 185 trips)	<b>\$13.17</b>	<b>\$13.92</b>

**Rural Transportation** 5.7% increase

Regular	<b>formula based using grid below</b>	
Special (per eligible <b>funded student with a disability</b> )	<b>\$4,873</b>	<b>\$5,151</b>
ECS Special (per round trip/eligible transported child –max of 185 trips)	<b>\$13.17</b>	<b>\$13.92</b>
Weekend (per eligible <b>funded student</b> )	<b>\$3,967</b>	<b>\$4,193</b>
Interschool Transportation Rates (per km for two-way <b>distance</b> between <b>schools</b> for eligible programs)	<b>\$0.71</b>	<b>\$0.75</b>
Boarding (per eligible <b>funded student</b> )	<b>\$3,565</b>	<b>\$3,768</b>

**Fuel Price Contingency**

per formula

Distance (Km)	2.4-5.9	6-9.9	10-13.9	14-17.9	18-25.9	26-37.9	38+
Rate	<b>\$9.35</b>	<b>\$13.69</b>	<b>\$16.37</b>	<b>\$18.83</b>	<b>\$22.65</b>	<b>\$23.92</b>	<b>\$25.16</b>

**Weighted Passengers**

**Density of Effective Transportation Service Area**

	0-.29	.30-.35	.36-.57	.58-.76	.77-.95	.96-1.14	1.15-1.30	1.31-1.59	1.60-3.01	3.02+
<b>0-700</b>	572	654	694	700	705	728	817	972	1,314	1,534
<b>701 -1400</b>	572	633	684	697	700	723	814	954	1,155	1,534
<b>1401 – 2100</b>	572	625	666	694	697	719	812	944	1,153	1,534
<b>2101 – 2800</b>	572	593	625	692	694	717	811	939	1,027	1,462
<b>2801 – 3500</b>	572	590	625	684	692	700	757	822		
<b>3501 – 4200</b>	572	583	593	682	684	700	750	778		
<b>4201 – 4900</b>	567	572	583	611	682	694	750			
<b>4901 – 5600</b>	567	567	574	583	583	666	679			
<b>5601 – 6300</b>	567	567	567	583	583	608				
<b>6301 +</b>	567	567	567	567	567					

**Plant Operations & Maintenance Funding**

2005-2006	2006-2007
Per formula	Per formula
Per formula	Per formula
Per formula	Per formula

<b>ECS Funding for Private ECS Operators and Private Schools with approved ECS Programs</b>	<b>2005-2006</b>	<b>2006-2007</b>
For the 2006-2007 school year, the Base Instruction funding rate was increased by 4%, the Transportation rates were increased by 5.7%, the Plant Operations and Maintenance rate increased by 5.8%, and all other funding rates were increased by 2%.		
<b>ECS Base Instruction Funding</b> (per funded child)	<b>\$2,544</b>	<b>\$2,645.50</b>
<b>Portable Classrooms for ECS Operators</b> (per month plus GST)	<b>\$100</b>	<b>\$100</b>
<b>Mild/Moderate, Gifted and Talented</b> (per eligible funded child)	<b>\$2,197</b>	<b>\$2,241</b>
<b>Program Unit Funding</b>		
Maximum per eligible child	<b>\$22,141</b>	<b>\$22,584</b>
Maximum for each additional child in a unit	<b>\$5,493</b>	<b>\$5,603</b>
<b>ECS Transportation – Regular</b> (per eligible transported child)	<b>\$458</b>	<b>\$484</b>
<b>ECS Transportation – Special Needs</b> (per round trip/eligible transported child - max of 185 trips)	<b>\$13.17</b>	<b>\$13.92</b>
<b>Plant Operation and Maintenance</b> (per funded child)	<b>\$237</b>	<b>\$251</b>
<b>Plus</b> (for every 25 funded children or portion thereof -based on 40 sq. m.)	<b>\$474</b>	<b>\$502</b>
<b>ECS Administration</b> (percentage based on enrollments of <2000 FTE funded children)	<b>6% of ECS funding per section 2.7</b>	
<b>Alberta Initiative for School Improvement (AISi)</b> (maximum per registered child)	<b>\$62.50</b>	<b>\$64.00</b>
<b>SuperNet Service Funding</b> (maximum per month per approved site)	<b>\$251.75</b>	<b>\$251.75</b>

**Private Schools Funding**

**2005-2006**

**2006-2007**

For the 2006-2007 school year, the Base Instruction funding rates were increased by 4%, and all other funding rates were increased by 2%.

**Base Instruction Funding**

Grades 1 – 9 (per **funded student**)

**\$3,052**

**\$3,175**

Grades 10 – 12 (per CEU - max of 60 CEU's/student per year)

**\$87.20**

**\$90.71**

**Designated Special Education Private Schools (DSEPS)**

Instruction 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).

**\$9,353**

**\$9,727**

Instruction 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 Base Instruction rate for **students with severe disabilities** in **DSEPS**.

**\$5,825**

**\$6,058**

**Knowledge and Employability (K&E) –replaces IO:**

**Updated**

Grades 10 – 12 (CEU rate adjusted at 8/5's)

**n/a**

**\$145.14**

**Severe Disabilities Funding** (per eligible **funded student**)

**\$14,992**

**\$15,292**

**Home Education** (per eligible **funded student**)

**\$1,272**

**\$1,323**

Plus 50% of the cost of ADL courses for Grades 7-12 to a maximum of:  
Plus additional funding for Grades 1-6 ADL courses

**\$1,272**

**\$1,323**

**Per formula –see Section 3.4**

**Early Literacy** (per **funded student** in Grades 1 and 2 on Sept 30)

**\$141**

**\$144**

**Learning Resources Credit** (per registered student)

**\$10.88**

**\$11.10**

**Institutional Programs**

**net cost of program for eligible students**

**Alberta Initiative for School Improvement (AISi)**  
(maximum per registered student)

**\$75**

**\$77**

**SuperNet Service Funding**  
(maximum per month per approved site)

**\$302.10**

**\$302.10**

**Daily Physical Activity** (per eligible Grades 1-9 **school**)

**\$600**

**\$612**

## **PART 1 – School Jurisdiction Funding**

**Sections 1.1 to 1.31, 5.2, 5.4, 6.1 and 6.2.**

**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 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 over-due 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 distributed on a monthly basis at 8.33% per month, with the exception of January and August - which will be at 8.35% and the month of March. An initial payment of 5% will be processed for March 9 and an additional payment will be made by March 31. If this additional payment does not equal 3.33%, then the difference will be either deducted/added to the April 16 payment, based on the prior approval of the Assistant Deputy Minister, Strategic Services.

### Payment Receipt Dates

Sept. 15, 2006	Jan. 15, 2007	Apr. 16, 2007	Aug. 15, 2007
Oct. 16, 2006	Feb. 15, 2007	May. 15, 2007	
Nov. 15, 2006	Mar. 9, 2007	Jun. 15, 2007	
Dec. 15, 2006	Mar. 30, 2007	Jul. 16, 2007	

Advances will be calculated using the most recent information on **funded children/students**, other statistics, and the current year rates.

Adjustments will be made in January for Grades 1 to 9 funding. For Grades 10 to 12, payments will be adjusted at the end of March and August, and if necessary, the following October for summer students.

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 4 – Federal French Funding**

##### **Sections 4.1 and 4.2**

On approval of allocations ⇔ 100%

#### **PART 5 – Provincial Priority Targeted Funding**

##### **Section 5.1 Student Health Initiative and Section 5.5 Children and Youth with Complex Needs**

On approval of joint plan ⇔ 58.33% advance

March/April ⇔ 100% less previous payment

##### **Section 5.3 SuperNet Service Funding**

September or upon approval of application ⇔ Prorated basis to March 31

April or upon approval of application ⇔ Prorated basis to August 31

#### **PART 6 Other Provincial Support**

##### **Section 6.4 Regional Consortium Funding**

September ⇔ 70%

\*April ⇔ 100% less previous payments

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

##### **Section 6.5 Debt Retirement**

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



**PART 2 – Early Childhood Services (ECS) Funding**

The funding provided by Alberta Education to **Private ECS operators** is released at set times provided all conditions have been met. The payment months are provided in this schedule to allow **private ECS operators** the opportunity to plan their cash flow to meet ongoing expenditures.

**Sections 2.1, 2.2, 2.6 to 2.7 and 5.2.**

The first payment for **private ECS operators** is processed after the “Notice of Intent to Operate” is received and is based on the enrollment estimate from that form.

All payments in January or later will be based on adjusted amounts using current year **count date** enrollment counts.

September	⇒ 40% advance*
January	⇒ 70% less previous payment**
April	⇒ 100% less previous payments

\*Any ECS program with 13 or more mild/moderate children in the prior school year will receive an advance of Mild or Moderate funding based on last year’s child enrollment.

\*\* All ECS programs with mild/moderate children will receive Mild or Moderate funding based on their current year **count date** enrollment count.

**Note:** With the approval of the Assistant Deputy Minister, Strategic Services, a March payment may be made up to 90% less previous payments.

Payments to **private ECS operators** will be received in the last week of the month (based on electronic deposit)

**Section 2.3 Program Unit Funding (PUF)**

September – <b>Designated Sp. Ed. ECS programs</b>	⇒ 40% advance based on the previous year approved PUF budget amount.
Upon approval of written request to School Finance – regular <b>ECS programs</b>	⇒ up to 40% advance based on the previous year approved PUF budget amount or current year estimated budget.
Upon receipt of PUF application	⇒ 70% less any previous amount
April	⇒ 80% less previous payments
June	⇒ 90% less previous payments
Upon approval of final costs	⇒ 100% less previous payments

**Note:** With the approval of the Assistant Deputy Minister, Strategic Services, a March payment may be made up to 90% less previous payment.

Payments to **private ECS operators** will be received in the last week of the month (based on electronic deposit)

**Sections 2.4 and 2.5 Transportation**

Payment is based on receipt and review of a transportation application

January	⇒ 70% advance
April	⇒ 100% less previous payments

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

On approval of allocations	⇒ 100%
----------------------------	--------

**PART 5 – Provincial Priority Targeted Funding****Section 5.3 SuperNet Service Funding**

September or upon approval of application	⇒ Prorated basis to March 31
April or upon approval of application	⇒ Prorated basis to August 31

### **PART 3 – Private Schools Funding**

The funding provided by Alberta Education to **accredited-funded private schools** is released at set times provided all conditions and requirements have been met. The payment months are provided in this schedule to allow **accredited-funded private schools** the opportunity to plan their cash flow to meet ongoing expenditures.

#### **Sections 3.1 (Grades 1 – 9), 3.2 to 3.6 and 5.2**

Advance payments will be made based on 2005/2006 enrollments and course information and 2006/2007 rates.

All payments in January or later will be based on 2006/2007 enrollments.

September	⇒ 40% advance based on last year's enrollment
January	⇒ 58.33% less previous payment
April	⇒ 100% less previous payments

**Note:** With the approval of the Assistant Deputy Minister, Strategic Services, a March payment may be made up to 90% less previous payments.

#### **Section 3.1 Base Instruction (Grades 10 – 12)**

September	⇒ 40% advance based on last year's CEUs
March	⇒ 58.33% less previous payment
August	⇒ 100% less previous payments

**Note:** With the approval of the Assistant Deputy Minister, Strategic Services, a March payment may be made up to 90% less previous payments.

### **PART 4 – Federal French Funding**

#### **Section 4.2 Federal French Language**

On approval of allocations	⇒ 100%
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### **PART 5 – Provincial Priority Funding**

#### **Section 5.4 SuperNet Service Funding**

September or upon approval of application	⇒ Prorated basis to March 31
April or upon approval of application	⇒ Prorated basis to August 31

**PART 6 – Other Provincial Support****Section 6.1 Institutional Programs and Resident Students of the Government**

September	⇒ 58.33% advance based on approved budget claim form
April	⇒ 90% less previous payments
On approval of Final Costs claim form	⇒ 100% of actual costs less previous payments

## **PURPOSE**

Enrollment counts are used to determine funding allocations for **school jurisdictions**, **accredited-funded private schools** and **private ECS operators** and are based on information obtained from Information Services Branch.

## **CONDITIONS**

1. All ECS children and all students in Grades 1 to 12 who are enrolled and attending a **school** on the **count date** of the school year will be counted at the **school** they are attending on that date. Enrollment records must be kept on file in the **school authority** or **school** that will substantiate the **count date** ECS child/student enrollment data submitted to the Information Services Branch. Students and ECS children enrolled after the **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 **count date** if the student was enrolled and in attendance prior to the **count date** and returned to class within 15 calendar days of the **count date**.
3. A **funded child/student** who was not physically in attendance in any **school authority** on the **count date** but was in attendance in a **school authority** prior to the **count date**, and then changed to a different **school authority** during the **count date** period, may be claimed by the receiving **school authority** if the **funded child/student** was enrolled and in attendance within five calendar days of the **count date**.
4. **Funded children/students** who are receiving their education in a **home education program** provided by their **parents** will be counted by the supervising **school authority** where the student is enrolled on the **count date**.
5. **School jurisdictions** or **funded private schools** offering year round education to **funded students** in Grades 1 to 9 will use **count dates** determined by School Finance on an individual basis to ensure fair and equitable funding for the students they are educating.
6. A priority **school** conflict occurs when more than one **school** claims the **funded child/student** on the **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 **count date**.

7. 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.
8. If **school authorities** cannot resolve a priority **school** conflict, they should forward supporting documentation to the School Finance Branch by May 15 for resolution as follows:

For Grades ECS to 9

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.

For Grades 10 to 12

Instructional minutes for the first term (September through January) are required. These minutes should be based on the actual attendance of the **funded child/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.

Example: If a **funded child/student** missed a total of 30 classes in the first term, the instructional minutes should be based on total class time offered in the first term minus the 30 classes missed. Do not default to total class time offered.

In making its decision, School Finance will determine the priority **school** as follows:

- a) The **school** where the **funded child** was enrolled, and in attendance, on the **count date**;
- b) If the **funded child/student** was enrolled, and in attendance, in two or more **school authorities** on the **count date**:
  - i) The **school** delivering the majority of instructional minutes in the first term of the current school year would be deemed the priority **school**; or
  - ii) In situations where instructional minutes are the same for two **school authorities**, funding will be distributed at 50% of the Base Instruction rate applicable to each **school authority**.

9. **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**. School Finance will identify these students in a turn-around report for **school authorities**.

To resolve these conflicts, the Course Conflict form must be completed and submitted to School Finance Branch by using the Funding Event System (FES) or by paper submissions. On this form, 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.

## **REQUIREMENTS**

1. Enrollment counts of **funded children/students** in ECS to Grade 12 must be completed on the **count date** and reported to the Information Services Branch by October 5.
2. The ages of all **funded students** and **funded children** must be determined as of September 1.

## **CONSIDERATIONS**

1. The Student Information System User's Guide provides additional information for reporting student enrollments.

**2006-2007  
FUNDING MANUAL  
FOR SCHOOL  
AUTHORITIES**

**FORMS SECTION  
SUMMARY OF FUNDING APPLICATION FORMS**

FORM NO.	FUNDING APPLICATION FORM	DUE DATE	RETURN TO
06AEDSA	Delegation of Signing Authority form	October 31, 2006	SF
06AE1.2a	Junior High Courses taken by senior High Students (School Jurisdictions and Private Schools)	Upon Completion of Term/Course	SF
06AE1.2b	Funded Students Attending First Nations Schools	April 30, 2007	SF
06AE1.2c	Add, Modify, Delete Form for Enrollments	*April 30, 2007	SF
06AE1.2d	Declaration of Management for 2005-2006	February 2, 2007	SF
06AE1.3	Application to Operate a New Outreach Program	March 31, 2007	ZS
06AE1.4a	Application for Reimbursement of ADL Course Costs for Home Education Students in Grades 7 to 12.	December 15, 2006 June 29, 2007	SF
06AE1.4b	Funding Application for Additional ADL Course Costs for Home Education Students in Grades 1 to 6	**	SF
06AE1.6	ECS PUF Statement of Actual Expenditures	October 31, 2007	SF
Electronic Submission	Application Form -Rural Transportation	November 30, 2006	FRA
	Application Form -Special Transportation and Boarding	November 30, 2006	FRA
	Application Form -Urban Transportation	November 30, 2006	FRA
	Application Form -ECS Transportation –Regular, Special, and Family-Oriented Programming Sessions	November 30, 2006	FRA
06AE2.3a	ECS Program Unit Funding Application	December 22, 2006	SF
06AE2.3b	PUF Application Adjustments Form	As per form	SF
06AE5.3	SuperNet Service Funding Application	***Upon Connection	STB
06AE6.1	Institutional Programs – Budget – Final	April 28, 2006	SP
		October 13, 2007	SF
06AE6.2	Regional Educational Consulting Services (RECS) Budgeted Revenues and Expenditures	June 30, 2007	SP
06AE6.4	Regional Consortium Statement of Revenues and Expenses Regional Consortium Statement of Financial Position	December 31, 2007	SF

- \* Or after receiving your first RACERS data.  
 \*\* After a full course load has been purchased for the home ed student.  
 \*\*\* By or before August 31, 2007

**IMPORTANT DEADLINES – 2006/2007 SCHOOL YEAR**

Modifications to Enrollment and Transportation Information to School Finance	April 30, 2007
Resolution of Priority School Conflicts	April 30, 2007
Back-up documentation for Priority School Conflicts	May 15, 2007
Enrollment Verification Reports to School Finance	June 30, 2007
Course and Marks Submission or Modification to IS	
First Semester	June 30, 2007
First and Second Quarter	June 30, 2007
Remaining Terms of the School Year	November 15, 2007
Course and Module Conflicts and Students Not Enrolled on the Count Date	
First Semester	July 31, 2007
First and Second Quarter	July 31, 2007
Remaining Terms of the School Year	December 21, 2007

<b>LEGEND:</b>	SF = School Finance	SP = Special Programs
	IS = Information Services	STB = Stakeholder Technology Branch
	ZS = Zone Services	FRA = Financial Reporting and Accountability



**2006-2007  
FUNDING MANUAL  
FOR SCHOOL  
AUTHORITIES**

**FORMS SECTION  
SUMMARY OF FUNDING APPLICATION FORMS**

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06AE1.2b	Funded Students Attending First Nations Schools	April 30, 2007	SF
06AE1.2c	Add, Modify, Delete Form for Enrollments	*April 30, 2007	SF
06AE1.2d	Declaration of Management for 2005-2006	February 2, 2007	SF
06AE1.3	Application to Operate a New Outreach Program	March 31, 2007	ZS
06AE1.4a	Application for Reimbursement of ADL Course Costs for Home Education Students in Grades 7 to 12.	December 15, 2006 June 29, 2007	SF
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06AE2.3b	PUF Application Adjustments Form	As per form	SF
06AE5.3	SuperNet Service Funding Application	***Upon Connection	STB
06AE6.1	Institutional Programs – Budget – Final	April 28, 2006	SP
		October 13, 2007	SF
06AE6.2	Regional Educational Consulting Services (RECS) Budgeted Revenues and Expenditures	June 30, 2007	SP
06AE6.4	Regional Consortium Statement of Revenues and Expenses Regional Consortium Statement of Financial Position	December 31, 2007	SF

- \* Or after receiving your first RACERS data.  
 \*\* After a full course load has been purchased for the home ed student.  
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**IMPORTANT DEADLINES – 2006/2007 SCHOOL YEAR**

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First and Second Quarter	July 31, 2007
Remaining Terms of the School Year	December 21, 2007

<b>LEGEND:</b>	SF = School Finance	SP = Special Programs
	IS = Information Services	STB = Stakeholder Technology Branch
	ZS = Zone Services	FRA = Financial Reporting and Accountability

# DELEGATION OF SIGNING AUTHORITY FORM 2006-2007 SCHOOL YEAR

Revised This form is provided to allow the delegation of the Secretary-Treasurer's and/or Superintendent's signing authority to other individuals who are authorized by the board to sign Alberta Education funding applications on behalf of the Secretary-Treasurer/Superintendent. In order for the delegation of authority to continue, this form must be submitted each year – even if there are no additions or deletions.

School Authority Name: \_\_\_\_\_

School Authority Code: \_\_\_\_\_

NAME (S) (Please Print)	SIGNATURES

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 2006-2007 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

## CERTIFICATION

I certify the information reported on this form is correct.

\_\_\_\_\_  
(Signature of: Secretary-Treasurer/Superintendent)

\_\_\_\_\_  
(Signature of: Teacher/Principal)

\_\_\_\_\_  
(Date)



**School Authority Code:** \_\_\_\_\_

[illegible]

**RETURN TO: SCHOOL FINANCE BRANCH BY APRIL 30, 2007**



**BASE INSTRUCTION  
ADD, MODIFY, DELETE FORM  
FOR ENROLMENTS ON SEPTEMBER 30, 2006  
2006-2007 SCHOOL YEAR**

**Authority Code:** \_\_\_\_\_ **Authority Name:** \_\_\_\_\_

**School Code:** \_\_\_\_\_ **School Name:** \_\_\_\_\_

Action: _____	Registration: _____	Grade: _____	Enrollment Date: _____
ASN: _____	Local Board ID: _____	Citizenship: _____	Expiry Date: _____
Last Name: _____	First Name: _____	Sec.23 Eligibility: _____	French Hours: _____
AKA Last Name: _____	AKA First Name: _____	Reg. Entry Status: _____	Resident Juris: _____
Birth Date: _____	Gender: _____	Exit Description: _____	Exit Date: _____
Address Line 1: _____		Special Needs: 1 _____ 2 _____	
Address Line 2: _____		Enrollment Type: 1 _____ 2 _____ 3 _____	
City: _____	Province: _____	Grant Codes: 1 _____ 2 _____ 3 _____	
Postal Code: _____	Phone: _____		

See Reverse for Legend

Comments: \_\_\_\_\_

Blended Home  
Percentage of  
Program at School

Please Note: The student must be enrolled and attending on the **count date** of the current school year.

**CERTIFICATION**

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

\_\_\_\_\_  
(Signature of: Secretary-Treasurer/Superintendent)

\_\_\_\_\_  
(Signature of: Teacher/Principal)

\_\_\_\_\_  
(Date)

## Legend

<b>Action:</b>	(A) Add, (M) Modify, (D) Delete
<b>ASN:</b>	Alberta Student Number –assigned by Alberta Education (9- Digits)
<b>Last/First Name:</b>	Student Name
<b>Local Board ID:</b>	The number assigned by the school or school authority for internal tracking (if applicable)
<b>Gender:</b>	(M) Male, (F) Female
<b>Birth Date:</b>	Year, Month, Day (YYYY, MM, DD)
<b>Enrollment Type:</b>	Refer to Code Table in Student Information System User's Guide
<b>Grant Codes:</b>	Refer to Code Table in Student Information System User's Guide
<b>Grade:</b>	(EC) Early Childhood, (01) grade 1, (02) grade 2, etc. (UG) ungraded
<b>Registration:</b>	(D) Day, (E) Evening, (S) Summer
<b>Resident Juris:</b>	Enter the school jurisdiction code for the resident school jurisdiction. This field applies to: a) Designated Special Education Private Schools (Code 110). For students who's parents consulted with their resident school jurisdiction prior to enrollment in the Designated Special Education Private School. b) Francophone students in a non-Francophone jurisdiction (Code 145) Students under an Education Services Agreement (sponsorship) (Code 140)
<b>Special Needs:</b>	The following codes are for students and ECS children who have identified special needs. For funding purposes they should also be coded with the 500 Grants Program code.

### Severely Disabled (Grades ECS – 12)

- (41) Severe Cognitive Disability
  - (42) Severe Emotional/Behavioural Disability
  - (43) Severe Multiple Disability
  - (44) Severe Physical or Medical Disability
  - (45) Deafness
  - (46) Blindness
  - (47) Severe Delay Involving Language (ECS children only)
- Other
- (10) Developmentally Immature (ECS only, do not use 500 code)
  - (80) Gifted/Talented (ECS – Grade 12)

### Mildly or Moderately Disabled

- (30) ECS Mild/Moderate Disability/Delay
- Grades 1 - 12
- (51) Mild Cognitive Disability
  - (52) Moderate Cognitive Disability
  - (53) Emotional/Behavioural Disability
  - (54) Learning Disability (All LD Students)
  - (55) Hearing Disability. Hard of hearing.
  - (56) Visual Disability
  - (57) Communication Disability
  - (58) Physical or Medical Disability
  - (59) Multiple Disability

<b>French Hours:</b>	The number of hours taught per year in French Language
<b>Enrollment Date:</b>	Year, Month, Day (YYYY, MM, DD)

**DECLARATION OF MANAGEMENT  
2005 - 2006 SCHOOL YEAR**

School Jurisdiction Name: \_\_\_\_\_

School Authority Code: \_\_\_\_\_

“As the Superintendent and Secretary-Treasurer, we certify that the Credit Enrollment Units (CEUs) submitted by the jurisdiction are complete, accurate and do not contravene, either directly or indirectly, the funding requirements for CEU funding as outlined in Alberta Education’s *Funding Manual for School Authorities*.”

“As the Board Chairman, Superintendent and Secretary-Treasurer, we support the education practices of the jurisdiction and affirm that the policies of the jurisdiction are in alignment with the intent of education funding to provide a quality education that best meets the needs of students.”

TITLE	SIGNATURES	DATE
Board Chairman		
Superintendent		
Secretary Treasurer		

**APPLICATION TO OPERATE A  
NEW OUTREACH PROGRAM**

An outreach program is a program offered by a school to provide a basic education for funded students who are unable to attend or benefit from a regular school program. For the program requirements, refer to the *Funding Manual for School Authorities* Part 1, Section 1.3, and the *Policy, Regulations and Forms Manual (Outreach Program Policy 1.1.4)*.

**School Jurisdiction:** \_\_\_\_\_  
**Name and Code of School Jurisdiction**

**Superintendent:** \_\_\_\_\_

**Name of Outreach Program:** \_\_\_\_\_

**Grades Offered:** \_\_\_\_\_

**Principal Responsible for Outreach Program:** \_\_\_\_\_

**Will the program require a school code:** Yes ☐ No ☐ (please check one)

**If NO:** \_\_\_\_\_  
**Name and Code of School Offering Outreach Program**

**Telephone Number of Outreach Program:** (\_\_\_\_) \_\_\_\_\_

**Fax Number of Outreach Program:** (\_\_\_\_) \_\_\_\_\_

**Physical Location of Outreach Program (Address):** \_\_\_\_\_

\_\_\_\_\_

**Mailing Address (if different from address above):** \_\_\_\_\_

\_\_\_\_\_

***School boards intending to offer an outreach program must identify a stand-alone facility for each program. Boards must ensure that the building used for the program meets and will continue to meet all applicable local and provincial health, safety and building standards. Please provide a program plan on page 3 of this form. A copy of the board policy regarding outreach programs must be attached to this form. Board policy must be consistent with conditions as outlined in the Funding Manual for School Authorities, (Section 1.3) and the Policy, Regulations and Forms Manual (Outreach Program Policy 1.1.4).***



## **Outreach Program Description**

### **Rationale for the Outreach Program Application:**

Note: Prior to making an application superintendents should consider how they might meet the needs of these students through existing funding sources, modifications to existing school programs, and partnerships with other school jurisdictions and community service agencies.

### **Please provide the following information to complete your application and attach a program plan.**

1. Describe the unique needs of the student population that the program will serve and the grade levels offered.
  
2. How will the program serve students who could not be served at a traditional school setting? Describe the type of programming that would be offered, such as Alberta Distance Learning (ADL) courses and the method of evaluation that will be used for students and for the program.
  
3. What connections has the program made or is the program planning to make with other service organizations to demonstrate and enhance community support and involvement for the program?
  
4. What additional supports will be offered to assist these students in becoming successful community members (e.g., counseling; anger management, time management, etc.)?
  
5. How far away is the program located from another outreach program?

6. Does the jurisdiction offer other outreach programs? If so, please provide the name(s) of the other outreach program(s).
7. What is the potential to partner with another jurisdiction to offer the outreach program?
8. Has the board passed a motion to establish an outreach program and developed a policy for the outreach program (please attach a copy of the board motion and the policy)?
9. Describe and name the stand-alone facility in which the outreach program will be located. Attach a health and safety inspection or indicate when these will be completed.

**Note: Alberta Education will not automatically approve all applications for new Outreach Programs. The applicant must clearly establish that:**

- 1) The jurisdiction has a reasonable number of students with extraordinary needs, and;**
- 2) The only reasonable way to meet these needs is through establishment of an Outreach Program.**

Please also note that a Field Services manager will conduct an on-site visit to confirm the implementation of the approved program.

For further information about establishing an outreach program, please refer to the *Outreach Programs Handbook* (<http://www.education.gov.ab.ca/educationsystem/OutreachProgHandbook.pdf>)

**DECLARATION:**

I declare this program will be offered in accordance with the requirements identified in the *Funding Manual for School Authorities* and the *Policy, Regulations and Forms Manual*.

---

Superintendent

---

Date

**RECOMMENDED FOR APPROVAL:**

---

Reviewer (Education Manager)

---

Date

**APPROVAL FOR OUTREACH PROGRAM:**

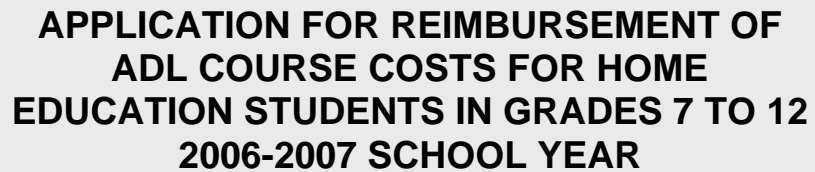
---

Director

---

Date

***Submit to Zone Services Branch, Alberta Education, 9<sup>th</sup> Floor East, 44  
Capital Boulevard, 10044 - 108 Street, Edmonton, Alberta, T5J 5E6***



**Name of School Authority:** \_\_\_\_\_ **Authority Code:** \_\_\_\_\_

Name of School: School Code:

## Updated

**Note: Approved ADL course costs will be reimbursed at 50% to a maximum of \$1,323 per student.**

## CERTIFICATION

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

(Date)

**ALBERTA DISTANCE LEARNING CENTRE PRINT COURSE COSTS**  
**APPROVED FOR REIMBURSEMENT BY ALBERTA EDUCATION**

**REIMBURSEMENT WILL BE AT 50% OF THE APPROVED ADL COURSE COSTS COLUMN**

Grade	Course Code	ADL Course	Tuition Fee	Lesson Materials and Required Resources	Approved ADL Course Costs
<b>Grade 7</b>	7100	Language Arts 7	\$125.00	\$110.00	\$235.00
	7110	Mathematics 7	\$125.00	\$80.00	\$205.00
	7130	Health & Personal Life Skills 7	\$125.00	\$60.00	\$185.00
	7140	Science 7	\$125.00	\$135.00	\$260.00
	7150	Social Studies 7	\$125.00	\$135.00	\$260.00
	7160	Physical Education	\$100.00	\$80.00	\$180.00
	7210	Mathematics 7 Modified	\$125.00	\$80.00	\$205.00
	7310	Art A	\$100.00	\$40.00	\$140.00
	7410	Music A	\$100.00	\$80.00	\$180.00
	7550	Environmental and Outdoor Education (Year 1)	\$100.00	\$90.00	\$190.00
<b>Grade 8</b>	8100	Language Arts 8	\$125.00	\$110.00	\$235.00
	8110	Mathematics 8	\$125.00	\$80.00	\$205.00
	8130	Health & Personal Life Skills 8	\$125.00	\$80.00	\$205.00
	8140	Science 8	\$125.00	\$130.00	\$255.00
	8150	Social Studies 8	\$125.00	\$125.00	\$250.00
	8210	Mathematics 8 Modified	\$125.00	\$80.00	\$205.00
	8310	Art B	\$100.00	\$40.00	\$140.00
<b>Grade 9</b>	9100	Language Arts 9	\$125.00	\$120.00	\$245.00
	9110	Mathematics 9	\$125.00	\$80.00	\$205.00
	9130	Health & Personal Life Skills 9	\$125.00	\$100.00	\$225.00
	9140	Science 9	\$125.00	\$125.00	\$250.00
	9150	Social Studies 9	\$125.00	\$140.00	\$265.00
	9210	Mathematics 9 Modified	\$125.00	\$80.00	\$205.00
	9310	Art C	\$100.00	\$40.00	\$140.00

**ALBERTA DISTANCE LEARNING CENTRE PRINT COURSE COSTS**  
**APPROVED FOR REIMBURSEMENT BY ALBERTA EDUCATION**

**REIMBURSEMENT WILL BE AT 50% OF THE APPROVED ADL COURSE COSTS COLUMN**

<b>Grade</b>	<b>Course Code</b>	<b>ADL Course</b>	<b>Tuition Fee</b>	<b>Lesson Materials and Required Resources</b>	<b>Approved ADL Course Costs</b>
<b>Grades</b>	AGR1010	Agriculture 1010	\$25.00	\$30.00	\$55.00
<b>10, 11, and 12</b>	AGR1060	Agriculture 1060	\$25.00	\$30.00	\$55.00
	AGR1110	Agriculture 1110	\$25.00	\$30.00	\$55.00
	CMH1010	Family Dynamics	\$25.00	\$30.00	\$55.00
	CMH1050	Child Development	\$25.00	\$30.00	\$55.00
	CMH1060	Home Care 1	\$25.00	\$30.00	\$55.00
	CMH2010	Adolescent Health Issues	\$25.00	\$30.00	\$55.00
	CMH3010	Family Issues	\$25.00	\$30.00	\$55.00
	CMH3020	Parenting	\$25.00	\$30.00	\$55.00
	CMH3030	Aging	\$25.00	\$30.00	\$55.00
	CMH3040	Prenatal and Postnatal Care	\$25.00	\$30.00	\$55.00
	CMH3140	Perspectives on Marriage	\$25.00	\$30.00	\$55.00
	COM1020	Media and You	\$25.00	\$30.00	\$55.00
	COM1070	Animation 1	\$25.00	\$30.00	\$55.00
	CTR1010	Job Preparation	\$25.00	\$30.00	\$55.00
	DES1010	Sketch, Draw, and Model	\$25.00	\$30.00	\$55.00
	DES1020	The Design Process	\$25.00	\$30.00	\$55.00
	DES1060	Drafting and Design Fundamentals	\$25.00	\$30.00	\$55.00
	DES2010	2D Design Applications	\$25.00	\$30.00	\$55.00
	ELA1104	English 10-2	\$125.00	\$120.00	\$245.00
	ELA1105	English 10-1	\$125.00	\$130.00	\$255.00
	ELA2104	English 20-2	\$125.00	\$120.00	\$245.00
	ELA2105	English 20-1	\$125.00	\$135.00	\$260.00
	ELA3104	English 30-2	\$125.00	\$140.00	\$265.00
	ELA3105	English 30-1	\$125.00	\$135.00	\$260.00
	ELT1010	Electro-Assembly 1	\$25.00	\$65.00	\$90.00

**ALBERTA DISTANCE LEARNING CENTRE PRINT COURSE COSTS**  
**APPROVED FOR REIMBURSEMENT BY ALBERTA EDUCATION**

**REIMBURSEMENT WILL BE AT 50% OF THE APPROVED ADL COURSE COSTS COLUMN**

Grade	Course Code	ADL Course	Tuition Fee	Lesson Materials and Required Resources	Approved ADL Course Costs
<b>Grades</b>	ESL1121	English as a Second Language 10, Level 2	\$125.00	\$75.00	\$200.00
<b>10, 11, and 12</b>	FAS1030	Ready, Set, Sew!	\$25.00	\$30.00	\$55.00
	FAS1040	Fashion Basics	\$25.00	\$30.00	\$55.00
	FAS1050	Repair and Recycle	\$25.00	\$30.00	\$55.00
	FAS1060	Creating Accessories 1	\$25.00	\$30.00	\$55.00
	FAS1070	Creative Yarns/Textiles	\$25.00	\$30.00	\$55.00
	FAS2070	Creative Construction	\$25.00	\$30.00	\$55.00
	FAS2080	Activewear	\$25.00	\$30.00	\$55.00
	FAS2090	Specialty Fabrics 1	\$25.00	\$30.00	\$55.00
	FAS2110	Creating Home Decor	\$25.00	\$30.00	\$55.00
	FIN1010	Financial Information	\$25.00	\$30.00	\$55.00
	FIN1020	Service Business 1	\$25.00	\$30.00	\$55.00
	FIN1030	Service Business 2	\$25.00	\$30.00	\$55.00
	FIN2010	Taxation	\$25.00	\$30.00	\$55.00
	FIN2020	Merchandising Business 1	\$25.00	\$30.00	\$55.00
	FIN2030	Merchandising Business 2	\$25.00	\$30.00	\$55.00
	FIN3010	Advanced Accounting	\$25.00	\$30.00	\$55.00
	FIN3020	Management Accounting	\$25.00	\$30.00	\$55.00
	FIN3030	Business Organizations	\$25.00	\$30.00	\$55.00
	FIN3040	Financial Statements	\$25.00	\$30.00	\$55.00
	FIN3060	Financial Analysis	\$25.00	\$30.00	\$55.00
	FNA1400	Art 10 – 3 credits	\$75.00	\$25.00	\$100.00
		Art 10 – 4 credits	\$100.00	\$35.00	\$135.00
		Art 10 – 5 credits	\$115.00	\$40.00	\$155.00
	FNA1405	Art 11	\$125.00	\$90.00	\$215.00
	FNA2400	Art 20	\$125.00	\$65.00	\$190.00

**ALBERTA DISTANCE LEARNING CENTRE PRINT COURSE COSTS**  
**APPROVED FOR REIMBURSEMENT BY ALBERTA EDUCATION**

**REIMBURSEMENT WILL BE AT 50% OF THE APPROVED ADL COURSE COSTS COLUMN**

<b>Grade</b>	<b>Course Code</b>	<b>ADL Course</b>	<b>Tuition Fee</b>	<b>Lesson Materials and Required Resources</b>	<b>Approved ADL Course Costs</b>
<b>Grades</b>	FNA2405	Art 21	\$125.00	\$90.00	\$215.00
<b>10, 11, and 12</b>	FNA3400	Art 30	\$125.00	\$75.00	\$200.00
	FNA3405	Art 31	\$125.00	\$90.00	\$215.00
	FOR1010	Why Forestry	\$25.00	\$30.00	\$55.00
	FOR1090	Forest Ecology 1	\$25.00	\$30.00	\$55.00
	FOR2010	Making a Difference	\$25.00	\$30.00	\$55.00
	INF1020	Keyboarding 1	\$25.00	\$90.00	\$115.00
	INF2030	Keyboarding 2	\$25.00	\$90.00	\$115.00
	INF2040	Keyboarding 3	\$25.00	\$90.00	\$115.00
	INF3030	Keyboarding 4	\$25.00	\$90.00	\$115.00
	INF3040	Keyboarding 5	\$25.00	\$90.00	\$115.00
	INF3050	Keyboarding 6	\$25.00	\$90.00	\$115.00
	LDC2460	Religious Studies 25	\$125.00	\$60.00	\$185.00
	LDC2754	Forensic Science 25	\$75.00	\$50.00	\$125.00
	LDC3164	Abnormal Psychology 35	\$75.00	\$50.00	\$125.00
	LGS1010	You and the Law 1	\$25.00	\$30.00	\$55.00
	LGS1020	You and the Law 2	\$25.00	\$40.00	\$65.00
	LGS2020	Labour Law	\$25.00	\$50.00	\$75.00
	LGS2030	Environmental Law	\$25.00	\$50.00	\$75.00
	LGS3010	Consumer and Property Law	\$25.00	\$50.00	\$75.00
	LGS3040	Negligence	\$25.00	\$50.00	\$75.00
	LGS3050	Law and Small Business	\$25.00	\$50.00	\$75.00
	LGS3080	Criminal Law	\$25.00	\$50.00	\$75.00
	MAM3010	The Business Organization	\$25.00	\$30.00	\$55.00
	MAM3020	Business in the Canadian Economy	\$25.00	\$30.00	\$55.00
	MAM3030	Business in the Global Marketplace	\$25.00	\$30.00	\$55.00



**ALBERTA DISTANCE LEARNING CENTRE PRINT COURSE COSTS**  
**APPROVED FOR REIMBURSEMENT BY ALBERTA EDUCATION**

***REIMBURSEMENT WILL BE AT 50% OF THE APPROVED ADL COURSE COSTS COLUMN***

<b>Grade</b>	<b>Course Code</b>	<b>ADL Course</b>	<b>Tuition Fee</b>	<b>Lesson Materials and Required Resources</b>	<b>Approved ADL Course Costs</b>
<b>Grades</b>	MAM3040	Promotion: Sales Techniques	\$25.00	\$30.00	\$55.00
<b>10, 11, and 12</b>	MAM3050	Distributing Goods and Services	\$25.00	\$30.00	\$55.00
	MAT1037	Pure Mathematics 10	\$125.00	\$100.00	\$225.00
	MAT1038	Applied Mathematics 10	\$125.00	\$95.00	\$220.00
	MAT1041	Mathematics Preparation 10	\$125.00	\$80.00	\$205.00
	MAT1225	Mathematics 14	\$125.00	\$95.00	\$220.00
	MAT2037	Pure Mathematics 20	\$125.00	\$100.00	\$225.00
	MAT2038	Applied Mathematics 20	\$125.00	\$100.00	\$225.00
	MAT2225	Mathematics 24	\$125.00	\$95.00	\$220.00
	MAT3037	Pure Mathematics 30	\$125.00	\$100.00	\$225.00
	MAT3038	Applied Mathematics 30	\$125.00	\$100.00	\$225.00
	MAT3211	Mathematics 31	\$125.00	\$80.00	\$205.00
	MEC1040	Engine Fundamentals	\$25.00	\$30.00	\$55.00
	OTH1999	Special Projects 10 – 3 credits	\$75.00	\$0.00	\$75.00
		Special Projects 10 – 5 credits	\$125.00	\$0.00	\$125.00
	OTH2999	Special Projects 20 – 3 credits	\$75.00	\$0.00	\$75.00
		Special Projects 20 – 5 credits	\$125.00	\$0.00	\$125.00
	OTH3999	Special Projects 30 – 3 credits	\$75.00	\$0.00	\$75.00
		Special Projects 30 – 5 credits	\$125.00	\$0.00	\$125.00
	PED1445	Physical Education 10 – 3 credits	\$75.00	\$40.00	\$115.00
		Physical Education 10 – 5 credits	\$125.00	\$40.00	\$165.00
	PED0770	Career and Life Management (CALM)	\$75.00	\$70.00	\$145.00
	SCN1270	Science 10	\$125.00	\$100.00	\$225.00
	SCN1288	Science 14	\$125.00	\$100.00	\$225.00
	SCN2231	Biology 20	\$125.00	\$195.00	\$320.00
	SCN2242	Chemistry 20	\$125.00	\$175.00	\$300.00

**ALBERTA DISTANCE LEARNING CENTRE PRINT COURSE COSTS**  
**APPROVED FOR REIMBURSEMENT BY ALBERTA EDUCATION**

**REIMBURSEMENT WILL BE AT 50% OF THE APPROVED ADL COURSE COSTS COLUMN**

Grade	Course Code	ADL Course	Tuition Fee	Lesson Materials and Required Resources	Approved ADL Course Costs
<b>Grades</b>	SCN2261	Physics 20	\$125.00	\$180.00	\$305.00
<b>10, 11, and 12</b>	SCN2288	Science 24	\$125.00	\$100.00	\$225.00
	SCN3230	Biology 30	\$125.00	\$175.00	\$300.00
	SCN3240	Chemistry 30	\$125.00	\$215.00	\$340.00
	SCN3260	Physics 30	\$125.00	\$200.00	\$325.00
	SCN3270	Science 30	\$125.00	\$190.00	\$315.00
	SPN1345	Spanish Language and Culture 10	\$125.00	\$45.00	\$170.00
	SPN2345	Spanish Language and Culture 20	\$125.00	\$60.00	\$185.00
	SPN3345	Spanish Language and Culture 30	\$125.00	\$75.00	\$200.00
	SSN2171	Personal Psychology 20	\$75.00	\$50.00	\$125.00
	SSN2172	General Psychology 20	\$75.00	\$50.00	\$125.00
	SSN2176	General Sociology 20	\$75.00	\$50.00	\$125.00
	SSN3166	World Geography 30	\$75.00	\$50.00	\$125.00
	SST1150	Social Studies 10	\$125.00	\$80.00	\$205.00
	SST1151	Social Studies 13	\$125.00	\$90.00	\$215.00
	SST2150	Social Studies 20	\$125.00	\$80.00	\$205.00
	SST2151	Social Studies 23	\$125.00	\$80.00	\$205.00
	SST3150	Social Studies 30	\$125.00	\$80.00	\$205.00
	SST3151	Social Studies 33	\$125.00	\$80.00	\$205.00
	TOU1010	The Tourism Industry	\$25.00	\$40.00	\$65.00
	TOU3030	Food Service Operations	\$25.00	\$40.00	\$65.00
	TOU3040	Hotel/Motel Operations	\$25.00	\$40.00	\$65.00
	TOU3060	Travel Agency Operations	\$25.00	\$40.00	\$65.00
	TOU3070	Reservations and Ticketing	\$25.00	\$40.00	\$65.00
	TOU3080	Air Transportation	\$25.00	\$40.00	\$65.00
	WLD1070	Hunting and Game Management 1	\$25.00	\$50.00	\$75.00



Name of School Authority: Authority 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*
<b>TOTAL</b>			\$

## CERTIFICATION

(Signature of: Secretary-Treasurer/Superintendent)

(Signature of: Teacher/Principal)

**(Date)**

## 2006-2007 Elementary Grades 1 to 6 ADL Course Costs (taken at the ALDC)

	<b>Grade 1</b>	<b>Grade 2</b>	<b>Grade 3</b>	<b>Grade 4</b>	<b>Grade 5</b>	<b>Grade 6</b>
<b>Course</b>	Thematics 1	Thematics 2	Thematics 3	Language Arts 4	Language Arts 5	Language Arts 6
<i>Tuition</i>	\$205.00	\$205.00	\$205.00	\$105.00	\$105.00	\$105.00
<i>Lesson Materials &amp; Required Resources</i>	\$270.00	\$295.00	\$290.00	\$140.00	\$145.00	\$115.00
<b>Course</b>	Mathematics 1	Mathematics 2	Mathematics 3	Mathematics 4	Mathematics 5	Mathematics 6
<i>Tuition</i>	\$105.00	\$105.00	\$105.00	\$105.00	\$105.00	\$105.00
<i>Lesson Materials &amp; Required Resources</i>	\$100.00	\$110.00	\$140.00	\$145.00	\$140.00	\$135.00
<b>Course</b>				Social Studies 4	Social Studies 5	Social Studies 6
<i>Tuition</i>				\$105.00	\$105.00	\$105.00
<i>Lesson Materials &amp; Required Resources</i>				\$85.00	\$95.00	\$80.00
<b>Course</b>				Science 4	Science 5	Science 6
<i>Tuition</i>				\$105.00	\$105.00	\$105.00
<i>Lesson Materials &amp; Required Resources</i>				\$ 85.00	\$105.00	\$ 85.00
<b>Total Cost</b>	<b>\$680.00</b>	<b>\$715.00</b>	<b>\$740.00</b>	<b>\$875.00</b>	<b>\$905.00</b>	<b>\$835.00</b>
<i>Less: 50% funding provided by supervising board</i>	\$655.00	\$655.00	\$655.00	\$655.00	\$655.00	\$655.00
<b>Excess costs eligible for additional funding</b>	<b>\$25.00</b>	<b>\$60.00</b>	<b>\$85.00</b>	<b>\$220.00</b>	<b>\$250.00</b>	<b>\$180.00</b>

**ECS PROGRAM UNIT FUNDING  
STATEMENT OF ACTUAL EXPENDITURES  
FOR SCHOOL JURISDICTIONS  
2006-2007 SCHOOL YEAR**

**NAME OF SCHOOL JURISDICTION:** \_\_\_\_\_

- Complete one statement of actual expenditures for all Program Unit Funded (PUF) children (except designated special education ECS programs). School jurisdictions participating in the PUF Pilot only need to complete one statement even if they have a designated program(s).
- School jurisdictions with approved Designated Special Education ECS programs must complete a separate form for each designated program unless the jurisdiction is part of the PUF Pilot.
- 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, Part 1, Section 1.6

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 2006-2007 SCHOOL YEAR

NAME OF SCHOOL JURISDICTION: \_\_\_\_\_

## INSTRUCTION

Salaries and Wages	\$	
Employer's Portion of Fringe Benefits	\$	
Services Purchased	\$	
Supplies and Materials	\$	

## PARENT INSERVICE/STAFF INSERVICE

\$ \_\_\_\_\_

## TRANSPORTATION COSTS:

\$ \_\_\_\_\_

	<u>Actual Cost</u> (A)	<u>Revenue</u> (B)	
To and From School	\$ _____	\$ _____	
Family-Oriented Programming Sessions	\$ _____	\$ _____	
Other	\$ _____	\$ _____	
<b>TOTALS</b>	\$ _____	\$ _____	

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

PROGRAM ADMINISTRATION COSTS (for Designated Sp. Ed. ECS Operators only) \$ \_\_\_\_\_

CAPITAL: FURNITURE AND EQUIPMENT \$ \_\_\_\_\_

(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)

<b>TOTAL ECS PUF EXPENDITURES</b>	\$ _____
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## FOR DESIGNATED SPECIAL EDUCATION ECS PROGRAMS ONLY

### LESS: APPLICABLE REVENUES

• Base Instruction funding	-# of ECS Children on Sept. 30	_____	x	\$2,544	\$	
• Mild or Moderate funding	-# of ECS Children on Sept. 30	_____	x	\$2,197	\$	
• Other Revenues (please specify)	_____				\$	

**TOTAL REVENUES** \$ \_\_\_\_\_

**NET ECS PROGRAM COSTS ELIGIBLE FOR PUF** \$ \_\_\_\_\_

## ECS PROGRAM UNIT FUNDING APPLICATION 2006-2007 SCHOOL YEAR

Refer to Part 1, Section 1.6 (School Jurisdictions) and Part 2, Section 2.3 (Private ECS Operators) of the Funding Manual for School Authorities for information on the completion of this application.

**Submit one copy of this application for each school/centre to School Finance**

**Name of School Jurisdiction/Private School/Society:** \_\_\_\_\_

**Name of School/Centre:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Postal Code:** \_\_\_\_\_

**Contact Person:** \_\_\_\_\_

**Telephone No:** \_\_\_\_\_

**E-Mail Address:** \_\_\_\_\_

**Fax No:** \_\_\_\_\_

**Number of Program Unit Children:**  
(claimed on this application)

**Budget Amount:**  
(for this application)

\$

**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 or Part 1, Section 1.6 or Part 2, Section 2.3 of the Funding Manual for School Authorities.
- 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 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)

### FOR DEPARTMENT USE:

**APPROVED BY:** \_\_\_\_\_  
(Signature of Performance Certifier)  
Special programs Branch

**Amount Approved:** \$ \_\_\_\_\_

\_\_\_\_\_  
(Signature of Expenditure Officer)  
School Finance Branch

**Date Approved:** \_\_\_\_\_





## CRITERIA FOR DETERMINING ELIGIBILITY FOR PROGRAM UNIT FUNDING

### Description of Severe Disabilities/Delays

#### **SEVERE COGNITIVE DISABILITY (Code 41)**

A **funded student/funded child** with a severe cognitive disability is one who:

- a) has severe delays in all or most areas of development;
- b) frequently has other disabilities including physical, sensory, medical and/or behavioural;
- c) requires constant assistance and/or supervision in all areas of functioning including daily living skills and may require assistive technology;
- d) should have a standardized assessment, which indicates functioning in the severe to profound range (standardized score of  $30 \pm 5$  or less). Functional assessments by a qualified professional will also be considered in cases where the disabilities of the person preclude standard assessments; and
- e) has scores equivalent to the severe to profound levels on an adaptive behavioural scale (e.g., AAMR Adaptive Behaviour Scales-School: Second Edition (ABS-S:2); Vineland Adaptive Behaviour Scales; Scales of Independent Behaviour-Revised).

#### **SEVERE EMOTIONAL/BEHAVIOURAL DISABILITY (Code 42)**

A **funded student/funded child** with a severe emotional/behavioural disorder is one who:

- a) displays chronic, extreme and pervasive behaviours which require close and constant adult supervision, high levels of structure, and other intensive support services in order to function in an educational setting. The behaviours significantly interfere with both the learning and safety of the student/ECS child and other students/ECS children. For example, the student/child could be dangerously aggressive and destructive (to self and/or others), violent and/or extremely compulsive; and
- b) (for Grade 1-12 students) has a diagnosis including conduct disorder, schizophrenia or bi-polar disorder, obsessive/compulsive disorders, or severe chronic clinical depression; and may display self-stimulation or self-injurious behaviour. In the most extreme and pervasive instances, severe Oppositional Defiant Disorder may qualify; or
- c) (for ECS children) has either a diagnosis or a statement by a qualified professional indicating that the child experiences severe emotional/behavioural difficulties.

A clinical diagnosis within the last 2 years of a severe emotional/behavioural disorder by a psychiatrist, chartered psychologist or a developmental pediatrician is required, in addition to extensive documentation of the nature, frequency and severity of the disorder by **school authorities**. In the case of an ECS child who is not currently placed in a learning environment, extensive documentation of the nature, frequency, and severity of the disorder by the referring specialist may suffice. The effects of the disability on the student's/ECS child's functioning in an education setting must be described. An ongoing treatment plan/behaviour plan should be available and efforts should be made to ensure that the student/ECS child has access to appropriate mental health and therapeutic services.

A clinical diagnosis of a severe emotional/behavioural disorder is not necessarily sufficient to qualify under this category. Some diagnoses with behavioural components that are not sufficient to qualify are: Attention-Deficit/Hyperactivity Disorder (AD/HD), Attention Deficit Disorder (ADD).

#### **SEVERE MULTIPLE DISABILITY (Code 43)**

A **funded student/funded child** with multiple disabilities is one who:

- a) has two or more non-associated moderate to severe cognitive and/or physical disabilities which, in combination, result in the student functioning at a severe to profound level; and
- b) requires significant special programs, resources and/or therapeutic services.

**Students/ECS children with a severe disability** and another associated disability should be identified under the category of the primary severe disability. For example:

- A student/ECS child with a severe cognitive disability and another associated disability is not designated under this category, but is designated under severe cognitive disability.
- A student/ECS child with a severe emotional/behavioural disability and another associated disability is not designated under this category, but is designated under severe emotional/behavioural disability.

The following mild or moderate disabilities cannot be used in combination with other disabilities to qualify under Code 43:

- a) Attention Deficit/Hyperactivity Disorder (AD/HD) Attention Deficit Disorder (ADD) (ECS – gr. 12)
- b) Emotional/Behavioural Disabilities (ECS – gr. 12)
- c) Learning Disability (Grades 1 – 12 only)
- d) Speech and Language Related Delays (ECS – Grade 12)

NOTE: ECS children diagnosed with Down Syndrome in the most severe cases should be reported under Severe Multiple Disability (Code 43).

#### **SEVERE PHYSICAL OR MEDICAL DISABILITY – including Autism (Code 44)**

A **funded student/funded child** with a severe physical, medical or neurological disability is one who:

- a) has a medical diagnosis of a physical disability, specific neurological disorder or medical condition which creates a significant impact on the student's/ECS child's ability to function in the **school** environment (note: some physical or medical disabilities have little or no impact upon the student's/ECS child's ability to function in the **school** environment); and
- b) requires extensive adult assistance and modifications to the education environment in order to benefit from schooling.

A student/ECS child with severe autism or other severe Pervasive Developmental Disorder is included in this category. A clinical diagnosis by a psychiatrist, chartered psychologist, or medical professional specializing in the field of autism is required. A clinical diagnosis of autism is not necessarily sufficient to qualify under this category. Eligibility is determined by the functioning level of the student/ECS child with autism.

In order for a diagnosis of autism to be made, the student/ECS child needs to demonstrate impairment in the following areas:

- Social interaction; and
- Communication; and
- Stereotyped pattern of behaviour (i.e. hand flapping, body rocking, echolalia, insistence on sameness and resistance to change).

A student/ECS child diagnosed with severe Fetal Alcohol Spectrum Disorder (FASD) may have Fetal Alcohol Syndrome (FAS) or Alcohol-Related Neurodevelopmental Disorder (ARND) and is included in this category (Code 44 – Severe Physical or Medical Disability – Including Autism). A clinical diagnosis by a psychiatrist, chartered psychologist with specialized training, or medical professional specializing in developmental disorder is required. A clinical diagnosis of FASD is not necessarily sufficient to qualify under this category. Eligibility is determined by the functioning level of the student with FASD. Students/ECS children with severe FASD who exhibit significant impairment in the areas of social functioning, life skills, behaviour, learning, attention and concentration, will need extensive intervention and support.

#### **DEAFNESS (Code 45)**

A **funded student/funded child** with a profound hearing loss is one who:

- a) has a hearing loss of 71 decibels (dB) or greater unaided in the better ear over the normal speech range (500 to 4000 hertz (Hz)) which interferes with the use of oral language as the primary form of communication, or has a cochlear implant; and
- b) requires extensive modification and specialized educational supports; and
- c) has a diagnosis by a clinical or educational audiologist. New approvals require an audiogram within the past 3 years.

If a student/ECS child has a severe to profound sensori-neural hearing loss that has not changed significantly since the initial approval by Alberta Education, documentation from a qualified specialist in the field of deafness outlining the severity of the hearing loss and modifications to the learning environment may be sufficient to support eligibility.

#### **BLINDNESS (Code 46)**

A **funded student/funded child** with severe vision impairment is one who:

- a) Has corrected vision so limited that it is inadequate for most or all instructional situations, and information must be presented through other means; and
- b) Has visual acuity ranging from 6/60 (20/200) in the better eye after correction, to having no usable vision or field of vision reduced to an angle of 20 degrees.

If a student/ECS child has a severe to profound visual impairment that has not changed significantly since the initial approval by Alberta Education, documentation from a qualified specialist in the field of vision outlining the severity of the disability and modifications to the learning environment may be sufficient to support eligibility.

For those students/ECS children who may be difficult to assess (e.g. cortical blindness – developmentally delayed), a functional visual assessment by a qualified specialist in the field of vision or a medical professional may be sufficient to support eligibility.

#### **SEVERE DELAY INVOLVING LANGUAGE (Code 47) – For ECS children only.**

A child with a severe delay involving language is one who has difficulty communicating with peers and/or adults because of a severe delay in expressive, receptive or overall language. The following criteria determine eligibility in this category:

- a) a child who has sufficient communicative ability to permit formal speech/language assessment should demonstrate results less than or equal to the first percentile in expressive, receptive or total language. If formal language assessment is not possible, a parental report and/or observational measure may be used; or
- b) a child who has severe phonological delay and at least a moderate delay in expressive, receptive or overall language (on a formal assessment of language); or
- c) a child who has at least a moderate to severe delay in expressive, receptive or overall language delay (on a formal assessment of language) and at least a moderate to severe delay in one or more of the following areas of development: fine motor, gross motor, vision, hearing.

Alberta Education criteria for a severe delay involving language are based on a child's developmental profile, not on individual subtest scores in any single area of development. Eligibility documentation must include an assessment completed by a Speech and Language Pathologist that includes the results of measures used and a description of the child's communicative ability. In order to qualify, the language delays must have a significant impact on areas such as: functional language, social use of language, vocabulary, language concepts, mean length of utterance, grammar and acquisition of early literacy. If the child qualifies on the basis of a language delay in combination with delays in other areas, those areas of delay must be assessed by an appropriate specialist and must result in a significant impact on the child's ability to function in an ECS environment.

Assessment reports that were completed within six months of the day the child begins his/her program must be submitted to the Special Programs Branch for pre-approval of the child's eligibility or with the PUF application.

Clustering must be the first option considered when planning programming for these children. In most cases a 475 hours program is sufficient.

Children with moderate to severe delays in two or more non-associated areas (not including language) should be considered under Severe Multiple Disability (Code 43).

DETAILS of CHILDREN IN PROGRAM UNITS																		
	Alberta Student Number (ASN) #	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 ECS 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.																		
5.																		
6.																		
		SECOND PROGRAM UNIT																
1.																		
2.																		
3.																		
4.																		
5.																		
6.																		
		THIRD PROGRAM UNIT																
1.																		
2.																		
3.																		
4.																		
5.																		
6.																		
		FOURTH PROGRAM UNIT																
1.																		
2.																		
3.																		
4.																		
5.																		
6.																		

\*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.

\*\*\* Please show the total number of eligible family-oriented ECS programming sessions for the school year and the total number of hours these sessions comprise.



**PROGRAM UNIT FUNDING (PUF) BUDGET for Regular ECS Programs**

**PLEASE SUBMIT A SEPARATE BUDGET FOR EACH UNIT**

**NAME(S)** \_\_\_\_\_

**PROGRAM UNIT COSTS**

**INSTRUCTIONAL COSTS**

Salaries and Wages (# of hours \_\_\_\_\_ X \_\_\_\_\_ rate per hours) \$ \_\_\_\_\_  
 (# of hours should not exceed the child's program hours by more than 10%)

Employer's Portion of Fringe Benefits \$ \_\_\_\_\_

Services Purchased (Please specify service with # of hours and rate per hour) \$ \_\_\_\_\_

_____	_____	X \$	_____
_____	_____	X \$	_____
_____	_____	X \$	_____
_____	_____	X \$	_____

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

**PARENT INSERVICE – please specify** \_\_\_\_\_ \$ \_\_\_\_\_

**STAFF INSERVICE – please specify** \_\_\_\_\_ \$ \_\_\_\_\_

**TRANSPORTATION COSTS:**

• Transportation to and from school # trips \_\_\_\_\_ X \$ \_\_\_\_\_

• Family-Oriented Programming # sessions \_\_\_\_\_ X \$ \_\_\_\_\_

• Other: - Field Trips \_\_\_\_\_

• In-Program Transportation \_\_\_\_\_

**Total Transportation Costs** \_\_\_\_\_ **(A)**

**LESS: TRANSPORTATION REVENUES**

**Alberta Learning Special Needs Transportation Funding: (See Funding Manual, Part 2, Section 2.4 and 2.5 for Private ECS Operators and Part 1, Section 1.19 – 1.22 for School Jurisdictions.)**

• Special Transportation # trips \_\_\_\_\_ X \$ 13.92 \_\_\_\_\_

• Regular Transportation # children \_\_\_\_\_ X \$ 484/yr \_\_\_\_\_

• Family-Oriented Programming Transportation # sessions \_\_\_\_\_ X \$ 13.92 \_\_\_\_\_

• Other Transportation Revenue (i.e. fees) \_\_\_\_\_

**Total Transportation Revenues** \_\_\_\_\_ **(B)**

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

**CAPITAL COSTS (child specific only):**

**Furniture and Equipment:** Please specify: \_\_\_\_\_ \$ \_\_\_\_\_

**Note:** Please attach, to this application, a letter of recommendation from an appropriate specialist supporting the capital purchase.

**TOTAL PROGRAM UNIT COSTS** \$ \_\_\_\_\_

Guidelines for the above expenditure areas are found in the Funding Manual, Part 1, Section 1.6 or Part 2, Section 2.3

**DEPT. USE ONLY** **CEILING AMOUNT** (based on program hours and # of in-home sessions) \$ \_\_\_\_\_

**TOTAL ECS PROGRAM BUDGET FOR  
DESIGNATED SPECIAL EDUCATION ECS PROGRAM APPLYING FOR PROGRAM UNIT FUNDING (PUF)**

**ECS PROGRAM COSTS**

**INSTRUCTIONAL COSTS**

Salaries and Wages (Please provide breakdown of # of teachers, aides, etc and costs) \$ \_\_\_\_\_

Employer's Portion of Fringe Benefits \$ \_\_\_\_\_

Services Purchased (Please attach breakdown of type of service and cost) \$ \_\_\_\_\_

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

**PARENT INSERVICE**

\$ \_\_\_\_\_

**STAFF INSERVICE**

\$ \_\_\_\_\_

**TRANSPORTATION COSTS:**

• Transportation to and from school # trips \_\_\_\_\_ X \$ \_\_\_\_\_

• Family-Oriented Programming # sessions \_\_\_\_\_ X \$ \_\_\_\_\_

• Other: - Field Trips \_\_\_\_\_

• In-Program Transportation \_\_\_\_\_

**Total Transportation Costs** \_\_\_\_\_ **(A)**

**LESS: TRANSPORTATION REVENUES**

**Alberta Education Special Needs Transportation Funding: (See Funding Manual, Part 2, Section 2.4 and 2.5 for Private ECS Operators and Part 1, Section 1.19 – 1.22 for School Jurisdictions.)**

• Special Transportation # trips \_\_\_\_\_ X \$ 13.92 \_\_\_\_\_

• Regular Transportation # children \_\_\_\_\_ X \$ 484/yr \_\_\_\_\_

• Family-Oriented Programming Transportation # sessions \_\_\_\_\_ X \$ 13.92 \_\_\_\_\_

• Other Transportation Revenue (i.e. fees) \_\_\_\_\_

**Total Transportation Revenues** \_\_\_\_\_ **(B)**

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

**FACILITY COSTS (Please attach list of costs)** \$ \_\_\_\_\_

**ADMINISTRATION (Please attach a breakdown of costs)** \$ \_\_\_\_\_

**CAPITAL COSTS:**

**Furniture and Equipment:** (Please attach breakdown of costs) \$ \_\_\_\_\_

**TOTAL PROGRAM UNIT COSTS** \$ \_\_\_\_\_

**LESS: APPLICABLE REVENUES**

AB. Education Base Instruction \$ \_\_\_\_\_

Mild or Moderate \$ \_\_\_\_\_

Plant Operation and Maintenance \$ \_\_\_\_\_

AB. Education Other (please attach list) \$ \_\_\_\_\_

ECS Administration (private ECS operators only) \$ \_\_\_\_\_

Other Revenues (please specify) \$ \_\_\_\_\_

**TOTAL REVENUES** \$ \_\_\_\_\_

**NET ECS PROGRAM COSTS ELIGIBLE FOR PROGRAM UNIT FUNDING  
(total costs minus total revenues)**

\$ \_\_\_\_\_

Guidelines for the above expenditure areas are found in the Funding Manual, Part 1, Section 1.6 or Part 2, Section 2.3

**DEPT. USE ONLY CEILING AMOUNT** (based on program hours and # of in-home sessions) \$ \_\_\_\_\_

**Program Unit Funding  
PUF APPLICATION ADJUSTMENTS FORM  
2006 - 2007 School Year**

**NAME OF SCHOOL AUTHORITY:** \_\_\_\_\_

**NAME OF SCHOOL:** \_\_\_\_\_

***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). Designated Special Education ECS programs and school jurisdictions on the PUF Pilot do not need to complete this form.***

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 (if child is in a cluster please provide revised budget for all children in the cluster)***

Teacher Assistant Salaries/wages (# of hours \_\_\_\_\_ x \_\_\_\_\_ rate per hour) \$ \_\_\_\_\_

Employer's Portion of Fringe Benefits \$ \_\_\_\_\_

Services Purchased (Please specify service with # of hours and rate per hour) \$ \_\_\_\_\_

\_\_\_\_\_ (# 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 – Please specify \_\_\_\_\_ \$ \_\_\_\_\_

Staff In-service – Please specify \_\_\_\_\_ \$ \_\_\_\_\_

Transportation Costs:

• To and from school # trips \_\_\_\_\_ x \$ \_\_\_\_\_ \$ \_\_\_\_\_

• # of FOP sessions \_\_\_\_\_ x \$ \_\_\_\_\_ \$ \_\_\_\_\_

• Other: - Field Trips \$ \_\_\_\_\_

• In-Program Transportation \$ \_\_\_\_\_

Total Transportation Costs \$ \_\_\_\_\_

Capital Costs: \$ \_\_\_\_\_

**Total PUF Costs:** \$ \_\_\_\_\_

**06AE2.3b RETURN TO: SCHOOL FINANCE BRANCH BY MAIL OR FAX WITHIN 30 DAYS OF THE CHILD'S DEPARTURE**



**SUPERNET SERVICE FUNDING APPLICATION  
2006-2007 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)



# **INSTITUTIONAL PROGRAMS Funding Application Form 2006-2007 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**

☐

**FINAL COSTS**

Name of Program	School Code	Net Program Costs
<b>Total Net Program Costs</b>		

## **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 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 Special Programs Branch of Alberta Education, 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 INSTITUTIONAL PROGRAM BUDGET / FINAL COSTS 2006-2007**

**NAME OF PROGRAM:** \_\_\_\_\_

**CONTACT PERSON:** \_\_\_\_\_

**TELEPHONE:** \_\_\_\_\_

Please see Instructions (attached) for completion of this form. Also see Section 6.1 of the 2006-2007 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.

<b>1. Instructional Salary Costs</b>	FTE's	
a. Certificated Salaries & Benefits	_____	\$ _____
b. Uncertificated Salaries & Benefits	_____	\$ _____
c. Substitute Teacher(s)	_____	\$ _____
Total Instructional Salary Costs	_____	\$ _____
<b>2. Supplies and Services Costs</b>		
a. Professional Development		\$ _____
b. Educational Supplies		\$ _____
c. Education Services		\$ _____
d. Office Supplies		\$ _____
Total Supplies and Services Costs		\$ _____
<b>3. Technology costs</b> (see guidelines for formula)		\$ _____
<b>TOTAL PROGRAM COSTS</b>		\$ _____ <b>A</b>

## **REVENUES RECEIVED FOR INSTITUTIONAL STUDENTS**

Note: please do not include Institutional funding

<b>1. Base Instruction</b> (based on Sept 30 enrollments of 550 coded students)	
Number of Institutional students enrolled _____ x rate \$ _____	\$ _____
<i>For Budgets, use an estimate based on previous years Sept. 30 enrollments –please do not use the average number of students enrolled.. For Final Costs, use actual Sept 30 enrollments.</i>	
<b>2. Other funding (please specify)</b> _____	\$ _____
<b>TOTAL REVENUES</b>	\$ _____ <b>B</b>
<b>NET PROGRAM COSTS</b> (Total Program Costs less Total Revenues <b>(A – B = C)</b> )	\$ _____ <b>C</b>

### **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 2006-2007 Budgets, please use monthly enrollments for the 2005-2006 school year. For 2006-2007 Finals, please use monthly enrollments for the 2006-2007 school year.
- Step 2: Add up the enrollments for each month to get an annual total.
- Step 3: Divide the annual total by the number of months the program operated to calculate the average number of students enrolled.

**For Final claims, please attach a list of Institutional students (with ASN's) who were in attendance on Sept 30.**

## Instructions for Completion of 2006-2007 Institutional Funding Applications

**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 and they reside in the institution). 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 and do not reside in the institution (i.e., day students, 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 educational program such as; reading, math, I.Q., fine motor/gross motor  
**Note:** Counseling, therapy or psychiatric services are not to be included in this category as these are the responsibility of the government 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 audio-visual equipment, copiers, staff computers, furniture, fixtures for the classroom or office are **not** to be included in this category as these costs are the responsibility of the government agency operating the institution.

### 3. Technology Costs

Computers and computer upgrades, peripherals (printers for instructional use, peripherals for special needs students), 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
- b. (i) For regular institutional programs that have only institutional students, \$500 X the average number of students enrolled (line D of the budget form).  
(ii) For mixed programs (i.e., programs with institutional students and non-institutional students), \$500 X the average number of institutional students enrolled (line D of the budget form).
- c. Maximum of \$10,000 total per year. Requests over the maximum amount require prior approval from the Education Manager for Institutions at the Special Programs Branch.

**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 2006-2007 Budgets, please use monthly enrollments from the 2005-2006 school year. For 2006-2007 Finals, please use monthly enrollments for the 2006-2007 school year.
- Step 2: Add up the enrollments 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

# **MIXED INSTITUTIONAL PROGRAM BUDGET / FINAL COSTS 2006-2007**

**NAME OF PROGRAM:** \_\_\_\_\_

**CONTACT PERSON:** \_\_\_\_\_ **TELEPHONE:** \_\_\_\_\_

Please see Instructions (attached) for completion of this form. Also see Section 6.1 of the 2006-2007 Funding Manual for School Authorities. Note: If your program has mixture of institutional and non-institutional students, you are considered a Mixed Institutional Program and must complete this form. If your program only has institutional students, please complete the Regular Institutional Program form.

<b>1. Instructional Salary Costs</b>	FTE's			
a. Certificated Salaries & Benefits	_____	\$	_____	
b. Uncertificated Salaries & Benefits	_____	\$	_____	
c. Substitute Teacher(s)	_____	\$	_____	
Total Instructional Salary Costs	_____	\$	_____	
 <b>2. Supplies and Services Costs</b>				
a. Professional Development		\$	_____	
b. Educational Supplies		\$	_____	
c. Education Services		\$	_____	
d. Office Supplies		\$	_____	
Total Supplies and Services Costs		\$	_____	
<b>3. Technology costs</b> (see guidelines for formula)		\$	_____	
<b>TOTAL PROGRAM COSTS</b>		\$	=====	<b>A</b>
<b>Average number of students enrolled</b> (see guidelines for this calculation)			_____	<b>B</b>
<b>Average costs per student (A ÷ B)</b>		\$	_____	<b>C</b>
<b>Average number of Institutional students enrolled</b> (see guidelines)			_____	<b>D</b>
<b>PROGRAM COSTS FOR INSTITUTIONAL STUDENTS (C x D)</b>		\$	_____	<b>E</b>
 <b>REVENUES RECEIVED FOR INSTITUTIONAL STUDENTS</b>				
Note: only show revenues for institutional students. Please do not include Institutional funding nor any revenues for non-institutional students.				
<b>1. Base Instruction</b> (based on Sept 30 enrollments of 550 coded students)				
Number of Institutional students enrolled _____ x rate _____		\$	_____	
<i>For Budgets -use an estimate based on previous years Sept. 30 enrollments –please do not use the average number of students enrolled. For Final Costs, use actual Sept 30 enrollments</i>				
<b>2. Other funding (please specify)</b>	_____	\$	_____	
<b>TOTAL REVENUES FOR INSTITUTIONAL STUDENTS</b>		\$	=====	<b>F</b>
<b>NET PROGRAM COSTS FOR INSTITUTIONAL STUDENTS (E- F)</b>		\$	=====	

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

## Instructions for Completion of 2006-2007 Institutional Funding Applications

**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 and they reside in the institution). 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 and do not reside in the institution (i.e., day students, 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 educational program such as; reading, math, I.Q., fine motor/gross motor  
**Note:** Counseling, therapy or psychiatric services are not to be included in this category as these are the responsibility of the government 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 audio-visual equipment, copiers, staff computers, furniture, fixtures for the classroom or office are **not** to be included in this category as these costs are the responsibility of the government agency operating the institution.

### 3. Technology Costs

Computers and computer upgrades, peripherals (printers for instructional use, peripherals for special needs students), 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
- b. (i) For regular institutional programs that have only institutional students, \$500 X the average number of students enrolled (line D of the budget form).  
(ii) For mixed programs (i.e., programs with institutional students and non-institutional students), \$500 X the average number of institutional students enrolled (line D of the budget form).
- c. Maximum of \$10,000 total per year. Requests over the maximum amount require prior approval from the Education Manager for Institutions at the Special Programs Branch.

**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 2006-2007 Budgets, please use monthly enrollments from the 2005-2006 school year. For 2006-2007 Finals, please use monthly enrollments for the 2006-2007 school year.
- Step 2: Add up the enrollments 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

# REGIONAL EDUCATIONAL CONSULTING SERVICES (RECS) BUDGETED REVENUES AND EXPENDITURES 2006-2007 SCHOOL YEAR

RECS PROGRAM NAME: \_\_\_\_\_  
 SCHOOL JURISDICTION: \_\_\_\_\_  
 CONTACT PERSON: \_\_\_\_\_ TELEPHONE: \_\_\_\_\_

REVENUES	BASE OPERATING FUNDS BUDGET	PROV. INITIATIVES FUNDS BUDGET
▪ Alberta Education Base Operating Funds	\$ _____	\$ _____
▪ Alberta Education Provincial Initiative Funds	\$ _____	\$ _____
▪ Service Fees (from local jurisdiction)	\$ _____	\$ _____
# of service hours _____	\$ _____	\$ _____
▪ Service Fees (from other jurisdictions)	\$ _____	\$ _____
# of service hours _____	\$ _____	\$ _____
▪ Other Revenues – please specify	\$ _____	\$ _____
▪ Surplus Funds (carried over from previous years)	\$ _____	\$ _____
<b>Total Revenues</b>	<b>\$ _____</b>	<b>\$ _____</b>
<b>EXPENDITURES</b>		
▪ Consultant Salaries and Benefits (*A)	\$ _____	\$ _____
▪ Administration Salaries and Benefits (*A)	\$ _____	\$ _____
▪ Professional Services (contracted staff) (*A)	\$ _____	\$ _____
▪ Operating Costs (*B)	\$ _____	\$ _____
▪ Travel Costs	\$ _____	\$ _____
▪ Professional Development	\$ _____	\$ _____
▪ Facility Costs	\$ _____	\$ _____
▪ Administration Costs	\$ _____	\$ _____
▪ Other – please specify	\$ _____	\$ _____
<b>Total Expenditures</b>	<b>\$ _____</b>	<b>\$ _____</b>
<b>SUPLUS/(DEFICIT) FOR THE YEAR</b>	<b>\$ _____</b>	<b>\$ _____</b>

\*A – please attach schedule indicating discipline or position type, total \$, and # of FTE's.

\*B – please attach schedule of major cost categories indicating amounts

**Note: Please use same format for the reporting of actual costs on Audited Financial Statements**

## CERTIFICATION

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

\_\_\_\_\_  
 (Signature of Secretary-Treasurer)

\_\_\_\_\_  
 (Date)

## DEPARTMENT USE ONLY:

\_\_\_\_\_  
 Performance Certifier

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Expenditure Officer

\_\_\_\_\_  
 Date

**REGIONAL CONSORTIUM**  
**Statement of Revenues & Expenses**  
**For the Year Ended August 31, 2007**  
(in dollars)

Updated

**CONSORTIUM NAME:** \_\_\_\_\_

	<u>Budget 2006/2007</u>	<u>Actual 2006/2007</u>	<u>Actual 2005/2006</u>
<b>REVENUES</b>			
<b>Alberta Education:</b>			
Management & Infrastructure <b>(Note 1)</b>	_____	_____	_____
Conditional Programming Grants <b>(Schedule 1)</b>	_____	_____	_____
Other Alberta Education	_____	_____	_____
<b>Total Alberta Education</b>	_____	_____	_____
<b>Other Revenue:</b>			
Program Registration <b>(Note 2)</b>	_____	_____	_____
Grants – Non Government Sources <b>(Note 3)</b>	_____	_____	_____
Other <b>(Note 4)</b>	_____	_____	_____
(Specify) _____	_____	_____	_____
(Specify) _____	_____	_____	_____
<b>Total Other Revenues</b>	_____	_____	_____
<b>TOTAL REVENUES:</b>	_____	_____	_____
<b>EXPENSES</b>			
<b>Management &amp; Infrastructure (Note 5):</b>			
Salaries, Wages, Benefits, Contracts and Other Fixed Overheads <b>(Note 6)</b>	_____	_____	_____
Board Expenses <b>(Note 7)</b>	_____	_____	_____
<b>Programming:</b>			
Costs of Delivering Programs <b>(Note 8)</b>	_____	_____	_____
<b>Other:</b>			
(Specify) _____	_____	_____	_____
(Specify) _____	_____	_____	_____
(Specify) _____	_____	_____	_____
<b>TOTAL EXPENSES:</b>	_____	_____	_____
<b>REVENUES less EXPENSES (Note 15)</b>	_____	_____	_____
<b>Accumulated Surplus at beginning of year:</b>	_____	_____	_____
<b>Accumulated Surplus at end of year:</b>	=====	=====	=====



**REGIONAL CONSORTIUM**  
**Statement Of Financial Position**  
**As At August 31, 2007**  
(in dollars)

Updated

**CONSORTIUM NAME:** \_\_\_\_\_

	<u>August 31, 2007</u>	<u>August 31, 2006</u>
<b>ASSETS</b>		
Cash in Bank and Temporary Investments	_____	_____
Accounts Receivable <b>(Note 9)</b> :		
Province of Alberta	_____	_____
Alberta School jurisdictions	_____	_____
Other	_____	_____
Prepaid Expenses (e.g. deposits for programming)	_____	_____
Other Assets	_____	_____
<b>TOTAL ASSETS:</b>		
<b>LIABILITIES</b>		
Accounts Payable	_____	_____
Accrued Liabilities <b>(Note 10)</b>	_____	_____
Deferred Revenues		
Programming Grants <b>(Schedule 1)</b>	_____	_____
Prepaid Registration <b>(Note 11)</b>	_____	_____
Other:		
(Specify) _____	_____	_____
(Specify) _____	_____	_____
<b>TOTAL LIABILITIES:</b>		
<b>ACCUMULATED SURPLUS</b>		
Operational Reserves <b>(Note 12)</b>	_____	_____
Unrestricted Funds <b>(Note 13)</b>	_____	_____
<b>TOTAL ACCUMULATED SURPLUS (Note 15)</b>	_____	_____
<b>TOTAL LIABILITIES AND ACCUMULATED SURPLUS</b>		

**REGIONAL CONSORTIUM**  
**Schedule 1 – Conditional Grant Program Revenues**  
**For the Year Ended August 31, 2007 (in dollars)**

**NEW**

**CONSORTIUM NAME:** \_\_\_\_\_

	Revenue Deferred from Previous Year	+	ADD: Current Year Receipts (a)	-	DEDUCT: Transfers to Other Consortia (Schedule 2)	-	DEDUCT: Deferred Revenue: Programming Grants (b) (Page 2)	=	Conditional Programming Grants Revenue (Page 1)
<b>Conditional Grant Programs</b>									
(Specify) e.g. Special Education									
(Specify)									
(Specify)									
(Specify)									
(Specify)									
(Specify)									
(Specify)									
(Specify)									
(Specify)									
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(Specify)									
(Specify)									
(Specify)									
(Specify)									
(Specify)									
(Specify)									
(Specify)									
(Specify)									
(Specify)									
(Specify)									
<b>Total</b>									

- a. Current Year receipts include amounts transferred in from other Consortia.
- b. Deferred revenue on the Statement of Financial Position represents unexpected on programs or funds that will be expended transferred to other consortia next year.

**REGIONAL CONSORTIUM**  
**Schedule 2 – Transfers to Other Consortia**  
**For the Year Ended August 31, 2007 (in dollars)**

**NEW**

**CONSORTIUM NAME:** \_\_\_\_\_

	Amount Transferred 2006/2007 (a)
<b>(Specify Program)</b>	
(Specify Consortium)	
(Specify)	
(Specify)	
(Specify)	
(Specify)	
(Specify)	
(Specify)	
Total <b>(Specify Program)</b>	
<b>(Specify Program)</b>	
(Specify Consortium)	
(Specify)	
(Specify)	
(Specify)	
Total <b>(Specify Program)</b>	
<b>(Specify Program)</b>	
(Specify Consortium)	
(Specify)	
(Specify)	
(Specify)	
Total <b>(Specify Program)</b>	
<b>(Specify Program)</b>	
(Specify Consortium)	
(Specify)	
(Specify)	
(Specify)	
Total <b>(Specify Program)</b>	
<b>(Specify Program)</b>	
(Specify Consortium)	
(Specify)	
(Specify)	
(Specify)	
Total <b>(Specify Program)</b>	
<b>Total Transfers</b>	

(a) Programs are reported in Schedule 1 and are excluded for the total conditional program grant revenue on the Statement of Revenues and Expenses.

**REGIONAL CONSORTIUM  
Financial Statements  
CERTIFICATION  
For the Year Ended August 31, 2007**

Updated

**CONSORTIUM NAME:** \_\_\_\_\_

I certify that to the best of my knowledge, the information provided in the attached statements, notes and schedules is correct.

\_\_\_\_\_  
(Signature) Chair of Consortium

\_\_\_\_\_  
(Signature) Financial Officer

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

**NOTES TO FORMS**

- Note 1** Management and Infrastructure grant from Alberta Education (total amount allocated for the year).
- Note 2** Registration rates are intended to cover the direct costs reported as programming expenses.
- Note 3** E.g. grants and subsidies from private partnerships (Shaw).
- Note 4** Funding from other provincial government departments or the Federal government; bank interest, and operational fees recovered from other consortia should be placed in this section as well.
- Note 5** Costs of operating and maintaining the consortium office.
- Note 6** Including Executive Director, Executive Assistant and office staff. Fixed overheads include office space, utilities, office supplies and equipment.
- Note 7** Including meeting fees, supplies, travel and subsistence and board development.
- Note 8** Program delivery costs include part-time staff and contracted coordinators/consultants(e.g. program host, presenters, registration staff), and other direct costs including materials, site, audio-visual, catering, etc. Do not include amounts transferred to other consortium shown on Schedule 2.
- Note 9** Amounts owed to the consortium at the end of the current year.
- Note 10** Unpaid balances pertaining to the year. E.g. Unpaid wages
- Note 11** Pertaining to programming planned for subsequent year(s).
- Note 12** Board-approved funds earmarked for future operations or programming.
- Note 13** Unrestricted Funds represent the net assets (total assets minus total liabilities) less any operational reserves for earmarked programming.
- Note 14** Accumulated Surplus is the total of operational reserves and unrestricted funds.
- Note 15** Any over-expenditure must be offset by sufficient Accumulated Surplus at the beginning of the year.

(a) Programs are reported In Schedule 1 and are excluded for the total conditional program grant revenue on the Statement of Revenues and Expenses.



NOTE: The terms listed in the Glossary of Terms are **bolded** throughout the text of the Funding Manual.

**ACCREDITED-FUNDED PRIVATE SCHOOL** means an accredited **private school** as defined in Section 28(2) of the *School Act* receives a grant under the *Learning Grants Regulation*.

**ACTIVITY PROGRAM** means a co-curricular activity outside of, but usually complimentary to, the regular curriculum and offering a high standard of professional training. This activity should be one requiring intensive training of the student.

**ALTERNATIVE FRENCH LANGUAGE PROGRAMS** means a program offered under Sections 11 and/or 21 (1)(a) of the *School Act* where French is used as the language of instruction.

- 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.

This is commonly referred to as French Immersion Programs.

**Revised ASSOCIATE BOARD** means the **resident board** or the willing non-resident board providing supervision of a **funded student's** home education program.

**AUDITION** for the purpose of funding means a trial performance in which an actor, singer, dancer or other performer demonstrates prowess in his or her abilities and the audition results are used to determine entry qualification.

**BLENDED PROGRAM** means an educational program consisting of two distinct parts:

- Revised**
1. A **school**-provided program where a teacher employed by a **school board** or **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*; and
  2. A Home Education Program that meets the requirements of the *Home Education Regulation*.

**BOARD** means the board of trustees of a **school jurisdiction**.

**CENTRE-BASED ECS PROGRAMMING** means the instructional program hours (based on **Individualized Program Plan** goals) provided to a **child with a severe disability/delay** in a classroom setting at a **school** or centre during a typical school year of September to June. Programming that is delivered to a **child with a severe disability/delay** primarily or exclusively in the home by a teacher assistant (under the direction of a certificated teacher) is also considered to be **centre-based ECS programming**. **Centre-based ECS programming** is often combined with **family-oriented programming** to provide a comprehensive program (see definition of **Family-Oriented Programming** in the Glossary of Terms).

**CHALLENGE ASSESSMENTS** for the purpose of claiming credit enrollment units (CEUs) are available for high **school** courses. Local **school authorities** may use **challenge assessments** to provide students with a means of receiving credits and a final mark for courses in which they already possess the knowledge, skills and attitudes identified in the program of studies and when this assessment is in the student's best interests.

**CHARTER BOARD** means 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** means a **school** established under Section 32 of the *School Act* and operated as per Section 34 of the *School Act*.

For the 2006-2007 school year, the following **charter schools** have been approved:

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

**CHILD(ren) WITH A DISABILITY/DELAY** means a **funded child(ren)** who is assessed and coded as having a mild, moderate or severe disability/delay.

**CHILD(ren) WITH A MILD OR MODERATE DISABILITY/DELAY** means a **funded child(ren)** who is assessed as having a mild or moderate cognitive disability, visual impairment, hearing impairment, emotional/behavioural disability, physical or medical disability, multiple disability, or communication delay.

**CHILD(ren) WITH A SEVERE DISABILITY/DELAY** – means **funded children** who have been identified as having a severe disability/delay according to the definitions and categories listed under the definition for **students with a severe disability**.

**CHILD(ren) WITH SPECIAL NEEDS** means a **funded child(ren)** who is assessed and coded as having a mild, moderate or severe disability/delay or who is gifted and talented. These children require an adapted or modified educational program to meet their exceptional needs. **The Individualized Program Plan (IPP)** provides documentation of the programming and is a mandatory requirement for any **child with special needs**.

**CLUSTERING** means the grouping of similarly coded **children with a severe disability/delay** 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 similarly coded **children with a severe disability/delay**. While **clustering** usually involves 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 a severe disability/delay** should be based on the educational needs of the children.

**Revised COUNT DATE** is used to determine eligibility for funding and refers to the specific date on which students and/or children should be counted. The **count date** is the last instructional school day of September. For the 2006-2007 school year the **count date** shall be September 29, 2006 and only those students/children enrolled on that date can be included in the count. If September 29 is a non-instructional day for a school authority, then the previous school day shall be used as the **count date**.

**DENSITY** is 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** is 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 PROGRAM** means an **ECS program** in which at least 70% of the **funded children** served have a severe disability/delay. **Updated ECS programs** with this designation may include **children with mild or moderate disabilities/delays** and/or regular ECS **funded children**, totaling a maximum of 30% of their ECS population. The following programs have been approved for this status for the 2006-2007 school year:

**School Jurisdictions**

- Black Gold Regional Division #18
- Calgary School District #19
- Edmonton School District #7
- Edmonton Catholic Separate School District #7
- Elk Island Public School Regional Division #14
- Grande Prairie School District #2357
- Greater St. Albert Catholic Regional Division #29
- Medicine Hat School District #76
- Medicine Hat Catholic Separate Regional Division #20
- Northern Lights School Division #69
- Parkland School Division #70
- Rocky View School Division #41
- Wetaskiwin Regional Division #11

**Schools**

- East Elementary Early Entry Program (3214)
- Ecole Bellevue (3201)
- James Short Memorial School (Early Development Centre) (9364)
- Beacon Heights School (7106)
- Elmwood School (7204)
- Evansdale School (7215)
- Glenrose Hospital (7701)
- Hazeldean School (7132)
- Homesteader School (7240)
- Mayfield School (7209)
- Scott Robertson (7171)
- Tevie Millar Heritage School (7772)
- Waverley School (7189)
- St. Gabriel School (Hand in Hand Education through experience) (8217)
- REACH Program
- Crystal Park Pre-School Program (1150)
- Vital Grandin School (2578)
- G. P. Vanier School (2570)
- Herold Pre-School (6849)
- Riverside School (6853)
- Elm Street School (6848)
- St. Louis Early Dev. Program (6872)
- Vera M. Welsh School (2704)
- Broxton Park School (2228)
- Preschool Intervention Program (PIP)
- Wetaskiwin Early Ed. Centre (WEEC)

**Designated ECS Programs at Private ECS Operators**

- \*Calgary Quest Children's Society (5398)
- Children's Services Centre – Red Deer (0289)
- 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 (formerly H.O.M.E.S.) (9887)
- New Heights Early Education Services (0432)
- PACE Kids (0302)
- Providence Child Development Centre
- \*Renfrew Educational Services
  - Renfrew – Centre (0249)
  - Renfrew – South (0250)
  - Renfrew – Bowness (0280)
  - Renfrew – Falconridge (0281)
  - Renfrew – Special Services (0437)
- Salvation Army Children's Village (0244)
- Society for the Treatment of Autism (0212)
- The Heartland Agency (0285)
- The PREP Program (0230)

*\*designated ECS program is at a Private School*

**Updated** **DESIGNATED SPECIAL EDUCATION PRIVATE SCHOOL (DSEPS)** is a private school given special approval and funding by Alberta Education where the sole purpose of the **school** is to serve students with identified special needs, and all students who are enrolled in the **school** are diagnosed with a mild, moderate, or severe disability. The educational programs provided to the students require modifications or adaptations to the *Program of Study*, and are specified in the **Individualized Program Plan (IPP)** developed and implemented for each student;

For the 2006/2007 school year the following **schools** are in this category:

- Calgary Quest Children's Society (9795)  
Calgary Quest School (5398)
- The Calgary Society for Effective Education of Learning Disabled (9131)  
Calgary Academy (9908)
- 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)
- Parkland Community Living and Supports Society (9027)  
Parkland School Special Education (4493)
- Renfrew Educational Services Society (9672)  
Renfrew – Centre (0249)
- Rundle College Society (9230)  
Rundle College Academy (5297)
- Third Academy International Ltd. (0023)  
The Third Academy – Calgary (0031)  
The Third Academy – Red Deer (0477)  
The Third Academy – Lethbridge (0522)

**DEVELOPMENTALLY IMMATURE** means an individual who is eligible to enter Grade one (based on the **school** entrance age policy of the **school jurisdiction**) and less than 7 years old on September 1, who is enrolled in an **ECS program** because the **parent** and the **school jurisdiction** agree that an **ECS program** is the most appropriate program for the child. In this situation the individual is counted as a **funded child**. If the individual is in a program that involves both ECS and Grade one instruction, he/she may be counted either as a **funded child** or as a **funded student**. A **developmentally immature** individual is not considered to have special needs and should not have been identified as having special needs in prior years. If the individual has special needs then the individual is counted as a **funded student**.

**DISTANCE** is the term used in Rural Transportation Block funding. **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** means 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** for funding purposes means a **board** or a **private ECS operator** that has been approved by Alberta Education to provide an **ECS program**.

**ECS HOME PROGRAM** means an **ECS program** (kindergarten) delivered by an **ECS operator** in the home of a regular ECS child (not one with special needs) who lives in a remote area where there is no ECS **school** program 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. The **ECS home program** must be approved by Alberta Education. 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 ECS programming**.

**EARLY CHILDHOOD SERVICES (ECS) PROGRAM** means an education program provided pursuant to Section 30 of the *School Act*.

**EDUCATIONAL SERVICES AGREEMENT** means an agreement or a portion of an agreement entered into by a **school jurisdiction** under Section 62 of the *School Act* to educate students under its authority on a full-time basis. Examples of this would be tuition agreements, sponsorship agreements, and **transportation agreements**.

**EFFECTIVE TRANSPORTATION AREA** for the purposes of Rural Transportation Block funding is the total area in square miles in a **school jurisdiction** including:

- any township 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
- the portion for transportation services provided by another **school jurisdiction** under a **transportation agreement**;

**ELIGIBLE PASSENGER** for purposes of Student Transportation funding refers to an individual who 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. An employee of the **school jurisdiction** accompanying a **student with a disability** or a **child with a disability/delay** in a program unit who is transported to and from **school**;
2. 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 **board** 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** or **private school** with which the **school jurisdiction** adjacent to the **unorganized territory** has an existing **transportation agreement**; and
  - f) resides at least 2.4 kilometers (by the most direct route on a **highway**) from the **school** that the individual has been directed to attend pursuant to Section 45(2) of the *School Act*; and
  - g) resides at least 2.4 kilometers (by the most direct route on a **highway**) from the **school** at which the individual is attending a language program complying with Section 11 of the *School Act*; or
  - h) resides in **unorganized territory** at least 2.4 kilometers (by the most direct route on a **highway**) from the **school** that individual attends;
3. A **student with a disability/delay** requiring transportation to and from **school** and who is unable to walk to **school** as the result of a disability/delay;

4. A **funded student** who is transported by horse drawn vehicle to the **school** which the student has been directed to attend; or
5. A **funded student** who resides within the boundaries of a **school jurisdiction** and attends a **private school** with which the **school jurisdiction** has an **education services agreement**.

**ELIGIBLE STUDENT** as defined in the Alberta School Foundation Fund (ASFF) Regulation (ASFF) means a student who:

1. On the **count date**, meets the requirement of Section 8(1)(b) of the *School Act*;
2. Either has a **parent** who ordinarily resides in Alberta or is an **independent student** who ordinarily 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 of the year which the student is counted;
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 a **First Nations student with status who lives on a reserve** pursuant to the *Indian Act* (Canada).

**ELIGIBLE TRANSPORTATION DISTANCE** for the purpose of Rural Transportation Block funding means the **distance** each **eligible passenger** resides from his or her **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 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 severe disabilities**, or is a **child with severe disabilities**.

**ELIGIBLE TRANSPORTED ECS CHILD** is a **funded child** who resides at least 2.4 kilometers from the **ECS program** and who is transported to the **ECS Program**. This distance limit does not apply to children who are funded through Special Transportation funding.

**EXPECTED ELIGIBLE PASSENGER** is a term used in Section 1.22 – Metro Urban Transportation funding and refers to the estimated number of **eligible passengers** calculated on the basis of enrollment and a number of factors which affect eligibility for transportation.

Revised

**FAMILY-ORIENTED PROGRAMMING** is an **ECS program** for **children with severe special needs** 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.

**Family-oriented programming** is not intended to be the only form of programming a child receives but rather is intended to enhance the child's **centre-based ECS programming** as outlined in his/her **IPP** (see definition of **Centre-Based ECS Programming** in the Glossary of Terms)

For funding purposes, **family-oriented programming** is claimed as sessions, where a session is defined as a minimum of 1.5 hours. A session involving more than one child and their **parent(s)** may be pro-rated based on the number of children and **parents** involved in the session and the length of session (minimum 45 minutes). Note: intervention provided by a member(s) of the child's learning team to the child must involve the **parent/caregiver** in order to be counted as an eligible **family-oriented programming** session. See the Program Unit Funding section of this Funding Manual for more details on how to properly count sessions and what conditions apply for this type of programming.

**FIRST NATIONS CHILD/STUDENT WHO RESIDES ON A RESERVE** is a child/student registered under the *Indian Act* who lives on a reserve. These children/students are funded by the Government of Canada even if they attend an Alberta school off reserve.

**FRANCISATION** means a program that assists students attending Francophone **schools** who do not have sufficient French language skills to succeed in **school**. Francisation programs are similar to ESL programs that assist students attending English-speaking **schools** who do not have sufficient English language skills to succeed in **school**.

**FRANCOPHONE EDUCATION PROGRAM** means a program operated by a **Francophone Regional authority** under Section 10 of the *School Act*.

**FRANCOPHONE REGIONAL AUTHORITY** means a Regional Authority for a Region established by the **Minister** under Section 255 of the *School Act*.

**FRENCH AS A SECOND LANGUAGE (FSL)** means a program or course offered under Sections 11 and 39 of the *School Act*

**FRENCH FIRST LANGUAGE (FRANCOPHONE) EDUCATION** means 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 STUDENT COUNT** is a snapshot of the **Funded Student** Count as of the **count date** as it stands on the last business day in May each year. This count includes any add/modify/deletes and cleared priority **school** conflicts that are processed by School Finance to the last business day in May each year.

**FUNDED CHILD** means an individual who:

- a) Is attending an **ECS program** on the **count date** of the current school year operated by a **school authority** or by the Government of Canada or any agency of the Government of Canada or the council of a band as defined in the *Indian Act (Canada)* or any agency established by a council or a band or councils of bands with which an Alberta **school jurisdiction** has an agreement under Section 62(2)(b) and (c) of the *School Act*; and
- b) Meets the minimum age requirements as set out in the following table\*:

Needs 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 (Maximum of 1 year funding)	4 years 6 months
ECS child with a mild or moderate disability/delay, or who is gifted and talented	Base Instruction and Mild/Moderate (Maximum 2 years funding)	3 years 6 months
ECS child with a severe disability/delay	Base Instruction and PUF (Maximum 3 years funding)	2 years 6 months
ECS child who is developmentally Immature	Base Instruction (Maximum 2 years funding)	5 years 6 months

**\*ECS operators** need to take into consideration the Grade one **school** entrance age in the community when enrolling children in an **ECS program**. **Children with severe disabilities/delays** will be funded for a maximum of three years while they are of ECS age. **Children with a mild or moderate** disability/delay and children who are gifted and talented will be funded for a maximum of two years while they are of ECS age. Regular **funded children** will be funded for a maximum of one year. Note: the maximum years of funding cannot be combined (i.e. 3 years PUF plus 1 year M/M, or 2 years M/M plus 1 year regular, etc); and

- c) Has a **parent** who ordinarily resides in Alberta on the **count date**; and

- d) Is a Canadian citizen on the **count date**; or
  - i) is lawfully admitted to Canada for permanent residence; or
  - ii) is a child of a Canadian citizen; or
  - iii) is a child of an individual who is lawfully admitted to Canada as a permanent or temporary resident

**Note:** This definition of a funded child does not include a **First Nations child who resides on a reserve**.

An individual who is at least 5 years 6 months but less than 6 years of age on September 1 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 program and if one of the following applies.

- a) The child has spent less than the number of years in the program for which they are eligible for funding, i.e. has received less than three years of Program Unit Funding (PUF),
- b) The child has not enrolled in an **Early Childhood Services (ECS) Program** prior to this age; or
- c) The child has been assessed as developmentally immature (Code 10)

An individual who is 6 years or older, but less than 7 years old on September 1, who is in an **ECS program** and who is **developmentally immature**, or who is a **funded child** entering an **ECS program** for the first time, is to be counted as a **funded child**. A **developmentally immature** individual is not considered to have special needs and should not have been identified as having special needs in prior years. If the individual has special needs then the individual is counted as a **funded student** for funding purposes.

**FUNDED STUDENT** means an individual who:

- 1. Is attending a **school** or a **blended program** in Grades 1 to 12 on the **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) in another province operated by a board of trustees or similar governing body of a publicly funded school or separate board or a person with which the Alberta **school jurisdiction** has an agreement under Section 62(1) or (2) of the *School Act* for the individual because he/she is a **resident student** of the **school jurisdiction** or a Charter Section 23 student represented by a **francophone regional authority**; or
  - c) operated by the Government of Canada or any agency of the Government of Canada or a council of a band as defined in the *Indian Act* (Canada) or any agency established by a council of a band or councils of bands with which the Alberta **school jurisdiction** has an agreement under Section 62(2)(b) or (c) of the *School Act* for the individual because he/she is a **resident student** of the **school jurisdiction**; or
  - d) in another province or country under a **reciprocal exchange program** approved by Alberta Education with a student from that respective province or country; and



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 of age and is eligible to enter Grade 1 according to the school entrance age policy of the **school jurisdiction** that enrolls the student, but less than 20 years of age; 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; or
3. Is a Canadian citizen on the **count date**; or
  - a) is lawfully admitted to Canada for permanent residence;
  - 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**; and
4. Has a **parent** who ordinarily resides in Alberta on the **count date** (*School Act*, Section 273), or is an **independent student** who ordinarily resides in Alberta on the **count date**; and
5. On the **count date** is not a **First Nations student who resides on a reserve** enrolled in a **school** operated by a **school jurisdiction** or the governing body of an **accredited-funded private school**; and
6. For funding purposes a **home education student** is not counted as a **funded student**.

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**GROUP HOME** means any home operated or approved by the government and includes a treatment (therapeutic and/or specialized foster care) foster home 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 by **group home** staff.

New

**HIGH SCHOOL REFUGEE STUDENT** means a high school age **funded student** who was born outside of Canada and has entered Canada as a refugee (as determined in the *Immigration and Refugee Protection Act* where a refugee is defined as someone who has been forced to flee their country due to persecution). These students will have had little or no formal schooling and are unable to complete many courses in the high school *Program of Studies*. Instead they are enrolled in a program that focuses on basic literacy, numeracy and functional skills to improve their chances of success in school and life to help them integrate into Canadian society.

**HIGHWAY** means 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 of the sidewalk) 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, as the case may be.

**HOME EDUCATION STUDENT** means an individual who:

1. Meets the requirements of the *Home Education Regulation*; and
2. Is under the supervision of a **school jurisdiction** or an **accredited-funded private school** and living in Alberta on the **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; and
4. Is a Canadian citizen; or
  - a) lawfully admitted to Canada for permanent residence;
  - b) a child of a Canadian citizen; or
  - c) a child of an individual who is lawfully admitted to Canada for permanent or temporary residence; and
5. Has a **parent** who ordinarily resides in Alberta, or is an **independent student** who ordinarily resides in Alberta; and
  - a) Is not counted by another **school jurisdiction** or **accredited-funded private school** for Base Instruction funding, or an **ECS operator** under the *Learning Grants Regulation*; and
  - b) Is taking a program in Grades 1 to 12 (ECS age children are not eligible).

**INDEPENDENT STUDENT** means a student under Section 1(1)(m) of the *School Act* 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 20 years of age on September 1; and
  - a) who is living independently; or,
  - b) who is a party to an agreement under Section 57.2 of the *Child, Youth and Family Enhancement Act*.

**INDIVIDUALIZED PROGRAM PLAN (IPP)** means a concise 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 needs, including mild, moderate, and severe disabilities/delays, and those who are gifted and talented.

The **IPPs** of students/children with special education needs includes:

1. Assessment data;
2. Current level of performance and achievement;
3. Identification of strengths and areas of need;
4. Measurable goals and objectives;
5. Procedures for evaluating student progress;
6. Identification of coordinated support services (including health-related), if required;
7. Relevant medical information;
8. Required classroom accommodations (e.g. any changes to instructional strategies, assessment procedures, materials, resources, facilities or equipment;
9. Transition plans; and
10. Year-end summary.

**IN THE CUSTODY OF A DIRECTOR** under the *Child, Youth and Family Enhancement Act* means a student who is in custody by agreement, or in temporary custody, or in permanent custody.

**INSTITUTION** means any secure residence prescribed by the **Minister** of Education as an **institution** and operated or approved by the government where staff are paid a salary to provide lodging and care on a 24 hour basis for the individuals in residence, and 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** attend the **school** program on site or in a facility for which the government department controlling the **institution** is legally responsible. **Resident students of the government** who reside in an **institution** have been placed there:

1. For medical treatment in a hospital or other treatment facility; or
2. Through a court order or agreement under the *Child, Youth and Family Enhancement Act*; or
3. For protection and/or care by:
  - a) Alberta Children's Services; or
  - b) Alberta Health and Wellness; or
  - c) Alberta Solicitor General; or
4. As residents of a women's shelter because of a situation where there is need for protection from physical, psychological or sexual abuse.

**Funded students** in an **institution** must be **resident students of the government** as defined in Section 44(7) of the *School Act*.

**SCHOOL AUTHORITIES APPROVED TO PROVIDE AN EDUCATIONAL PROGRAM IN AN  
Updated INSTITUTION for 2006-2007 (School Code)**

**Battle River RD No. 31**

Camrose Women's Shelter (4554)  
Camrose Community Connections (1319)

**Bosco Homes A Society for Children and Adolescents**

Columbus Academy (0577)  
Don Bosco Academy (3398)  
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)

**Chinook's Edge School Division**

Grimmon House (1058)

**Edmonton Catholic Sch. District No. 7**

AADAC Treatment Centre (1174)

**Edmonton School District No. 7**

CASA House (7713)  
Glenrose Hospital (7701)  
Highwood (Alberta Hospital) (7701)  
Howard House (7713)  
Kennedale YOC (7706)  
Kochee Mena (7713)  
Rite Trak (McMan) (7713)  
Rosecrest (7729)  
Royal Alexandra Hospital (7701)  
University of Alberta Hospital (7701)  
WIN House (7169)  
Yellowhead Youth Centre (7713)

**Elk Island PSD No. 14**

A Safe Place (3343)

**Foothills SD No. 38**

Stampede Ranch (5391)

**Fort McMurray Catholic No. 32**

Youth Treatment Centre (1871)

**Grande Prairie SD No. 2357**

Grande Prairie YOC (Bear Creek School)  
(1148)

**Holy Family CSRD No. 37**

St. Francis Holistic Education Centre (YAC)  
(1619)

**Lakeland RCSSD No. 150**

Dr. Margaret Savage Crisis Centre (2916)

**Lethbridge SD No. 51**

Harbour House (6459)  
Hospital Program (6453)  
Pitawani (6456)

**Medicine Hat School District No. 76**

Palliser Adolescent Services (6864)

**Northern Lights SD No. 69**

Lac La Biche YAC (2716)

**Parkland School Division No. 70**

Bright Bank Academy (1321)

**Peace Wapiti School Div No. 76**

Clairmont Group Home (1056)  
Rycroft School (1055)  
Sexsmith Group Home (1055)

**Red Deer School Dist No. 104**

Direwood Treatment Centre (4461)  
Oskayak Treatment Centre (4469)  
Parkland Youth Homes (4464)  
Red Deer Hospital Program (0574)  
Red Deer Youth Assessment Centre (4457)

**Sturgeon SD No. 24**

Oak Hill Boys Ranch (2509)

**Wild Rose School Division No. 66**

Kootenay School (4111)

**Wolf Creek RD No. 72**

Alberta Hospital Ponoka (4299)  
Twin Oaks (1040)

**MINISTER** means the **Minister** of Education.

**ON-LINE PROGRAM** is an educational program offered by a **school authority** and delivered electronically to a student at a **school** site or off-site, 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** means a day during which the **schools** of a **school jurisdiction** are scheduled to be open.

**OTHER LANGUAGE IMMERSION PROGRAMS** means 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** means a program offered by a **school** which provides a basic education developed 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 Policy 1.1.4. An **outreach program** must be offered in a stand-alone facility.

**PARENT** means, with respect to a student, the relevant individual under Section 1(2) of the *School Act* unless otherwise specified.

**PRIVATE EARLY CHILDHOOD SERVICES (ECS) OPERATOR** means 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 *Learning Grants Regulation* for the program.

**PRIVATE SCHOOL** means a **school** registered under Section 28 of the *School Act*.

**PUBLIC TRANSIT SYSTEM** refers to a bus or light rail system owned, operated or contracted by a city, town, village or hamlet which offers service to the public within its boundaries. Taxis and/or bussing systems designed for disabled individuals are not considered public transit.

**RECIPROCAL EXCHANGE PROGRAM** means a recognized program under which a student who is an Alberta **resident student** is partnered or paired with a student who is a resident of another province or country. The same **school authority** that sends the partnered Alberta **resident student** on the exchange must also receive the partnered student from another province or country either in the same school year or in the subsequent school year.

**RESIDENT BOARD** means the **board** of a **school jurisdiction** of which a student is a **resident student**.

**RESIDENT STUDENT** means 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** means a student as defined in Section 44(7) of the *School Act* who is entitled to have access to an education program.

**ROUTE DISTANCE** is a term used in conjunction with rural 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 or most direct route;
2. The **distance** from the point of the first afternoon pick-up by regular routing to the point of the last afternoon drop-off and back to the point of the first afternoon pick-up by the shortest or most direct route; and
3. The **distance** traveled 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**.

**RURAL DISTRICT** means a district or **division** that is not an **urban district**.

**SCHOOL** means a structured education environment through which an education program is offered to a student by:

1. A **board**;
2. A **charter school**;
3. A **private school**;
4. An **Early Childhood Services (ECS) private operator**;
5. A **parent** providing a home education program;
6. The **Minister**.

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

**SCHOOL AUTHORITY(IES)** for the purpose of this Manual includes **school jurisdictions**, **accredited-funded private schools**, and **private ECS operators**.

**SCHOOL BUILDING** means 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** means 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. Is without exemption 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 means 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.

**STUDENT WITH A DISABILITY** means a **funded student** who has been assessed and coded as having a mild, moderate or severe disability.

**STUDENT/CHILD WITH A SEVERE DISABILITY** means a **funded student/funded child** who has been identified as having a severe disability according to the following coding criteria:

#### **CATEGORIES OF SEVERE DISABILITIES/DELAYS FOR ECS TO GRADE 12**

##### **SEVERE COGNITIVE DISABILITY (Code 41)**

A **funded student/funded child** with a severe cognitive disability is one who:

- a) has severe delays in all or most areas of development;
- b) frequently has other disabilities including physical, sensory, medical and/or behavioural;
- c) requires constant assistance and/or supervision in all areas of functioning including daily living skills and may require assistive technology;
- d) should have a standardized assessment, which indicates functioning in the severe to profound range (standardized score of  $30 \pm 5$  or less). Functional assessments by a qualified professional will also be considered in cases where the disabilities of the person preclude standard assessments; and
- e) has scores equivalent to the severe to profound levels on an adaptive behavioural scale (e.g., AAMR Adaptive Behaviour Scales-School: Second Edition (ABS-S:2); Vineland Adaptive Behaviour Scales; Scales of Independent Behaviour-Revised).

**SEVERE EMOTIONAL/BEHAVIOURAL DISABILITY (Code 42)**

A **funded student/funded child** with a severe emotional/behavioural disorder is one who:

- a) displays chronic, extreme and pervasive behaviours which require close and constant adult supervision, high levels of structure, and other intensive support services in order to function in an educational setting. The behaviours significantly interfere with both the learning and safety of the student/ECS child and other students/ECS children. For example, the student/child could be dangerously aggressive and destructive (to self and/or others), violent and/or extremely compulsive; and
- b) (for Grade 1-12 students) has a diagnosis including conduct disorder, schizophrenia or bi-polar disorder, obsessive/compulsive disorders, or severe chronic clinical depression; and may display self-stimulation or self-injurious behaviour. In the most extreme and pervasive instances, severe Oppositional Defiant Disorder may qualify; or
- c) (for ECS children) has either a diagnosis or a statement by a qualified professional indicating that the child experiences severe emotional/behavioural difficulties.

A clinical diagnosis within the last 2 years of a severe emotional/behavioural disorder by a psychiatrist, registered psychologist or a developmental pediatrician is required, in addition to extensive documentation by **school authorities** on the nature, frequency and severity of the disorder. In the case of an ECS child who is not currently placed in a learning environment, extensive documentation of the nature, frequency, and severity of the disorder by the referring specialist may suffice. The effects of the disability on the student's/ECS child's functioning in an education setting must be described. An ongoing treatment plan/behaviour plan should be available and efforts should be made to ensure that the student/ECS child has access to appropriate mental health and therapeutic services.

A clinical diagnosis of a severe emotional/behavioural disorder is not necessarily sufficient to qualify under this category. Some diagnoses with behavioural components that are not sufficient to qualify are: Attention-Deficit/Hyperactivity Disorder (AD/HD), Attention Deficit Disorder (ADD).

**SEVERE MULTIPLE DISABILITY (Code 43)**

A **funded student/funded child** with multiple disabilities is one who:

- a) has two or more non-associated moderate to severe cognitive and/or physical disabilities which, in combination, result in the student functioning at a severe to profound level; and
- b) requires significant special programs, resources and/or therapeutic services.



**Students/ECS children with a severe disability** and another associated disability should be identified under the category of the primary severe disability. For example:

- A student/ECS child with a severe cognitive disability and another associated disability is not designated under this category, but is designated under severe cognitive disability.
- A student/ECS child with a severe emotional/behavioural disability and another associated disability is not designated under this category, but is designated under severe emotional/behavioural disability.

The following mild or moderate disabilities cannot be used in combination with other disabilities to qualify under Code 43:

- a) Attention Deficit/Hyperactivity Disorder (AD/HD)  
Attention Deficit Disorder (ADD) (ECS – Grade. 12)
- b) Emotional/Behavioural Disabilities (ECS – Grade. 12)
- c) Learning Disability (Grades 1 – 12 only)
- d) Speech and Language Related Delays (ECS – Grade 12)

NOTE: ECS children diagnosed with Down Syndrome in the most severe cases should be reported under Severe Multiple Disability (Code 43).

### ***SEVERE PHYSICAL OR MEDICAL DISABILITY – including Autism (Code 44)***

A **funded student/funded child** with a severe physical, medical or neurological disability is one who:

- a) has a medical diagnosis of a physical disability, specific neurological disorder or medical condition which creates a significant impact on the student's/ECS child's ability to function in the **school** environment (note: some physical or medical disabilities have little or no impact upon the student's/ECS child's ability to function in the **school** environment); and
- b) requires extensive adult assistance and modifications to the education environment in order to benefit from schooling.

### **Revised**

A student/ECS child with severe autism or other severe Pervasive Developmental Disorder is included in this category. A clinical diagnosis by a psychiatrist, registered psychologist, or medical professional specializing in the field of autism is required. A clinical diagnosis of autism is not necessarily sufficient to qualify under this category. Eligibility is determined by the functioning level of the student/ECS child with autism.

In order for a diagnosis of autism to be made, the student/ECS child needs to demonstrate impairment in the following areas:

- Social interaction; and
- Communication; and
- Stereotyped pattern of behaviour (i.e. hand flapping, body rocking, echolalia, insistence on sameness and resistance to change).

A student/ECS child diagnosed with severe Fetal Alcohol Spectrum Disorder (FASD) may have Fetal Alcohol Syndrome (FAS) or Alcohol-Related Neurodevelopmental Disorder (ARND) and is included in this category (Code 44 – Severe Physical or Medical Disability – Including Autism). A clinical diagnosis by a psychiatrist, registered psychologist with specialized training, or medical professional specializing in developmental disorder is required. A clinical diagnosis of FASD is not necessarily sufficient to qualify under this category. Eligibility is determined by the functioning level of the student with FASD. Students/ECS children with severe FASD who exhibit significant impairment in the areas of social functioning, life skills, behaviour, learning, attention and concentration, will need extensive intervention and support.

### ***DEAFNESS (Code 45)***

A **funded student/funded child** with a profound hearing loss is one who:

- a) has a hearing loss of 71 decibels (dB) or greater unaided in the better ear over the normal speech range (500 to 4000 hertz (Hz)) which interferes with the use of oral language as the primary form of communication, or has a cochlear implant; and
- b) requires extensive modification and specialized educational supports; and
- c) has a diagnosis by a clinical or educational audiologist. New approvals require an audiogram within the past 3 years.

If a student/ECS child has a severe to profound sensori-neural hearing loss that has not changed significantly since the initial approval by Alberta Education, documentation from a qualified specialist in the field of deafness outlining the severity of the hearing loss and modifications to the learning environment may be sufficient to support eligibility.

### ***BLINDNESS (Code 46)***

A **funded student/funded child** with severe vision impairment is one who:

- a) Has corrected vision so limited that it is inadequate for most or all instructional situations, and information must be presented through other means; and
- b) Has visual acuity ranging from 6/60 (20/200) in the better eye after correction, to having no usable vision or field of vision reduced to an angle of 20 degrees.

If a student/ECS child has a severe to profound visual impairment that has not changed significantly since the initial approval by Alberta Education, documentation from a qualified specialist in the field of vision outlining the severity of the disability and modifications to the learning environment may be sufficient to support eligibility.

For those students/ECS children who may be difficult to assess (e.g. cortical blindness – developmentally delayed), a functional visual assessment by a qualified specialist in the field of vision or a medical professional may be sufficient to support eligibility.

**SEVERE DELAY INVOLVING LANGUAGE (Code 47) – For ECS children only.**

A **funded child** with a severe delay involving language is one who has difficulty communicating with peers and/or adults because of a severe delay in expressive, receptive or overall language. The following criteria determine eligibility in this category:

- a) a child who has sufficient communicative ability to permit formal speech/language assessment should demonstrate results less than or equal to the first percentile in expressive, receptive or total language. If formal language assessment is not possible, a parental report and/or observational measure may be used; or
- b) a child who has severe phonological delay and at least a moderate delay in expressive, receptive or overall language (on a formal assessment of language); or
- c) a child who has at least a moderate to severe delay in expressive, receptive or overall language delay (on a formal assessment of language) and at least a moderate to severe delay in one or more of the following areas of development: fine motor, gross motor, vision, hearing.

Alberta Education criteria for a severe delay involving language are based on a child's developmental profile, not on individual subtest scores in any single area of development. Eligibility documentation must include an assessment completed by a Speech and Language Pathologist that includes the results of measures used and a description of the child's communicative ability. In order to qualify, the language delays must have a significant impact on areas such as: functional language, social use of language, vocabulary, language concepts, mean length of utterance, grammar and acquisition of early literacy. If the child qualifies on the basis of a language delay in combination with delays in other areas, those areas of delay must be assessed by an appropriate specialist and must result in a significant impact on the child's ability to function in an ECS environment.

Assessment reports that were completed within six months of the day the child begins his/her program must be submitted to the Special Programs Branch for pre-approval of the child's eligibility or with the PUF application.

Clustering must be the first option considered when planning programming for these children. In most cases a 475-hour program is sufficient.

Children with moderate to severe delays in two or more non-associated areas (not including language) should be considered under Severe Multiple Disability (Code 43).

**STUDENT WITH SPECIAL NEEDS** means a **funded student** who is assessed and coded as having a mild, moderate or severe disability or who is gifted and talented. 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 needs.

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

- a) has been issued a student 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 duration.
- b) has been issued an employment authorization to work temporarily in Canada (i.e., a temporary foreign worker); or
- c) has filed a refugee claim to the Immigration and Refugee Board (IRB) within the past year (i.e., a refugee claimant); or
- d) has been issued a federal Temporary Resident Permit; or
- e) has diplomatic status in Canada.

A **funded child** whose **parent(s)** fit the definition of a **temporary resident**, as it relates to the *School Act*, is eligible to access basic education at no cost. The **parent** shall not be required to pay foreign student tuition fees. In all other cases the **parent** may be required to pay foreign student fees at the discretion of the school **board**.

**Temporary residents** does not include:

- a) Visitors/tourists to Canada, with or without a valid visitor's visa; or
- b) Individuals in Canada with study permits who are not registered in either:
  - 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 in duration.
- c) Individuals who are registered in a preparatory program as a precondition to entering a full-time diploma or degree program; or
- d) Individuals who register in a diploma or degree program offered as part of a continuing education program of study; or
- e) Individuals who are registered in an English as a Second Language (ESL) program; or
- f) Individuals in Canada for six months or less for the purpose of academic study or training.

Students of **school** age who are in Canada on a study permit are considered Foreign Students and do not qualify for Alberta Education funding.

See also definition of **Funded Student** (glossary) and Section 8 of the *School Act*.

**TRANSPORTATION AGREEMENT** means an agreement or a portion of an agreement entered into by a **school jurisdiction** under Section 62 of the *School Act* to transport students under its authority to a **school**.

**UNORGANIZED TERRITORY** means any area in Alberta that is not included within a district, a **division**, or a regional **division**.

**URBAN DISTRICT** means:

1. A city district which is not included in a school **division** or regional **division**; and
2. A district, **division** or regional **division**, or portion thereof, designated by the **Minister** as an **urban district**.

**WEIGHTING FACTOR** is a term used in conjunction with rural transportation and means, for the purposes of Block Funding, that:

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 **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; and
5. Each **eligible passenger** who requires a wheelchair is multiplied by 8.0.

## **POLICY**

When funding has been provided by Alberta Education to a **private ECS operator**, and the **private ECS operator** ceases operations, any surplus funds shall be returned to the Minister of Finance or be provided to another operator of an approved **Early Childhood Services (ECS) program**.

## **CONDITIONS**

1. An **ECS operator**, who chooses to go into recess, may not do so for more than one school year before making a final decision on ceasing or resuming operations.
2. The final decision to cease operations must have been reached by the members of the society governing the ECS operations, at a general meeting called within the provision of the society's by-laws. This decision should be communicated to the respective Zone Services Branch as soon as possible.
3. If an **ECS operator** decides not to continue providing a program, the operator may determine if another **ECS operator** is willing to take over the program.

If another **ECS operator** in the community agrees to take over the program and to accept the transfer of assets and liabilities, including operating and capital surpluses, that new operator must acknowledge receipt of this transfer and agree not to claim a capital grant. Written acknowledgement of an agreement to these terms must be sent to the School Finance Branch, Alberta Education, with a copy to the appropriate Zone Services Branch.

4. If an **ECS operator** does not transfer its assets to another **ECS operator**, Alberta Education will determine the amount of surplus from operations to be returned to the Minister of Finance.

## **PROCEDURES**

1. When an **ECS operator** has made a decision to cease operations, a letter must be sent to the School Finance Branch, Alberta Education notifying them of their decision, with a copy to the appropriate Zone Services Branch. The letter must also include a copy of the **board** motion to cease operations, made at a duly called meeting of the **board**.
2. Both parties must sign an agreement/contract for the transfer of the **ECS operator's** assets and liabilities to the other **ECS operator** and submit the document to the Financial Reporting and Accountability Branch, Alberta Education by November 30 of the year in which the operator ceased operations.

- Revised**
3. An Audited Financial Statement (AFS) must be prepared for the final year of operation or portion thereof and submitted to the Financial Reporting and Accountability Branch, Alberta Education by November 30 following the school year that operations ceased.
  4. Prepare an inventory schedule of all assets/liabilities transferred on the date operations ceased and have it signed by officials of the **ECS operator** accepting the transfer.
  5. Notify Alberta Government Services, Corporate Registry if the society will be dissolved on the specified date.
- Revised**
6. In the school year an operator decided to cease operations, unexpended fees paid by **parents** in that school year may be returned to the same **parents** from the operating surplus of that school year.
  7. When the **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.
  8. The disposition of the operating surplus and capital assets not returned to Alberta Education should be approved at a meeting of the society members of the operator ceasing operations.

- 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 instalments and prescribing the time or times when the lump sum or the instalments 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.

## **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 1/200<sup>th</sup> 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 1/200<sup>th</sup> 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 **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**.