

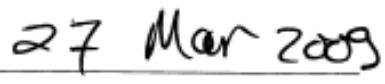
FUNDING MANUAL FOR SCHOOL AUTHORITIES 2009/2010 SCHOOL YEAR

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
- *Education Grants Regulation*



Deputy Minister of Education



Date

April 7, 2009

Message from the Deputy Minister

I am pleased to provide you with Alberta Education's *Funding Manual for School Authorities* for the 2009/2010 school year.

The *Manual* will assist school jurisdictions, charter schools, accredited funded private schools and private ECS operators in accessing and understanding Alberta Education funding. The *Manual* provides details on the funding available for the 2009/2010 school year including applicable formulas, rates, criteria and reporting requirements. Funding from Alberta Education supports the provision of approved education programs for students and children in ECS to Grade 12.

The Summary of Significant Changes highlights important funding changes for 2009/2010. Any questions may be directed to the appropriate contact listed in section 9.

Please accept my best wishes for a successful school year in 2009/2010

Sincerely,

A handwritten signature in black ink, appearing to read 'Keray Henke', written in a cursive style.

Keray Henke
Deputy Minister

SUMMARY OF SIGNIFICANT CHANGES FUNDING MANUAL FOR SCHOOL AUTHORITIES 2009/2010 SCHOOL YEAR

The following is a list of significant content changes that have been made to the *2009/2010 Funding Manual for School Authorities*. Some of these changes may not apply to all school authority types.

Introduction: (Pages 10 & 11)

A school jurisdiction that submits Audited Financial Statements for the previous school year showing an Accumulated Operating Deficit (AOD) must submit a Deficit Elimination Plan for approval by the Minister by February 28 of the current school year.

Part 1: Funding for School Jurisdictions, Francophone Regional Authorities, and Charter Schools.

Section 1.3 – Outreach funding (Page 21)

The Application to Operate a New Outreach Program can now be found in the *Outreach Programs Handbook (2009)*. The form is no longer in the *Funding Manual*.

Sections 1.32 and 1.33– ECS Regular and Special Transportation Funding (Page 60)

If the transportation of an ECS funded child is not done by the private ECS operator, then a contract or signed agreement must be in place by November 30 with the company or person transporting the child.

Part 6: Other Provincial Support

Section 6.1– Education Programs in Institutions (EPI's) Funding (Page 81)

A Designated First Nations Agency (DFNA) Chief Executive Officer is recognized under the *Child, Youth and Family Enhancement Act* and may place resident students of the government in an Institution

Part 8: Payments to School Authorities

Sections 8.1, 8.2, and 8.3 – Funding Rates (Pages 89-94)

Alberta Education's funding rates are increased as follows per the Budget 2009 announcement:

- Base Instruction and Class Size funding rates are increased by 4.8%.
- Transportation and Plant Operations and Maintenance Rates are increased by 3 %
- Severe Disabilities, Stabilization, SuperNet, CTS Evergreening, Innovative Classrooms and Portable Classrooms funding rates remain the same.
- Other funding rates and allocations are increased by 1%.

Section 8.4 – Payment Schedules (Page 96)

Infrastructure, Maintenance, and Renewal payments will be allocated 45% in September, 45% prior to April 30, 2010, and 10% upon submission of statements of final costs.

Glossary of Terms (Page 145 to 161)

New definitions have been added to the Glossary for the following terms:

- Board
- March Count Date
- September Count Date

Forms: the following new forms have been added:

- Form 09AE6.6 Fort McMurray Allowance FTE Calculation
- Form 09AE6.7 Report on CTS Equipment Evergreening Costs

Any questions regarding these changes may be directed to Brad Smith, Mark Lalumiere or Mary-Ellen Deising at 780-427-2055.

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¹Accredited Funded Private Schools and Private ECS Operators where applicable.

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FOREWORD

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

GENERAL CONDITIONS

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

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

5. The reference documents listed in Section 9.4 of this Manual should be used by **school authorities** as companion documents to the *Funding Manual for School Authorities*. They should not be used exclusive of each other.
6. **School authorities** applying for funding shall keep on file, for seven years, the documents required to support their claim for each type of funding described in this Manual, including invoices. The following are examples of other information to be kept on file:
 - a) an eligible enrolment count as of the **count date** for the **school year**;
 - b) copies of current **educational service agreements** including **transportation agreements**;
 - c) a record of the daily attendance of each enrolled student including high school students, the master timetable and student timetables and documents listed in Section 1.2;
 - d) a list of **schools**, teachers and administrators involved in each program.
 - e) documentation supporting a student's eligibility as a **funded student/funded child**.
 - f) where applicable, documentation supporting a student's eligibility for funding as a child of a **temporary resident**
7. Alberta Education reserves the right to request and inspect documentation to substantiate data submitted that determines funding allocations and that assists in conducting financial and other reviews. This document inspection may be conducted off-site or on-site in a **school authority**.
8. An adjustment may be made to a payment when a review or audit by Alberta Education indicates that:
 - a) a **school authority** has received funding to which it was not entitled (pursuant to Section 9(1) of the *Education Grants Regulation*) – Note: no limitation period; 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. For those **private ECS operators** who are required to complete the Audited Financial Statements or the Budget Report, January and subsequent payments shall be withheld until the documents have been submitted and determined to be acceptable by the Financial Reporting and Accountability Branch.
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. **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 (see Section 9.5).
12. 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.
13. 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**.

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14. November 30 is the deadline for **school jurisdictions** to submit Audited Financial Statements (AFS) for the previous school year. A **school jurisdiction** submitting an AFS with an accumulated operating deficit (AOD) is expected to work with Alberta Education to eliminate the AOD 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**. The Deficit Elimination Plan must be submitted to Alberta Education by February 28.

LIMITATIONS

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

1. The maximum expenditure for system administration and **school board** governance will range from 4.0 and 6.0% depending on the student enrolment of the **school jurisdiction**. To determine the maximum expenditure the applicable percentage is applied to a **school jurisdiction's** total expenditures as outlined in the Guidelines published by the Financial Reporting and Accountability Branch.
2. Funding provided to support ECS to Grade 12 programs cannot be used to support courses, programs or training for adults (20 years and older).
3. Targeted Funding for Provincial Initiatives is allocated for specific priority programs as determined by Alberta Education, and are included in Part 5 of this manual.
4. Funding for capital needs is allocated to **school jurisdictions** based on priorities and formulas determined by Alberta Education. For the 2009/2010 **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.
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, Educational Programs in **Institutions** Funding, Regional Educational Consulting Services Funding, Program Unit Funding, Learning Resources Credit Allocation, Regional Consortium Funding, and Debt Retirement.

ALLOCATION CATEGORIES

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

1. Base Instruction Funding
 - is provided on a per student basis for every full-time equivalent (**FTE**) student from Early Childhood Services (ECS) to Grade 9. For students in Grades 10 – 12, Base Instruction funding is provided based on Credit Enrolment Units (**CEUs**).
2. Additional Funding for Differential Factors
 - is based on distribution formulas designed to address variable cost factors.
 - specific identified student populations include:
 - Early Childhood Services children with mild/moderate disabilities and those who are gifted and talented;
 - **Children/Students with severe disabilities/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 funding 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:
 - small schools by necessity;
 - geographical **distance** between **school jurisdiction** central office and schools;
 - year to year enrolment fluctuations;
 - administration costs for **school jurisdictions** with small enrolments;
 - 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 Grades 1 – 9 schools;
 - support for Hutterite colony schools;
 - support for francophone students to have equivalent access to programs.
- 3. Targeted Funding for Provincial Initiatives
 - must be used for the purpose it was allocated, such as Student Health Partnerships, Alberta Initiative for School Improvement, and Class Size Initiative.
- 4. Other Provincial Support
 - is provided in addition to the funding identified above and covers such areas as Regional Educational Consulting Services, Institutional Programs, The Learning Resources Credit Allocation, Regional Consortium, Debt Retirement and the Fort McMurray Allowance.
- 5. Capital Funding
 - is provided for preservation of a current school facility, or construction of a new school facility. This funding may only be used for the purpose it was intended.

REVENUE SOURCES FOR SCHOOL JURISDICTION FUNDING

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

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

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

2. The General Revenue Fund (GRF) provides grants authorized by the **Minister**.

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

Payment from ASFF

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

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

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

MANUAL FORMAT

A list of major changes is provided in the accompanying document: *Summary of Significant Changes for 2009/2010*.

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

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

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

Other Parts of the Manual Include:

Part 8: Payments to School Authorities

This section identifies funding rates and payment schedules.

Part 9: Additional Information, Reporting Requirements

The following information is included in this section

- Information and Reporting Requirements
- Contact List
- References
- Recessing or Ceasing of Operations by a **Private ECS Operator**
- Government Organization Act
- Withdrawal of Teacher Services or Lockout

Forms

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

Glossary of Terms

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

PART I — FUNDING¹ FOR SCHOOL JURISDICTIONS, FRANCOPHONE REGIONAL AUTHORITIES, AND CHARTER SCHOOLS

BASE ALLOCATIONS

Section 1.1 — ECS Base Instruction

ALLOCATION FORMULA

ECS Base Instruction Allocation	=	# of funded children	X	Applicable ECS Instruction Rate (see Section 8.1 or Section 8.2)
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ALLOCATION CRITERIA

- Access to at least 475 hours of ECS instruction must be provided.
Exceptions:
a) ECS mild/moderate, gifted or talented see Section 1.5.
b) **Children with severe disabilities/delays** see Section 1.6.
- A child referred to in Section 30(1)(a) of the *School Act* is not a resident or non-resident student of a **board**, therefore, an approved **ECS operator** must be prepared to accept and organize programming for all **funded children** for whom programming is requested, including **children with special needs**.
- A **funded child** can only be claimed for funding by one **ECS operator** per year.
- ECS operators** are eligible for one year of ECS Base Instruction funding for regular ECS **funded children**, who are at least 4 years 6 months of age and less than 6 years of age on September 1.
- ECS operators** may only charge a fee to **parents** of **funded children** in a basic 475-hour program to offset non-instructional costs such as supplies, snacks and field trips.
- ECS operators** that offer an **ECS program** with more than 475 hours may charge a reasonable fee to cover the cost of the additional instructional hours.
- An individual who is at least 5 years 6 months but less than 6 years of age on September 1, and who is either coded severe or mild/moderate, may be counted as a **funded child** (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 the child has spent less than the number of years in the program for which they are eligible.

¹ Accredited Funded Private Schools and Private ECS Operators as applicable.

8. An individual who is at least 5 years 6 months, but less than 7 years old on September 1 may be counted as a **funded child** (rather than a **funded student**) if they are enrolled in an **ECS program** and are either:
 - a) **developmentally immature**, or
 - b) a **funded child** entering an **ECS program** for the first time.
9. When a **funded child** (not a **child with special education needs**) lives in a remote area and there is no ECS program offered in a **school** within a reasonable transportation **distance**, the **school jurisdiction** may provide an **ECS home program**. A certificated teacher must plan, deliver and evaluate the program and the program must have at least twenty-two visits to the family home for a minimum of 1.5 hours each -considered equivalent to a basic 475-hour kindergarten program. The frequency, setting and structure of an **ECS home program** must be determined in consultation with **parents**. An **ECS home program** is not a home-education kindergarten program and it is not **family-oriented ECS programming**.

FEES AND DEDUCTIONS

Portable Classroom Rental Fee:

Alberta Education will deduct from the funding amount due to an ECS Operator 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 15th day of the month or ends on or after the 15th day of the month.

Subject to Ministerial approval, an ECS Operator 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.

REVISED REFERENCES

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

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

[Kindergarten Program Statement Revised September 2008](#)

[ECS Special Education Handbook: 2009/2010 School Year](#)

See Reporting Requirements, Section 9.1 of this Manual

Section 1.2 —Base Instruction (Grades 1 – 12)

ALLOCATION FORMULA: Base Instruction

1. Grades 1 – 9

# of funded students in Grades 1 to 9	X	Applicable Base Instruction Rate (see Section 8.1 or Section 8.3)
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2. Grades 10 – 12

a)	# of CEUs completed by Funded Students (max. 60 per year)	X	CEU Rate
b)	# of students with special education needs (Grant code 500 or 550)	X	35 CEUs X CEU Rate

ALLOCATION CRITERIA

- School authorities** 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. (Exception 8 (b) this section).
- All individuals who are at least 5 years, 6 months of age but less than 20 years old on September 1 may be eligible for this funding. See definition of **funded student** and **funded child** in the Glossary of Terms.
- Under no circumstances can an individual be counted as both a **funded student** and as a **funded child** in the same **school year**.
- 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 #8 of this section.
- The Superintendent and Secretary-Treasurer of **school jurisdictions** are required to sign and submit to School Finance a **Declaration of Management** (form 09AE1.2d) on an annual basis.
- Funding may be provided to the **resident school board** of a **funded student** who attends school in another **school authority** with which their **resident school board** has an education services agreement. The agreement must be submitted to the School Finance Branch by November 15 for review and funding approval.
- A student may be funded for an academic program associated with an activity program offered outside of Alberta (but in Canada) if:
 - the student meets the criteria of a **funded student**; and
 - the activity program is not offered in Alberta; and
 - the student was selected by **audition** or another substantive selection method to be part of the program; and
 - a signed **educational services agreement** has been submitted to School Finance Branch by November 15.

8. Funding for Eligible Students in Grades 10 to 12

- a) funding is provided on a **credit enrolment unit (CEU)** basis for senior high school courses as follows:
 - Credit Value 1 = 1 **CEU**,
 - Credit Value 3 = 2.5 **CEUs**,
 - Credit Value 5 = 5 **CEUs**.
- 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;

(Registered Apprenticeship Program, and Special Projects courses are exceptions to these rules – see the *Guide to Education* for more details).
- c) funding is provided to a maximum of 60 **CEUs** per student per year (September – August).
- d) funding is provided for Alberta **Distance Learning (ADL)** courses paid by a **school authority** for students whose marks are reported by the ADLC.
- e) funding is provided for off-campus education programs, and other credit courses involving substantial off-campus instruction (see *Guide to Education*).
- f) Knowledge and Employability (K&E) course credits completed and credits completed for any remaining Integrated Occupational (IO) courses will be funded at 8/5 times the **CEU** rate.
- g) **UPDATED** **REVISED** ESL students registered on the **September count date** who are coded as 301 or 303 and enrolled in at least one of the following ESL courses: ESL 1120, 1121, 1122, 1123 or 1125, will be funded at the rate of 17.5 **CEUs** per student per semester of ESL courses taken. No additional funding is provided for other courses completed during these semesters. ESL Students taking courses during the summer **term** will be funded on a **CEU** basis.
- h) funding is provided for credits granted through **challenge assessments** at 20 per cent of the **CEU** value for the course(s) challenged. Funding will not be provided for challenge assessments and course completion for the same subject in the same semester.
- i) funding based on 35 **CEUs** is provided for **high school refugee students** (code 640) who 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.

High school refugee students enrolled in Home Education Programs, **Blended Programs**, **Outreach Programs** or **On-Line Programs** are not eligible for this funding.
- j) 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.
- k) funding is provided for Alberta **funded students** enrolled with a Lloydminster school **division** high school on the **September count date**.
- l) funding is provided for senior high school students who take a junior high course for 125 hours; the equivalent of 5 **CEUs** will be funded for each course completed (Form09AE1.2a).
- m) additional funding will be provided for credits completed in the summer for high school students identified with the 500 grants code.
- n) 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.

9. Criteria for Funding High School Courses:

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

10. 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).

11. CEU Funding Recovery Schedule

- a) a 10 per cent funding recovery will be applied for the following violations to access to minimum number of instructional hours:
 - 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 enrolments where it is determined that it is not reasonable or even possible for a large number of students to have access to 25 hours of instruction per credit.
- iv. where a high school student does not have access to at least 1000 hours of instruction.
- b) a 100 per cent funding recovery will be applied when:
 - i. courses taught did not follow the *Programs of Study*.
 - ii. a school that has been assessed a penalty previously, continues to be non-compliant.
 - iii. courses have both access to instruction and Program of Studies contraventions.
- c) a 75 per cent funding recovery will be applied when:
 - Special Projects do not meet the programming requirements set out in the *Guide to Education: ECS to Grade 12*.

FEES AND DEDUCTIONS

1. *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 authorities**. The costs of the license, plus GST, are recovered from **school authorities** 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.

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

Alberta Education will forward the maintenance fee of \$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 **school board**.

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

References

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

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

Section 1.3 — Outreach

ALLOCATION FORMULA

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

1. Outreach Funding is subject to Alberta Education's approval of the **Outreach Program** by Zone Services Branch by March 31 of the prior year.
2. Students taking courses in an **Outreach Program** are funded under Section 1.2 Base Instruction of this Manual.
3. Students in an **Outreach Program** may also complete courses in other programs or **schools**.
4. The *Outreach Programs Handbook* provides assistance in developing an outreach application.
- NEW** 5. The Application to Operate a New Outreach Program can be found in the *Outreach Programs Handbook*.

REFERENCES

[Alberta Education Programs of Study](#)

[Guide to Education ECS to Grade 12 \(2009\)](#)

[Outreach Programs Handbook \(2009\)](#)

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

Section 1.4 — Home Education

ALLOCATION FORMULA

1. Home Education

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

2. **Blended Program** Grades 1 to 9

$$\begin{aligned} &\text{Blended Program Allocation for Each Funded Student} = \left(\begin{array}{ccc} \text{\% of the Home Education Program} & \times & \text{Home Education Rate} \end{array} \right) \\ &\text{PLUS} \\ &\text{The \% of school programs (min. 50\%)} \times \text{Base Instruction Rate} \\ &\text{PLUS} \\ &\text{The ADL course cost that exceeds 50 per cent of the Home Education rate the } \textbf{associate board} \text{ or } \textbf{associate accredited funded private school} \text{ provides to the home education } \textbf{parents} \text{ (Up to a maximum of the student's pro-rated Home Education funding amount).} \end{aligned}$$

3. **Blended Program** Grades 10 to 12

$$\begin{aligned} &\text{Blended Program Allocation for Each Funded Student} = \left(\begin{array}{ccc} \text{\% of Home Education Program} & \times & \text{Home Education Rate} \end{array} \right) \\ &\text{PLUS the lesser of:} \\ &\quad \text{a) } \begin{array}{ccc} \text{The \% of the school program (min. 20 per cent)} & \times & \text{Base Instruction Rate} \end{array} \\ &\quad \text{or} \\ &\quad \text{b) } \begin{array}{ccc} \text{CEUs earned} & \times & \text{The CEU rate (for students taking high school courses)} \end{array} \\ &\text{PLUS 50 per cent of the eligible ADL course costs up to a maximum of the student's pro-rated Home Education Funding amount.} \end{aligned}$$

ALLOCATION CRITERIA

UPDATED

1. The education programs for these students must be consistent with the student learning outcomes described in the *Alberta Programs of Study* or stated in the schedule attached to the *Home Education Regulation*, and be supervised by an **associate board** or **associate accredited funded private school**.
2. An **associate board** or **associate accredited funded private school** must offer to the **parent** of a **home education student** not less than 50 per cent of the Home Education instruction funding for the purchase of instructional materials. Funding must be provided to the parent(s) in the year in which it is allocated and cannot be carried over.
3. For a **home education student** enrolled by the **associate board** or **associate accredited funded private school** in ADL courses at the ADLC at the **parents'** direction, the **school board** may use some or all of the **parent's** 50 per cent funding to pay for the cost of these courses and required instructional materials. The **associate board** or **associate accredited funded private school** may claim costs for ADL courses that exceed the **parent's** 50 per cent funding.
4. For **home education students** in Grades 7 to 12 enrolled by the **associate board** or **associate accredited funded private school** in Alberta **Distance Learning (ADL)** courses at the Alberta **Distance Learning Centre (ADLC)**, the funding provides for 50 per cent of the cost of the ADLC course costs to a maximum equivalent of the Home Education instructional funding amount. This funding may be claimed on Form 09AE1.4a.
5. When a **home education student** in grades 7 to 12, who is taking ADL courses through the ADLC, moves from one **associate board** or **associate accredited funded private school** to another after the **September count date**, and the receiving **associate board** or **associate accredited funded private school** also enrolls the student in ADL courses through the ADLC; Alberta Education will

pay 50 per cent of the eligible ADL course costs combined for both **associate boards** –up to a maximum equivalent to the Home Education funding amount.

6. **Home education students** and their **parents** must reside in Alberta on the **September count date** of the current **school year**.
7. **Home education students** in **accredited funded private schools** are not eligible for Severe Disabilities funding.

REFERENCES

[Home Education Regulation - Alberta Regulation 145/2006 School Act](#)

[Home Education Notification Form](#)

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

ADDITIONAL ALLOCATIONS FOR DIFFERENTIAL COST FACTORS

Section 1.5 — ECS Mild/Moderate Disabilities/Delays, Gifted and Talented

ALLOCATION FORMULA

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

1. **Children with mild/moderate disabilities/delays** or those who are gifted and talented, must be at least 3 years 6 months of age and less than 6 years of age on September 1.
2. Coding
 - a) Code 30 Mild/Moderate disabilities/delays.
 - b) Code 80 gifted and talented.
 - c) Grants Code 500 must be used with both Code 30 and 80.
3. **Children with mild/moderate disabilities/delays** or children who are gifted and talented and who are between the ages of 3 years 6 months but less than 4 years 6 months old on September 1, that are identified after the **September count date** and are reported on the **March Count**, will be eligible for 50 per cent ECS Mild/Moderate or Gifted and talented funding and 50 per cent ECS Base Instruction funding.

REFERENCES

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

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

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

Section 1.6 — ECS Program Unit Funding (PUF)

ALLOCATION FORMULA

1. The funding amount paid will be the lesser of:
 - a) the approved budget amount,
 - b) the program unit ceiling amount, or
 - c) the actual costs.
2. a) calculation of the ceiling amount for a program unit with one program unit funded child:
 - i. **Centre-Based Programming**

$$\text{Ceiling Amount} = \frac{\text{\# of centre hours (max. 800)}}{800 \text{ hours}} \times \text{Rate for one program unit funded child}$$

- ii. Combined Program: **Centre-Based And Family-Oriented Programming Sessions**

$$\text{Ceiling Amount} = \left(\frac{\text{\# of centre hours (max. 800)}}{800 \text{ hours}} + \frac{\text{\# of sessions (min. 4 max 36)}}{36 \text{ sessions}} \right) \times \text{Rate for one program unit funded child}$$

- b) calculation of the ceiling amount for a program unit with more than one program unit funded child (**clustering**).

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

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

$$\left(\frac{\text{\# of centre hours (max 800)}}{800 \text{ hours}} + \frac{\text{\# of Sessions (min 4 max 36)}}{36 \text{ Sessions}} \right) \times \text{Rate for each additional PUF child in a unit}$$

- c) calculation of the ceiling amount when a child's program starts after September 30 or ends before May 25 will be the lesser of the following ceiling calculations:
 - i. a pro-rated ceiling based on the number of months of the child's PUF program multiplied times \$2,456 per month, or
 - ii. the ceiling calculation as shown in 2 a) (i) or (ii) –whichever is applicable.
- d) maximum funding for a program unit child is based on 800-hours of **centre-based programming** or 36 **family-oriented programming** sessions or combination thereof.

ALLOCATION CRITERIA

1. Program Unit Funding (PUF) may be paid to a **school authority** for each eligible **child with a severe disability/delay** for a maximum of three years.
2. 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.
3. **School authorities** will use the *Special Education Coding Criteria 2009/2010* to determine the child's eligibility and proper coding.

4. A child's eligibility for PUF will be based on all of the following:
 - a) assessment by qualified personnel of a severe disability/delay.
 - b) documentation that demonstrates the 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**.

Note: assessment information must be sent to the Special Programs Branch for pre-approval of each child's eligibility prior to submission of a PUF application.

5. Payment is based on approval of a PUF application. Each **school authority** is only allowed to submit one PUF application that contains all of their PUF children on it.
6. Only one **school authority** will be funded for a PUF child for the same time period. When a PUF child moves from one **school authority** to another one, the first school authority must revise the child's program end date on the PUF application and the second **school authority** must submit a PUF application for the time the child is with them.
7. 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.
8. 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 authority and the parent, an ECS program is the most appropriate program for the PUF child.
9. **Designated Special Education ECS programs** must comply with all Allocation Criteria as outlined in this section.
10. A funded **child** receiving PUF is not eligible for ECS mild/moderate funding.

REFERENCES

[ECS Special Education Handbook](#)

[Special Education Coding Criteria — 2009/2010](#)

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

Section 1.7 — Severe Disabilities Profile (School Jurisdictions)

ALLOCATION FORMULA

Severe Disabilities Allocation	=	Severe disabilities profile number	X	Severe Disabilities Rate
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ALLOCATION CRITERIA

1. Funding for **students with severe disabilities** will be based on the jurisdiction's severe disabilities profile number but all of the following requirements must 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) **students with severe disabilities** must receive three or more of the **levels of support** identified to meet their educational needs.
 - d) a current **Individualized Program Plan (IPP)** based on the *Standards for Special Education, amended June 2004*, which addresses the student's diagnosed needs
- REVISD 2. To determine a student's eligibility and proper coding, **school jurisdictions** will use the *Special Education Coding Criteria 2009/2010* and the *Handbook for the Identification and Review of Students with Severe Disabilities*.
3. **School jurisdictions** are not required to transfer funds if a student with severe disabilities moves after the **September count date** to another **school jurisdiction**, an **accredited funded private school** including DSEPS, or a **charter 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 October 31.
5. **Students with severe disabilities in charter schools** are funded under Section 3.3 of this Manual.

REFERENCES

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

[Special Education Coding Criteria 2009/2010](#)

[Standards for Special Education, Amended June 2004](#)

Section 1.8 — English as a Second Language

ALLOCATION FORMULA

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

1. Annual assessments must support insufficient fluency in English to achieve grade level expectations in English Language Arts and other subject areas.
2. **Funded children/students** eligible for ESL funding must be coded either
 - a) Foreign born code 301, or
 - b) Canadian born code 303.
- REVISD 3. Two enrolment counts are taken for ESL funding for eligible **funded children/students**, one on the **September count date**, and another on the **March count date**.
Each count will be used for funding 50 per cent of the **school year**, unless the **March count** of ESL students is lower than the **September count**, then the **September count** will be used for the entire **school year**.

4. **ESL funded children** between the ages of 3 years 6 months and 4 years 6 months on September 1 that are identified after the **September count date** and reported on the **March count** will be eligible for 50 per cent ECS ESL Funding and 50 per cent of the ECS Base Instruction funding.
5. Funding is provided for a maximum of 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.

Section 1.9 — Francisation (Francophone Regional Authorities only)

ALLOCATION FORMULA

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

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

Section 1.10 — Enhanced ESL/Francisation

ALLOCATION FORMULA

$$\text{Enhanced ESL/Francisation for immigration Student Allocation} = \left(\begin{array}{c} \# \text{ of eligible ESL} \\ \text{FTE funded} \\ \text{children/students} \\ \text{foreign born} \end{array} \text{ or } \begin{array}{c} \# \text{ of eligible} \\ \text{Francisation FTE} \\ \text{funded} \\ \text{children/students:} \\ \text{Foreign born} \end{array} \right) \times \text{Enhanced ESL/Francisation Rate}$$

ALLOCATION CRITERIA

1. This funding is for **funded children/students** who are functionally illiterate in their language of origin, have little or no exposure to English or French, or formal schooling, have significant challenges to successful enculturation and have been exposed to traumatic events in their country arising from political or civil unrest.
2. Funding is based on the **FTE funded enrolment** counts determined under Sections 1.8 and 1.23:
 - a) Code 301: ESL Foreign-born
 - b) Code 307: **Francisation** Foreign-born.
3. Two enrolment counts are taken for ESL funding for eligible **funded children/students**: one on the **September count date** and another on the **March count date**.
Each count will be used for funding 50 per cent of the **school year**, unless the February 27, 2009 count of ESL students is lower than the count on the **September count date**, then the count on the **September count date** will be used for the entire **school year**.
4. This funding is now available for **funded children** starting at age 3 years 6 months as of September 1 of the current **school year**. Foreign born ESL **funded children** between the ages of 3 years 6 months and less than 4 years 6 months on September 1, that are identified after the **September count date** and reported on the **March count**, will be eligible for 50 per cent Enhanced ESL/**Francisation** funding and 50 per cent ECS Base Instruction funding.
5. **Francophone Regional Authorities** may claim both Enhanced **Francisation** funding and Enhanced ESL funding for the same child/student.

- UPDATED** 6. **Funded students** enrolled in **home education, blended programs, outreach programs or on-line programs** are not eligible for funding under this section.

Section 1.11 — First Nations, Métis and Inuit Education Allocation

ALLOCATION FORMULA

$$\text{First Nations, Metis, and Inuit (FNMI) Education Allocation} = \begin{array}{c} \# \text{ of FTE FNMI} \\ \text{children/students} \end{array} \times \text{FNMI Rate}$$

ALLOCATION CRITERIA

- UPDATED** 1. Funding for **school jurisdictions** is based on the number of self-identified FNMI **FTE children/students**. Funding for level 2* **accredited funded private schools** is based on the number of self-identified FNMI **FTE students** only -note does not include FNMI **FTE children**.

2. The following types of self-identified FNMI students/children in **school jurisdictions** who reside off reserve are funded by Alberta Education and should be coded as follows:
 - a) Code 331 Aboriginal Learner – Status Indian/First Nations
 - b) Code 332 Aboriginal Learner – Non Status Indian/First Nations
 - c) Code 333 Aboriginal Learner – Métis
 - d) Code 334 Aboriginal Learner – Inuit.

UPDATED

These students/children are self-identified and a signed declaration is required annually, as is all of the information on the school registration form.

3. **First Nations students who reside on a reserve** and who attend an Alberta school off reserve, are funded by the Government of Canada and do not qualify for funding under this section. These students should be coded 330 for funding purposes. In addition to the 330 code, they should also be coded as 331 if they choose to self-identify for data collection purposes under the Aboriginal Learner Data Collection Initiative (ALDCI). Therefore, both codes may be entered for these students and the 330 code will over-ride the 331 for funding purposes.

UPDATED

4. **Funded students** enrolled in **home education**, **blended**, or **on-line programs** are not eligible for funding under this section.

REFERENCES

[Aboriginal Learner Data Collection Initiative](#)

[Guide to School Board Planning and Results Reporting \(2009\)](#)

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

[Guide to Accredited Funded Private School Education Plan and Results Reporting](#)

*As per Accountability and Declaration Form 09AE3.0

Section 1.12 — Daily Physical Activity

ALLOCATION FORMULA

DPA Allocation	=	# of eligible Grade 1 - 9 schools	X	DPA Rate
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ALLOCATION CRITERIA

1. Daily Physical Activity (DPA) funding is provided to **school authorities** 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.

Section 1.13 — Socio-Economic Status (SES) Allocation

ALLOCATION FORMULA

SES Allocation	=	Incident Rate	X	FTE funded enrolment	X	SES Rate
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UPDATED

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

UPDATED

School Jurisdiction	SES Incidence Rate
Almadina School Society	0.500
Aspen View Regional Division No. 19	0.224
Aurora School Ltd.	0.165
Battle River Regional Division No. 31	0.195
Black Gold Regional Division No. 18	0.180
Boyle Street Education Centre	1.000
Buffalo Trail Public Schools Regional Division No. 28	0.184
Calgary Arts Academy Society	0.156
Calgary Girls' School Society	0.130
Calgary Roman Catholic Separate School District No. 1	0.185
Calgary School District No. 19	0.218
Calgary Science School Society	0.201
Canadian Rockies Regional Division No. 12	0.219
CAPE – Centre for Academic and Personal Excellence Institute	0.226
Chinook's Edge School Division No. 73	0.191
Christ the Redeemer Catholic Separate Regional Division No. 3	0.178
Clearview School Division No. 71	0.178
East Central Alberta Catholic Separate Schools Regional Division No. 16	0.194
East Central Francophone Education Region No. 3	0.203
Edmonton Catholic Separate School District No. 7	0.237
Edmonton School District No. 7	0.256
Elk Island Catholic Separate Regional Division No. 41	0.153
Elk Island Public Schools Regional Division No. 14	0.175
Evergreen Catholic Separate Regional Division No. 2	0.177
Foothills School Division No. 38	0.180
Fort McMurray Public School District No. 2833	0.187
Fort McMurray Roman Catholic Separate School District No. 32	0.175
Fort Vermilion School Division No. 52	0.200
Foundations for the Future Charter Academy Charter School Society	0.186
Golden Hills School Division No. 75	0.221
Grande Prairie Roman Catholic Separate School District No. 28	0.181
Grande Prairie School District No. 2357	0.219
Grande Yellowhead Regional Division No. 35	0.218
Grasslands Regional Division No. 6	0.185

UPDATED

School Jurisdiction	SES Incidence Rate
Greater North Central Francophone Education Region No. 2	0.229
Greater Southern Public Francophone Education Region No. 4	0.205
Greater Southern Separate Catholic Francophone Education Region No. 4	0.168
Greater St. Albert Catholic Regional Division No. 29	0.165
High Prairie School Division No. 48	0.280
Holy Family Catholic Regional Division No. 37	0.247
Holy Spirit Roman Catholic Separate Regional Division No. 4	0.211
Horizon School Division No. 67	0.193
Lakeland Roman Catholic Separate School District No. 150	0.242
Lethbridge School District No. 51	0.227
Living Waters Catholic Regional Division No. 42	0.221
Livingstone Range School Division No. 68	0.221
Lloydminster Public School Division	0.200
Lloydminster Roman Catholic Separate School Division	0.200
Medicine Hat Catholic Separate Regional Division No. 20	0.211
Medicine Hat School District No. 76	0.231
Mother Earth's Children's Charter School Society	0.214
New Horizons Charter School Society	0.114
Northern Gateway Regional Division No. 10	0.207
Northern Lights School Division No. 69	0.227
Northland School Division No. 61	0.298
Northwest Francophone Education Region No. 1	0.206
Palliser Regional Division No. 26	0.191
Parkland School Division No. 70	0.172
Peace River School Division No. 10	0.238
Peace Wapiti School Division No. 76	0.194
Pembina Hills Regional Division No. 7	0.198
Prairie Land Regional Division No. 25	0.182
Prairie Rose School Division No. 8	0.224
Red Deer Catholic Regional Division No. 39	0.203
Red Deer Public School District No. 104	0.232
Rocky View School Division No. 41	0.145
St. Albert Protestant Separate School District No. 6	0.178
St. Paul Education Regional Division No. 1	0.195
St. Thomas Aquinas Roman Catholic Separate Regional Division No. 38	0.225
Sturgeon School Division No. 24	0.182
Suzuki Charter School Society	0.169
Valhalla School Foundation	0.194
Westmount Charter School Society	0.121
Westwind School Division No. 74	0.205
Wetaskiwin Regional Division No. 11	0.231
Wild Rose School Division No. 66	0.205
Wolf Creek School Division No. 72	0.223

Section 1.14 — Relative Cost of Purchasing Allocation

ALLOCATION FORMULA

$$\text{RCPA} = \left(a + b + c \right) \times d$$

Where,

- a = 20% x School jurisdiction funding -see exclusions in Allocation Criteria #1
- b = 47 per cent x Transportation and Boarding funding
- c = 75 per cent x Plant Operations and Maintenance funding
- d = RCPA Adjustment factor (min. value 1.0)

ALLOCATION CRITERIA

- The following are excluded from the calculation of school jurisdiction funding in “a” :
Provincial Priority Targeted funding (Part 5 of the Manual), Stabilization, Transportation, Boarding, Plant Operations and Maintenance, Fuel Price Contingency, and Capital funding.
- The Jurisdiction RCPA Index number is based on the spatial price index developed by Alberta Economic Development, which will be reviewed and adjusted regularly. The RCPA Adjustment Factor is determined by taking the Jurisdiction RCPA Index number as indicated in the table below and subtracting 1.0.
- 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.
- 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 benchmark centre.

UPDATED

School Jurisdiction	RCPA Index
Almadina School Society	1.055
Aspen View Regional Division No. 19	1.009
Aurora School Ltd.	1.036
Battle River Regional Division No. 31	1.000
Black Gold Regional Division No. 18	1.020
Boyle Street Education Centre	1.036
Buffalo Trail Public Schools Regional Division No. 28	1.000
Calgary Arts Academy Society	1.055
Calgary Girls' School Society	1.055
Calgary Roman Catholic Separate School District No. 1	1.055
Calgary School District No. 19	1.055
Calgary Science School Society	1.055
Canadian Rockies Regional Division No. 12	1.090
CAPE - Centre for Academic and Personal Excellence Institute	1.000
Chinook's Edge School Division No. 73	1.001
Christ the Redeemer Catholic Separate Regional Division No. 3	1.009
Clearview School Division No. 71	1.001
East Central Alberta Catholic Separate Schools Regional Division No. 16	1.000
East Central Francophone Education Region No. 3	1.003
Edmonton Catholic Separate School District No. 7	1.036
Edmonton School District No. 7	1.036
Elk Island Catholic Separate Regional Division No. 41	1.029
Elk Island Public Schools Regional Division No. 14	1.034
Evergreen Catholic Separate Regional Division No. 2	1.032
Foothills School Division No. 38	1.007
Fort McMurray Public School District No. 2833	1.146
Fort McMurray Roman Catholic Separate School District No. 32	1.146
Fort Vermilion School Division No. 52	1.000
Foundations for the Future Charter Academy Charter School Society	1.055
Golden Hills School Division No. 75	1.026
Grande Prairie Roman Catholic Separate School District No. 28	1.030
Grande Prairie School District No. 2357	1.032
Grande Yellowhead Regional Division No. 35	1.009
Grasslands Regional Division No. 6	1.000
Greater North Central Francophone Education Region No. 2	1.037
Greater Southern Public Francophone Education Region No. 4	1.007
Greater Southern Separate Catholic Francophone Education Region No. 4	1.058
Greater St. Albert Catholic Regional Division No. 29	1.036
High Prairie School Division No. 48	1.018
Holy Family Catholic Regional Division No. 37	1.011
Holy Spirit Roman Catholic Separate Regional Division No. 4	1.000
Horizon School Division No. 67	1.000

UPDATED

School 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	1.001
Livingstone Range School Division No. 68	1.000
Lloydminster Public School Division	1.000
Lloydminster Roman Catholic Separate School Division	1.000
Medicine Hat Catholic Separate Regional Division No. 20	1.000
Medicine Hat School District No. 76	1.000
Mother Earth's Children's Charter School Society	1.036
New Horizons Charter School Society	1.036
Northern Gateway Regional Division No. 10	1.014
Northern Lights School Division No. 69	1.005
Northland School Division No. 61	1.030
Northwest Francophone Education Region No. 1	1.024
Palliser Regional Division No. 26	1.008
Parkland School Division No. 70	1.033
Peace River School Division No. 10	1.000
Peace Wapiti School Division No. 76	1.031
Pembina Hills Regional Division No. 7	1.000
Prairie Land Regional Division No. 25	1.015
Prairie Rose School Division No. 8	1.003
Red Deer Catholic Regional Division No. 39	1.000
Red Deer Public School District No. 104	1.000
Rocky View School Division No. 41	1.051
St. Albert Protestant Separate School District No. 6	1.036
St. Paul Education Regional Division No. 1	1.000
St. Thomas Aquinas Roman Catholic Separate Regional Division No. 38	1.018
Sturgeon School Division No. 24	1.032
Suzuki Charter School Society	1.036
Valhalla School Foundation Society	1.031
Westmount Charter School Society	1.055
Westwind School Division No. 74	1.000
Wetaskiwin Regional Division No. 11	1.000
Wild Rose School Division No. 66	1.000
Wolf Creek School Division No. 72	1.000

Section 1.15 — Northern Allowance

ALLOCATION FORMULA

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

ALLOCATION CRITERIA

1. Northern allowance funding is provided to eligible **school jurisdictions** based on the **FTE funded enrolment** of all **schools** located in their respective zones. Funding for eligible level 2* **accredited funded private schools** is based on **FTE funded students**.
2. Zones are described as follows:
 - a) Lower Zone – **schools** located between the 55th and 56th parallels of latitude.
 - b) Intermediate Zone – **schools** located between the 56th and 57th parallels.
 - c) Upper Zone – **schools** located north of the 57th parallel of latitude.
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**, **online programs** and Hutterite Colony schools are not eligible for funding under this section.

*As per Accountability and Declaration Form 09AE3.0

Section 1.16 — Intra Jurisdiction

ALLOCATION FORMULA

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

g) **URBAN CENTRES***:

$$\text{Intra-Jurisdiction Distance Allocation} = \left(\frac{\text{Distance from each school to the central administration office of the school jurisdiction} - 15\text{kms}}{\text{Eligible FTE funded enrolment}} \right) \times \text{Distance Rate}$$

OR,

h) **NON URBAN CENTRES**:

$$\text{Intra-Jurisdiction Distance Allocation} = \left(\frac{\text{Distance from each school to the central administration office of the school jurisdiction} - 25\text{kms}}{\text{Eligible FTE funded enrolment}} \right) \times \text{Distance Rate}$$

*For the purpose of this section, Urban Centres are: Calgary, Edmonton, Red Deer, Lethbridge, Medicine Hat, Fort McMurray, Grande Prairie and St.Albert.

ALLOCATION CRITERIA

1. 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**.
2. **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.
3. Students enrolled in **home education**, **online**, and **Institutional** programs and Hutterite Colony Schools are not counted for funding under this section.
4. An eligible school will be funded at a minimum 100 FTE or the actual enrolment, which ever is greater.

Section 1.17 — Enrolment Growth

ALLOCATION FORMULA

Enrolment 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**.

$$\text{School Jurisdiction Level Allocation} = \left(\frac{\% \text{ enrolment growth this year over the prior year} - 4\%}{100} \right) \times \text{FTE funded enrolment from the prior year} \times \text{Enrolment Growth Rate}$$

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.

$$\text{School level allocation (for each eligible school)} = \left(\frac{\% \text{ enrolment growth this year over the prior year} - 7\%}{100} \right) \times \text{FTE funded enrolment from the prior year} \times \text{Enrolment Growth Rate}$$

ALLOCATION CRITERIA

1. Funding eligibility;
 - a) **School Jurisdiction** – enrolment growth >4 per cent year to year.
 - b) **Schools** – enrolment growth >7 per cent year to year.

(Hutterite Colony Schools located in a **school jurisdiction** will be treated as one school enrolment).
2. Enrolment growth funding is not provided for in-year enrolment growth at either the **school jurisdiction** level or at the **school** level.
3. Enrolment growth funding is provided for a new **school** that begins operating on or before the **September count date**. If circumstances prohibit the **school** from beginning operation on or before the **September count date**, the Director of School Finance may consider approval of another count date for enrolment growth funding. School level enrolment growth funding will not be provided for schools transferred from one **school authority** to another.
4. Enrolment growth funding is provided for enrolment growth resulting from an expanded program that is implemented on or before the **September count date**.
5. Enrolment growth funding is one-time in nature. Growth is determined on a year-to-year basis and involves the enrolments of the current year and the immediate preceding year. School Finance may review enrolment growth reported by **school jurisdictions** for reasonableness.

6. **Charter schools** will be treated as **school jurisdictions** and will qualify for enrolment growth funding only at the jurisdiction level.
7. For determining enrolment growth in **schools** that share a physical address with another **school(s)**, the sum of the enrolments of all **schools** that share that address will be treated as one **school** enrolment.
8. Students enrolled in Home education, and **online programs** are not counted for **school jurisdiction** enrolment growth funding under this section.
9. Students enrolled in **home education**, **outreach programs** and **online programs** are not counted for **school** enrolment growth funding under this section.

Section 1.18 — Enrolment Decline

ALLOCATION FORMULA

Enrolment 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**.

$$\text{School Jurisdiction Level Allocation} = \left(\begin{array}{c} \% \text{ Enrolment} \\ \text{Decline from the} \\ \text{prior year to the} \\ \text{current year} \end{array} - 1.50\% \right) \times \text{FTE funded enrolments} \times \text{Enrolment Decline Rate}$$

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.

$$\text{School Level Allocation} = \left(\begin{array}{c} \% \text{ Enrolment} \\ \text{Decline from the} \\ \text{prior year to the} \\ \text{current year} \end{array} - 4.00\% \right) \times \text{FTE funded enrolments} \times \text{Enrolment Decline Rate}$$

ALLOCATION CRITERIA

1. Funding eligibility:
 - a. **School Jurisdictions** – enrolment decline >1.5 per cent year to year
 - b. **Schools** – enrolment decline >4 per cent year to year

(Hutterite Colony schools located in a **school jurisdiction** will be treated as one school enrolment)
2. Enrolment decline funding will not be provided for enrolment 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**.
3. Enrolment decline funding is not provided for in-year enrolment decreases.
4. Enrolment decline funding is not provided in **school** closure situations.
5. Enrolment decline funding is one-time in nature since these enrolment decreases are determined on a year-to-year basis and involve the current year and the immediate preceding year enrolments. Enrolment decline attributable to a program being moved from one **school** to another does not qualify. School Finance may review enrolment decline reported by **school jurisdictions** for reasonableness.
6. **Charter schools** will be treated as **school jurisdictions** and will qualify for Enrolment Decline funding only at the jurisdiction level.
7. For determining enrolment decline in **schools** that share a physical address with another **school(s)**, the sum of the enrolments of all **schools** that share that address will be treated as one **school** enrolment.

8. Students enrolled in **home education**, **outreach programs**, and **online programs** are not counted for **school** enrolment decline funding under this section.
9. Students enrolled in **home education**, and **online programs**, are not counted for **school jurisdiction** enrolment decline funding under this section.

Section 1.19 — Small Schools by Necessity

ALLOCATION FORMULA

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

1. Total Base Allocation:
 - a) for each school with a '**FTE funded enrolment**' of 150 or fewer; Base Allocation = \$85,693.
 - b) for each school with a '**FTE funded enrolment**' greater than 150 but fewer than 226;

$$\text{Base Allocation} = \$86,550 - \left[\left(\frac{\$86,550}{76} \right) \times \left(\text{FTE Funded Enrolment} - 150 \right) \right]$$

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

2. Total Variable Allocation:

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

TABLE 1

Grade Category	School Rate	Peak Enrolment	Small School *FTE Funded Enrolment Limit	# of Grades in the Grade Configuration
K to 3	\$577	40	80	3.5
K to 6	\$1618	80	150	6.5
K to 9	\$1,848	80	220	9.5
K to 12	\$2,886	80	290	12.5

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

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

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

Where

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

And

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

a)

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

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

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

Where

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

3. Total # of Small Schools

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

4. Total # of Small Schools by Necessity

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

- 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.
- the 'receiving schools' must have available capacity to accommodate the additional students. Available capacity at a 'receiving school' is defined as 85 per cent of the **school building** capacity, less the 'FTE weighted funded enrolment'.
- the small school 'FTE weighted funded enrolment' can be designated 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 do not meet all three conditions.

5. Closed Schools Allocation

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

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

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

6. Students enrolled in **schools of choice** such as outreach, Home education, **charter schools**, Hutterite Colony Schools are not counted for funding under this section.

Section 1.20 — Small Board Administration

ALLOCATION FORMULA

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

Small **School Board**
Administration
Allocation

- = a) \$461,594 for a **school jurisdiction** (excluding **charter schools**) with **FTE funded enrolment** of 2,000 students or less

OR

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

$$\$461,594 - \left[\$461.60 \times \left(\text{FTE funded enrolment} - 2,000 \right) \right]$$

OR

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

FTE Funded Enrolment	Allocation Formula
i. less than 500	\$190,036
ii. Between 500 - 2,000	(i) + $\left[\$105 \times \left(\text{enrollment} - 500 \right) \right]$
iii. between 2,001 - 3,000	(i) + (ii) - $\left[\$455 \times \left(\text{enrollment} - 2,000 \right) \right]$
iv. greater than 3,000	No Small Board Administration Allocation

Section 1.21 — Stabilization

ALLOCATION FORMULA

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 Enrolment Decline

ALLOCATION CRITERIA

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 enrolment decline.
3. Stabilization funding is determined as follows:
 - a) Stabilization Funding is estimated in September each year, using previous year enrolments, **school jurisdiction's** estimates of current year enrolments 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 enrolments are finalized.
4. The following example shows how Stabilization Funding is determined:

Enrolment Data	
Year	Funded Enrolment
03/04	5100
04/05	5100
05/06	5050
06/07	5000
07/08	4900
08/09	5000

2003-2004 Base year Calculation	
Total Eligible Funding	
Previous Framework:	\$35,912,000.00
Less	
Renewed Funding Framework:	\$34,612,000.00
03 - 04 Stabilization Funding	\$1,300,000.00

ADJUSTMENTS: Funding rate increase for each year and enrolment decline for each year:				
2004/2005:				
\$1,300,000	x 1.02	x $\frac{5100}{5100}$	=	\$1,326,000
2005/2006:				
\$1,326,000	x 1.02	x $\frac{5050}{5100}$	=	\$1,339,260
2006/2007:				
\$1,339,260	x 1.02	x $\frac{5000}{5050}$	=	\$1,352,520
2007/2008				
\$1,352,520	x 1.03	x $\frac{4900}{5000}$	=	\$1,365,234
2008/2009				
\$1,365,234	x 1.0453	x $\frac{4850}{4900}$	=	\$1,412,517

Section 1.22 — Hutterite Colony Schools

ALLOCATION FORMULA

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

- 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
- proof of consultation with the Hutterite colony(ies) affected when developing the application.

SECTION 1.23 — Francophone Equivalency (Francophone Regional Authorities)

ALLOCATION FORMULA

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

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

SECTION 1.24 — Plant Operations and Maintenance (School Jurisdictions)

ALLOCATION FORMULA

Plant Operations and Maintenance Allocation	[Base Line Funding	x	(1 + Sparsity-Distance Factor)]	+	Travel Time Allowance	+	Small School Necessity Differential
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1. Baseline Funding:

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

Grades	Rate per Weighted FTE
K - 6	\$779.71
7 – 9	\$736.45
10 – 12	\$740.57

2. Sparsity-Distance Factor:

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

The following table determines the combined Sparsity-Distance Factor % for jurisdictions.

Sparsity-Distance Factor Table

Distance Factor	Sparsity Factor					
	0 to 0.249	.25 to 0.99	1 to 1.49	1.5 to 1.99	2 to 2.49	2.5 to 3.0
0 - 100km	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%

3. Travel Time Allowance

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.

4. Small Schools By Necessity (SSBN) Differential

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

- SSBN Differential X K-6 per cent of total funded enrolments X \$779.71 per student
- SSBN Differential X Gr. 7 – 9 per cent of total funded enrolments X \$736.45 per student
- SSBN Differential X Gr. 10 – 12 per cent of total funded enrolments X \$740.57 per student

Each school's SSBN Differential is determined as follows:

- (school's capacity X 85 per cent) less school's enrolment
- The total SSBN differential is the sum of the SSBN differentials calculated for each school.

The "% of total funded enrolments" is calculated by dividing the 2008/2009 funded enrolment for the grade range by the total 2008/2009 funded enrolment (across all grades) for the **school jurisdiction**. The jurisdiction's 2008/2009 "funded enrolments" are calculated using the same criteria as for the Baseline Funding component.

The SSBNs used in this formula are those that qualified for SSBN funding in the 2008/2009 **school year** (section 1.19).

5. Charter Schools are not eligible for the SSBN component of this funding.

Section 1.25 — Charter Schools

ALLOCATION FORMULA

The funding formula and rates under Part 1, Part 3, Part 5, Part 6; and Part 8 that apply to **school jurisdictions**, also apply to **charter schools**. However, **charter schools** are not eligible to claim funding under section 1.7 Severe Disabilities, section 1.4 Home Education and section 6.5 Debt Retirement.

ALLOCATION CRITERIA

1. Base Instruction

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

2. Transportation

- a) A **charter 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**.
- b) If a **charter board** is unable to reach an agreement with a **school jurisdiction** for the transportation of its urban students, the **charter school** may claim Student Transportation funding for these students transported at the base urban student transportation rate for **school boards** with a city, town, village or hamlet with a population greater than 30,000.
- c) **Charter boards** who are unable to reach an agreement with a **school jurisdiction** for the transportation of their rural students, may claim, with respect to each **eligible passenger** resident in a **rural district** or **division**, the base **density** rate provided per **eligible passenger** transported for which the **board** of that **rural district** or **division** is eligible. Where an eligible passenger resides within the boundaries of a separate district, funding will be provided for that eligible passenger at the lowest **density** rate between the separate district and the public district.

3. 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.

4. The student count used by a **charter school** as of the **September count date** must not include students counted by another **school authority** on the **September count date**.

REFERENCES

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

[Charter Schools Handbook \(2002\)](#)

TRANSPORTATION

Section 1.26 — Boarding

ALLOCATION FORMULA

Boarding Allocation	=	# funded students eligible for funding	x	Funding Rate for Boarding
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ALLOCATION CRITERIA

1. The **parents** of the eligible funded student must reside in the **school jurisdiction**.
2. Funding for boarding is not paid to a **school jurisdiction** for a **resident student** who is:
 - a) attending a **private school** outside Alberta when the education program has not been previously approved by the **Minister**, or
 - b) enrolled after the **September count date**.

UPDATED Section 1.27 — Fuel Price Contingency

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 variables of the road distance from consumption rates, and the average monthly price of fuel. The formula is based on a 60 cent per litre.
3. For metro **school jurisdictions**, the formula is based on estimated kilometers traveled. **Charter schools** that utilize public transit receive a funding adjustment based on local transit pass costs.
4. For more information on your **school jurisdiction's** funding allocation, please contact the Business Operations and Stakeholder Support branch for details.

Section 1.28 — Rural Transportation

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**

i.	Density Support	=	Applicable Annual Density Rate per Eligible Passenger/Eligible Transported ECS Child	X	Applicable Weighting Factor	X	Eligible Passenger/Eligible Transported ECS Child
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ii.	Distance Support	=	Applicable Annual Distance Rate	X	Applicable Eligible Transportation Distance (kms) for each Eligible Passenger/Eligible Transported ECS Child
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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:

Inter School Support	=	Daily km's of the Inter-School Transportation for the Bus	X	Number of Days of Inter-School Transportation in the school year for the bus	X	Support Rate
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The total annual support for inter-school transportation is the aggregate of the amounts calculated for each bus providing inter-school transportation.

- c) **Cooperative Transportation**

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

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

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

Refer to Section 1.31, Special Transportation

ALLOCATION CRITERIA

1. If an **eligible passenger** or **eligible transported ECS child** resides in a city, town, village or hamlet with a population greater than 10,000, claims for **eligible passengers** must be made under Section 1.29 Urban Transportation Funding.

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 receive funding for each **eligible passenger** and for each **eligible 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 per cent 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 per cent decrease.

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

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) 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 a cooperative bussing arrangement with another **board** and the two **boards** are not sharing a co-terminus area, the area of the **board** receiving transportation services 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 a cooperative bussing arrangement is not eligible for rural transportation funding.
- 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 route **school bus** will be claimed under this section using the **density** and **distance** formula and are not eligible for funding under Section 1.31, Special Transportation.
- i) buses that are designated only for the transportation of those **students with disabilities** who cannot, because of the severity of their disability, ride a regular route **school bus** can be claimed under section 1.31, Special Transportation. (NOTE: all students on designated buses 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.

UPDATED

3. ECS Transportation:

- a) a **school jurisdiction** that claims ECS Regular Transportation funding must transport, or make arrangements for the transport of **funded children** attending **ECS programs** at a service level that is consistent with the transportation of students under Section 51(1) of the *School Act*.
- b) a **school jurisdiction** providing transportation to and from an **ECS program** may charge the **parent** of a **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 a **transportation agreement** with the other **board**, **private school**, or **private ECS operator**.
- e) ECS **children with disabilities/delays** who require special transportation will be funded at the ECS Special Transportation rate. Transportation funding for these children must be claimed under Section 1.33 of this Manual.

UPDATED

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) Off-Campus Education Programs, recreational programs, and intermittent bussing to such activities as swimming programs are not eligible for inter-school transportation support.

UPDATED

- 5. Funding shall not be paid under this section for a **funded student** who is counted under Special Transportation funding (Section 1.31) or a **funded child** who is counted under Section 1.33.
- 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 **school board** at its discretion transports the student to that school, transportation support shall be paid based on the **distance** from the student's residence to the school to which the student was directed. The following is a list of program considerations:
 - **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/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).
- 7. A **board's** resident students in an **Online program** or an **Outreach program** -where they are accessing 50 per cent or more of their educational program at a **school** of the **board**- or students in a **Blended program**, that are transported by the **board** to a **school** of the **board**, may be claimed as **eligible passengers** under Rural Transportation.

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: the 2009/2010 "RURAL CLAIM" includes the Rural Special Transportation section in the claim form; please refer to Section 1.31 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 per cent of the previous year's funded monthly amount until the review of the new funding application has been completed. If the new funding application has not been received by December 31, the January payment will be reduced to 75 per cent of the previous year funded monthly amount retroactive to September 1 and continued until the new funding application is received and reviewed.
3. Only **funded students** and **funded children** enrolled on the **September count date** are eligible for funding. Special consideration for the **September count date** may be given to **school jurisdictions** experiencing exceptional growth in transportation needs.
4. 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 **September 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 *Traffic Safety Act*; and
 - i) Copies of contracts with:
 - i. operators of contracted busses for all transportation;
 - ii. **parents** providing transportation indicating the amount to be paid; and
 - iii. agents providing special transportation for **students with disabilities**.

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 1.14

Section 1.29 — Urban Transportation

ALLOCATION FORMULA

1. **Urban District** transportation:

$$\text{Urban Transportation Allocation} = \left(\text{Eligible passengers Grades 1 to 12} + \text{Eligible transported ECS children} \right) \times \text{Urban Transportation Rate}$$

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.

$$\text{Francophone Urban Transportation Allocation} = \left(\text{Francophone eligible passengers Grades 1 to 12} + \text{Francophone eligible transported ECS children} \right) \times 3.5 \text{ (weighted factor)} \times \text{Urban Transportation Rate}$$

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:

$$\text{Inter-School Support} = \text{Daily km's of Inter-school Transportation for the bus} + \frac{\text{\# of days of the Inter-school Transportation in the school year for the school bus}}{66} \times \text{Support Rate}$$

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 1.28;
 - 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.
- UPDATED 8. ECS **children with disabilities/delays** who require special transportation will be funded at the ECS Special Transportation rate. Transportation funding for these children must be claimed under Section 1.33 of this Manual.
- UPDATED 9. Funding shall not be paid under this section for a **funded student** who is counted under Special Transportation funding (Section 1.31) or a **funded child** who is counted under Section 1.33.
10. Inter-school transportation funding is not provided for transporting students or ECS children between **schools**.
11. Where a **board** has adopted over-lapping **school** attendance or transportation service areas, eligibility for funding is determined by the **distance** to the **school** nearest the student's residence.
12. 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.
13. 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 enrolment of that **school** is equal to or greater than its rated capacity, then the number of students transported that is equal to or greater than the number of students not resident within the attendance area or transportation service area and enrolled in that **school** shall be deducted from the number of **eligible passengers** claimed for funding under this section.
14. 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.
15. 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**.
16. **Eligible passengers** with severe disabilities who ride on a regular route **school bus** will be claimed under this section using the urban transportation rate and are not eligible for funding under Section 1.31, Special Transportation.

Buses that are designated only for the transportation of those **students with disabilities** who cannot, because of the severity of their disability, ride a regular route **school bus** can be claimed under Section 1.31, Special Transportation. (NOTE: all students on designated busses must be claimed under the same section.)
17. Transportation funding shall be based on the eligible **distance** from the student's residence to the nearest school in the attendance area or transportation service area in which the student resides.

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

The following is a list of program considerations:

- **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/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).
18. Students in an **Online program** or an **Outreach program** -where they are accessing 50 per cent or more of their educational program at a **school** of the **board**- or students in a **Blended program**, that are transported by the **board** to a **school**, may be claimed as **eligible passengers** under Urban Transportation.
19. 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) Off-Campus Education 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 2009/2010 "URBAN CLAIM" includes the Urban Special Transportation section on the claim form; please refer to Section 1.31 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 per cent of the previous year's funded monthly amount until the review of the new funding application has been completed. If the new funding application has not been received by December 31, the January payment will be reduced to 75 per cent of the previous year funded monthly amount retroactive to September 1, and continued until the new funding application is received and reviewed.
3. Only **funded students** and **funded children** enrolled on the **September count date** are eligible for funding. Special consideration for the **September count date** may be given to **school jurisdictions** experiencing exceptional growth in transportation needs.
4. 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 *Traffic Safety 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 1.14.

Section 1.30 — Metro Urban Transportation

ALLOCATION FORMULA UNDER REVIEW

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

UPDATED

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

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

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

- c) ECS **funded children** will be included in the Metro Urban Transportation funding formula with the following adjustments to the coefficients/benchmarks:
- the average elementary **school** size will be adjusted to include ECS **funded children**,
 - the walk percentage for elementary **schools** will be reduced from 0.80 to 0.75 for ECS – elementary **schools**, and
 - the eligible enrolment coefficient 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 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 education 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 enrolments will be included in the formula.
7. **UPDATED** ECS **children with disabilities/delays** who require special transportation will be funded at the ECS Special Transportation rate. Transportation funding for these children must be claimed under Section 1.33 of this Manual. ECS **children with a severe disability/delay** who qualify for Program Unit Funding cannot be included in the count of **students with severe disabilities** in the Metro Urban Transportation formula.
8. **UPDATED** Funding shall not be paid under this section for a **funded student** who is counted under Special Transportation funding (Section 1.31) or a **funded child** who is counted under Section 1.33.

9. **School jurisdictions** receiving Metro Urban Transportation funding must transport or make arrangements for the transport of **children** attending **ECS programs** at a service level that is consistent with the transportation of students under Section 51(1) of the *School Act*.
10. When a metro urban 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 1.28) funding, or Urban Transportation (Section 1.29) funding, must have approval from the **Minister**. Requests for approval should be submitted to the Financial Reporting and Accountability Branch.
11. 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 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 is currently under review and will continue for the 2009/2010 school year.

School jurisdictions may also qualify for Relative Cost of Purchasing Goods and Services Adjustment (RCPA) funding for transportation services. Please see details in Section 1.14.

Section 1.31 - Special Transportation (Grades 1-12)

ALLOCATION FORMULA

1. a) Special Transportation:

$$\text{Special Transportation Allocation} = \left(\begin{array}{c} \text{\# of students with} \\ \text{disabilities transported} \\ \text{(see Allocation Criteria 1)} \end{array} \times \begin{array}{c} \text{Applicable special} \\ \text{rate (urban or rural)} \\ \text{per student with} \\ \text{disability} \end{array} \right) +$$

- b) Weekend Transportation

$$\text{Weekend Transportation Allocation} = \begin{array}{c} \text{\# of students with disabilities} \\ \text{transported on a weekend} \end{array} \times \begin{array}{c} \text{Weekend} \\ \text{Transportation Rate} \end{array}$$

c) **Bus Modification or Purchase Allowance to Accommodate Wheelchair Passengers:**

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

ALLOCATION CRITERIA

1. **UPDATED** Urban or rural **school jurisdictions** may receive special transportation funding for resident **students with disabilities** riding on a bus designated only for the transportation of those **students with disabilities** who cannot, because of the severity of their disability/delay, use regular transportation services described in Sections 1.28, 1.29, or 1.30 of this manual.
2. **UPDATED** All **school jurisdictions** (rural, urban and metro urban) transporting ECS **children with disabilities/delays** must claim ECS Special Transportation funding under section 1.33.
3. Program or **school** location shall not be considered when determining eligibility for this funding.
4. Special Transportation funding is provided for **students with disabilities** who require special transportation between their residences or boarding places and:
 - a) the **school** of a **school jurisdiction**;
 - b) an **accredited funded private school**; or
 - c) a program at an **institution** operated and/or funded by Alberta Education:
 - i. which the **student with a disability** has been directed to attend by the **school jurisdiction** because the **school jurisdiction** does not operate a suitable program, or
 - ii. which is the closest suitable and available program offered.
5. To claim Special Transportation funding for a **student with a disability** attending an **accredited funded private school**, the **school jurisdiction** must have directed the student to attend that **school**.
6. Weekend transportation funding is provided to **school jurisdictions** when **students with disabilities** are transported on weekends between their permanent residences and their boarding places by their **parents** and are attending:
 - a) the **school** of a **school jurisdiction**; or
 - b) an **accredited funded private school**.

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

DOCUMENTATION AND REPORTING REQUIREMENTS

1. **School jurisdictions** are required to submit electronically their claims to the Business Operations and Stakeholder Support Branch by November 30. Payment is made on the basis of the submitted information, the Special Transportation Allocation Criteria and funding rates, and in accordance with the *School Act* and the *Student Transportation Regulation, A.R. 250/1998; amended A.R. 197/2000*.
UPDATED 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 Business Operations and Stakeholder Support Branch by November 30.
2. Transportation support payments for each new **school year** will be paid at 100 per cent of the previous year's funded monthly amount until review of the new funding application has been completed. If the new funding application has not been received by December 31, the January

payment will be reduced to 75 per cent of the previous year funded monthly amount retroactive to September 1 and continued until the new funding application is received and reviewed.

3. Only **funded students** enrolled on the **September count date** are eligible for funding. Special consideration on the **September count date** may be given to **school jurisdictions** experiencing exceptional growth in transportation needs.
4. **School jurisdictions** are required to retain the following information on file for a minimum of seven years and make it available for review by Alberta Education upon request. 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, and charter schools** ;
 - g) copies of current vehicle inspection certificates issued under the *Traffic Safety 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 disabilities** who require 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 1.14.
2. Funding for **parent**-provided transportation of ECS children with special needs is not provided under this section but instead is provided under either Section 1.28 (Rural Transportation) or Section 1.29 (Urban Transportation).

Section 1.32 — ECS Regular Transportation (Private Operators)

ALLOCATION FORMULA

eligible transported ECS children X Transportation Rate for private ECS operators

ALLOCATION CRITERIA

1. **Private ECS operators** with **funded children** who reside at least 2.4 kilometers from the **ECS program** in which they are enrolled and are being transported will be eligible for this funding.
2. Transportation costs incurred for field trips or other activities cannot be claimed under this funding. For **children with severe disabilities/delays**, these costs can be claimed under the Program Unit Funding (PUF).
3. A **private ECS operator** that claims ECS regular transportation funding must transport, or make arrangements for the transportation of, **funded children** attending **ECS programs**. Transportation funding cannot be claimed if the **private ECS operator** has not provided or arranged transportation or if there was no cost to the **private ECS operator** for the transportation provided.
4. If the transportation of an **eligible transported ECS child** is not done by the **private ECS operator**, then a contract or signed agreement must be in place by November 30 with the company or person(s) transporting the **eligible transported ECS child**.
5. If transportation of an **eligible transported ECS child** is done by taxi or a teacher aide, the ECS regular transportation rate shall apply.
6. To apply for ECS Regular Transportation funding, **private ECS operators** are required to submit electronically their ECS transportation claim form to the Business Operation and Stakeholder Support 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 1.28, Rural Transportation; Section 1.29, Urban Transportation; and Section 1.30, Metro Urban Transportation Block.
7. For ECS programs beginning in September, transportation funding is based on **funded child** registration information as of the **September count date**.
8. **Eligible transported ECS children** registered after the **September count date** are not eligible for regular transportation funding.
9. For ECS programs beginning after September 30, the count date for transportation will be the last **operating day** of the month in which the program begins. The Electronic ECS transportation claim form must be submitted to the Business Operations and Stakeholder Support Branch within three weeks of that date.
10. **Private ECS operators** may enter into **transportation agreements** with **school jurisdictions** for the transportation of **eligible transported ECS children** enrolled in their programs. Funding for these children will be claimed by the **school jurisdictions** providing the transportation service.
11. A **private ECS operator** providing transportation to and from an **ECS program** may charge the **parent** of an **eligible transported ECS child** a fee for the transportation service. The fee shall not exceed the total cost of the provision of ECS transportation services less the ECS transportation funding received from Alberta Education.

Section 1.33 — ECS Special Transportation (Private ECS Operators and School Jurisdictions)

UPDATED

UPDATED ALLOCATION FORMULA

ECS Special Transportation to and from School

# of transported children with disabilities/delays	X	ECS Special Transportation Rate (per round trip – max of 185 per child)
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Parent Provided ECS Children	X	ECS Regular Transportation Rate (per round trip – max of 185 per child)
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Family-Oriented ECS Programming Transportation

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

1. Special Transportation
 - a) **ECS operators** may receive ECS Special Transportation funding for ECS **children with disabilities/delays** who cannot be accommodated by regular transportation because of their disabilities and, therefore, require special transportation, such as a handi-bus.
 - b) **distance** and **school** location shall not be considered when determining eligibility for funding.
 - c) Funding will be paid based on the number of days that a **child with a disability/delay** is transported to/from the **ECS program** up to a maximum of 185 days.
2. **Family-Oriented Programming** Transportation Funding
 - a) this transportation funding is for each scheduled **family-oriented programming** session delivered by a teacher, a child development specialist, or a teacher assistant to the home of a **child with a severe disability/delay** receiving **family-oriented programming**.
 - b) transportation funding is provided for each session with a minimum of 4 sessions and a maximum of 36 sessions for each program unit **funded child**,
3. Transportation costs incurred for field trips or in-program activities cannot be claimed under this funding. For **children with severe disabilities/delays** these costs may be claimed under Program Unit Funding (Section 1.6)
4. An **ECS operator** that claims ECS Special Transportation funding must transport, or make arrangements for the transportation of **children with disabilities/delays** attending the **ECS program**. Transportation funding cannot be claimed if the **ECS operator** has not provided or arranged transportation or if no cost was incurred by the **ECS operator** to transport the children
5. If the transportation of **children with disabilities/delays** is not done by the **ECS operator**, then a contract or signed agreement must be in place by November 30 with the company or person(s) transporting the children.
6. When a **child with a disability/delay** is transported by their **parent(s)**, the ECS Regular/Parent Provided transportation funding rate will apply.

REVISED

UPDATED

7. When a **child with a disability/delay** is transported by taxi or by a teacher aide ECS Special Transportation funding may be claimed only if the decision for transporting by taxi or by aide is based on medical or safety reasons or because there are no other transportation options. Otherwise, transportation by taxi or aide will be paid at the regular transportation funding rate.

REVISED

8. For parent-provided transportation, where there is a written agreement or contract in place:
- Parents** who transport their own child(ren) require a class 5 operator's license and their own liability insurance.
 - Individuals who use their own vehicle to transport a child(ren) –other than their own child–require a class 5 operator's license and a minimum of \$2 million liability insurance.
9. To apply for ECS Special Transportation funding, **ECS operators** are required to submit their ECS Transportation claim form electronically to the Business Operation and Stakeholder Support 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 ECS Regular and ECS Special Transportation funding.
10. **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.
11. For **ECS programs** beginning in September: transportation funding is based on **funded child** registration information as of the **September count date**.
12. **Children with disabilities/delays** who are registered after the **September count date** are not eligible for special transportation funding. Transportation costs for ECS **children with severe disabilities/ delays** eligible to receive PUF may be claimed as a Program Unit expense.
13. For **ECS programs** beginning after September 30: the count date for transportation will be the last **operating day** in the month in which the program begins. The electronic ECS transportation claim form must be submitted to the Business Operations and Stakeholder Support Branch within 3 weeks of that count date.
14. An **ECS operator** providing special transportation to and from an **ECS program** may charge the **parent** of a **funded child** a fee for the transportation service. The fee shall not exceed the total cost of the provision of ECS transportation services less the ECS Special Transportation funding received from Alberta Education.
15. 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.

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

(Sections 2.1 to 2.5 – see Table of Contents)

Section 2.6 — ECS Plant Operations and Maintenance

ALLOCATION FORMULA

# of funded children	X	PO&M Rate for ECS
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ALLOCATION CRITERIA

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

Section 2.7 — ECS Administration

ALLOCATION FORMULA

Total ECS Funding	X	6%
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ALLOCATION CRITERIA

1. Funding for administration is based on 6 per cent of the total ECS funding a **private ECS operator** receives from Alberta Education for the following areas:
 - a) base instruction;
 - b) special education needs (including mild/moderate and gifted and talented, and finalized program unit funding);
 - c) transportation (special and regular); and
 - d) plant operations and maintenance.
 - e) English as a second language (ESL)
 - f) Enhanced ESL and support services for immigrant children

For ECS programs with program unit funded children, administration funding for **private ECS operators** will be adjusted based on the final PUF amount approved.

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

(Section 3.1 – refer to Section 1.2)

Section 3.2 — Designated Special Education Private Schools (DSEPS)

ALLOCATION CRITERIA

1. Funding is provided for **students with mild/moderate or severe disabilities**, who are enrolled on the **September count date** and meet Alberta Education coding criteria as outlined in the *Special Education Coding Criteria 2009/2010*.
2. In order to receive the higher instructional funding rate, the **DSEPS** must advise **parents** of the need to discuss their **child's mild/moderate disability** and programming options with their **resident board** before enrolling in the **DSEPS**. The **resident board** must retain a record of the discussion.

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

6. Funding rates for **DSEPS**:
 - a) \$10,795 per student with a **mild/moderate disability** when the **parent** has consulted with the **resident school board** (grant codes 110 and 500 and the applicable 50 code)
 - b) \$6,805 per student with a **mild/moderate disability** when **parent** enrolls student without consulting the **resident school board** (grant code 500 and applicable 50 code)
 - c) \$6,805 per **student with a severe disability**, (grant code 500 and applicable 40 code)
7. Transfer of funding between jurisdictions and **DSEPS** is not required for students who move after the **September count date**
- NEW** 8. No new or satellite DSEPS will be approved until after the completion of *Setting the Direction for Special Education* and *Inspiring Education: A Dialogue with Albertans*.

REFERENCES

[Special Education Coding Criteria 2009/2010](#)

[Standards for Special Education, Amended June 2004](#)

See Part 9, Section 9.1 Reporting Requirements in this Manual

Section 3.3 — Severe Disabilities (Including Charter Schools)

ALLOCATION FORMULA

# of approved students with severe disabilities	X	Severe disability funding rate
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ALLOCATION CRITERIA

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

- b) documentation/assessments of the student's current level of functioning in the learning environment;
 - c) **students with severe disabilities** must receive three or more of the **levels of support** identified to meet their educational needs.
 - d) a current **Individualized Program Plan (IPP)** based on *the Standards for Special Education*, (2009), which addresses the student's diagnosed needs.
7. The following **students with severe disabilities** may be claimed on the **March count** and are eligible for 50 per cent of the severe disabilities funding rate:
- a) students who move from a **school jurisdiction or an institution**, after the **September count date** to an **accredited funded private school** (including **DSEPS**), or **charter school**.
 - b) students who were not registered with any **school authority** on the **September count date** and who register in an **accredited funded private school** or a **charter school** after the **September count date**.
8. Funding must be transferred from an **accredited funded private school** or a **charter school** on a pro-rated 10 month basis for **students with severe disabilities** who transfer after the **September count date** to either a **school jurisdiction** or a different **accredited funded private school** or a **charter school**

REFERENCES

[Handbook for the Identification and Review of Students with Severe Disabilities 2009/2010](#)

[Special Education Coding Criteria 2009/2010](#)

Section 3.4 — Early Literacy

ALLOCATION FORMULA

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

1. An **accredited funded private school** may receive Early Literacy funding for programs provided for **funded students** in Grades 1 and 2.
2. In order to access funding, an **accredited funded private school** must indicate on the *Notice of Intent to Operate a Private School (NOI)*, submitted by May 31 of the previous **school year**, that it plans to provide Early Literacy programs for Grades 1 and 2.
3. **Accredited funded private schools** may use Early Literacy Funding in the following ways:
 - a) minimum of 85 per cent to hire additional human resources to support classroom teachers in giving students at risk the additional programming and attention they need.
 - b) maximum of 15 per cent to purchase early literacy resources, or to provide in-service for **parents** and for teachers, or other staff deployed as part of the **school's** Early Literacy program.
4. All students in Grades 1 and 2 who need early literacy assistance must have access to the program.
5. **Accredited funded private schools** will be required to report on the number of students served and their level of achievement. If the program objectives have been met and not all the funding was utilized, the remainder of the funding may be utilized for other programs.
6. **Accredited funded private schools** will be required to report revenues and expenditures in their audited financial statements.

(Section 3.5 to 3.10 — see Table of Contents)

Section 3.11 — Relative Cost of Purchasing Adjustment (Level 2 only*)

ALLOCATION FORMULA

$$\text{RCPA} = \left(a + b \right) \times c$$

Where

a = 20% x **private school** funding (see exclusions in Allocation Criteria #1)

b = 75% x **private school** planted operations and Maintenance funding

c = RCPA Private Schools Index Factor - see Table (min. value 1.0)

ALLOCATION CRITERIA

1. The following grants are excluded from the calculation of RCPA funding for level 2 **accredited funded private schools**: AISI, SuperNet and Plant Operations and Maintenance funding.
2. The Jurisdiction RCPA Index number is based on the spatial price index developed by Alberta Economic Development, which will be reviewed and adjusted regularly. The RCPA Adjustment Factor is determined by taking the Jurisdiction RCPA Index number as indicated in the table below and subtracting 1.0
3. The index will have a minimum value of 1.0 for all **accredited funded private schools** to ensure the **accredited funded private school** will not lose funding under the RCPA formula.
4. The City of Red Deer will have a constant index value of 1.0, and is considered the bench mark centre.

2009/2010 Private School Authorities — RCPA Index

UPDATED

authority code	Private School Authority	RCPA Index
9302	40-Mile Christian Education Society	1.000
9270	Airdrie Koinonia Christian School Society	1.055
9382	Alberta Conference of 7th Day Adventist Church	1.022
9916	Association for Christian Schooling in Calgary South	1.055
0062	Banbury Crossroads School	1.055
9106	Bearspaw Christian School Society	1.055
9407	Bethel Christian Academy Society	1.055
9272	Bosco Homes A Society For Children And Families	1.036
9632	Calgary French & International School Society	1.055
9795	Calgary Quest Children's Society	1.055
9224	Calgary Waldorf School Society	1.055
9112	Calvin Christian School Society of the Netherlands Reformed Congregations	1.000
9092	Canadian Reformed School Society of Edmonton	1.036
9078	Canadian Reformed School Society of Neerlandia	1.000

UPDATED

authority code	Private School Authority	RCPA Index
9024	Canadian University College	1.000
9294	Central Alberta Christian High School Society	1.000
9379	Clear Water Academy Foundation	1.055
9042	Coaldale Canadian Reformed School Society	1.000
0229	Concordia High School	1.036
9045	Cornerstone Christian School Society	1.000
9353	Delta West Academy Society	1.055
9127	Destiny Christian School Society	1.000
9319	Devon Christian School Society	1.036
0227	Diaspora Educational Society	1.036
0083	Eastside City Church	1.055
9352	Edison School Society	1.033
9172	Edmonton Academy Society for Learning Disabled	1.036
9269	Edmonton Islamic School Society	1.036
0116	Edmonton Khalsa School Educational Association	1.036
9263	Elves Special Needs Society	1.036
9146	Evangelical Free Church of Champion, Alberta	1.000
9107	Foothills Academy Society	1.055
0118	Headway School Society of Alberta	1.036
9421	High Level Christian Education Society	1.000
0030	Independent Baptist Christian Education Society	1.036
9342	Inner City Youth Development Association	1.036
0161	International School of Excellence (ISE)	1.055
0025	Janus Academy Society	1.055
0207	Khalsa School Calgary Educational Foundation	1.055
9211	Koinonia Christian School - Red Deer Society	1.000
9312	Lakeland Christian School Society	1.000
9314	Lighthouse Christian School Society	1.000
9336	Living Waters Christian Academy	1.036
9173	Lycee Louis Pasteur Society	1.055
0212	Maria Montessori Education Centre Ltd.	1.055
9253	Morinville Christian Fellowship	1.036
0035	Mountain View Academy Society	1.055
9337	Muslim Community Foundation of Calgary	1.055
0077	New Heights Early Learning Services Society	1.055
9250	Newell Christian School Society	1.000
9328	Olds Mountain View Christian School Association	1.002
9027	Parkland Community Living and Supports Society	1.000

UPDATED

authority code	Private School Authority	RCPA Index
0175	Phoenix Home Education Foundation	1.055
9167	Ponoka Christian School Society	1.000
9225	Progressive Academy Education Society	1.036
9942	Providence Christian School Society	1.000
9672	Renfrew Educational Services Society	1.055
9071	River Valley School Society	1.055
9230	Rundle College Society	1.055
0072	Slave Lake Koinonia Christian School Society	1.007
9018	St. Matthew Evangelical Lutheran Church of Stony Plain, Alberta	1.036
9072	Strathcona-Tweedsmuir School	1.033
0213	Tanbridge Academy	1.055
9059	Tempo School	1.036
9633	The Calgary Jewish Academy	1.055
9131	The Calgary Society for Effective Education of Learning Disabled	1.055
9938	The Canadian Reformed School Society of Calgary	1.055
0074	The Edge School For Athletes Society	1.055
9365	The Edmonton Lutheran School Society	1.036
9025	The Lacombe Christian School Society	1.000
9254	The Rimbey Christian School Society	1.000
9022	The Rocky Christian School Society	1.000
9041	The Society for Christian Education in Southern Alberta	1.000
0023	Third Academy International Ltd.	1.043
9946	Trinity Christian School Association	1.000
0016	Tween Valley Fellowship/Tween Valley Christian School	1.000
9346	Universal Educational Institute of Canada	1.036
0015	Webber Academy Foundation	1.055
9140	West Island College Society of Alberta	1.055
0141	Yellowhead Koinonia Christian School Society	1.000

*As per Accountability and Declaration Form 09AE3.0

Section 3.12 — Plant Operations and Maintenance (Level 2* Funding)

ALLOCATION FORMULA

Plant Operation and Maintenance (POM) Allocation	=	FTE Weighted Enrollment	X	POM Rate
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POM calculation is based on the following rates applied to the **FTE weighted enrollment** taken from the **Frozen Funded Head Count** of the previous year. Online students (code 620) are at 0.1 FTE for the purpose of this grant.

Grades	Rate per Weighted FTE
1 – 6	\$545.90
7 – 9	\$515.52
10 – 12	\$518.40

*as per Accountability and Declaration Form 09AE3.0

Part 4 — Federal French Funding

Section 4.1 — Federal Francophone Education (Francophone Regional Authorities)

ALLOCATION FORMULA

# FTE Francophone funded children or students	X	Funding Rate
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ALLOCATION CRITERIA

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 ECS to 12.
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 directed by **francophone regional authority** to attend another **school jurisdiction** and registered by the jurisdiction.
3. **Francophone Regional Authorities** may also include as **funded students** under this section:
 - a) 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 student.
 - b) a **funded student** they have directed to attend College Mathieu in Gravelbourg Saskatchewan.
4. A **First Nations student with status who resides on a reserve** is not eligible for funding under this section.
5. This funding for a **Francophone Regional Authorities** is based on **funded student** enrollments as of the **count date** and the hours of French instruction for the **school year** for the reported students.
FTE Francophone students/child is one who has access to French instruction for a minimum of:
 - a) 712 hours ECS to Grade 6/year
 - b) 570 hours Grade 7 to 9/year
 - c) 600 hours Grade 10 – 12/year

REVISED

6. For students/children with access to less French instruction time (see #4) the following formula must be used.

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

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

REVISED

Program	Rate
French First Language (Francophone) Education ECS to Gr. 6	To be determined
French First Language (Francophone) Education Gr. 7 to 12	To be determined

Section 4.2 — Federal French Language (School Authorities)

ALLOCATION CRITERIA

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

REVISED

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

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

7. For children/students with less French instructional hours than identified in #3, but at least the minimum hours identified in #4 use applicable rate and formula in #8 for Alternative French Language Program.
8. a) ECS – Grade 9

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

- b) Grade 10 – 12

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

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

Part 5 — Targeted Funding for Provincial Initiatives — Additional Funding

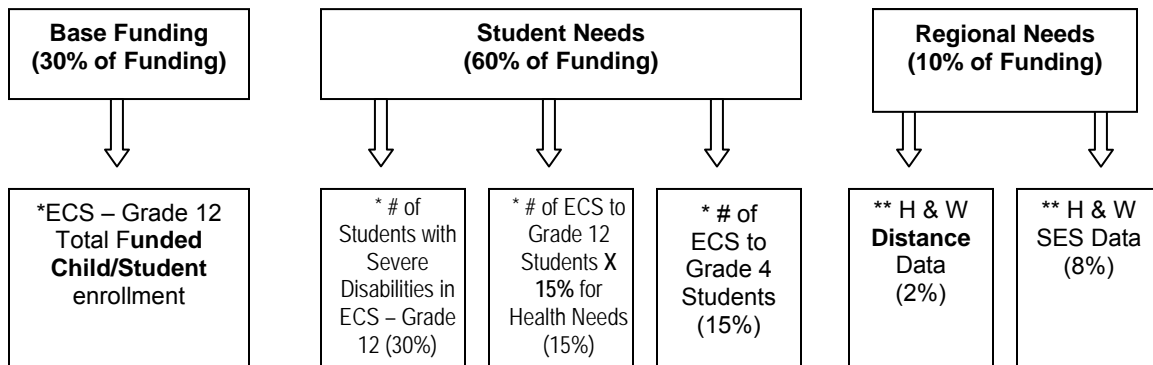
Section 5.1 — Student Health (School Authorities)

ALLOCATION CRITERIA

1. Students/Children with special health needs includes those 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. Alberta Education administers Student Health funding on behalf of the following provincial government partners – Alberta Education, Alberta Health and Wellness, and Alberta Children and Youth Services.
3. Student Health funding must be pooled and shared by the **Student Health Partnership** to provide students/children with identified special health needs with access to enhanced student health services. Students/children throughout the region must have equitable access to services regardless of their **school** program.
4. The Student Health 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.
5. Decisions on how the Student Health funding is to be utilized must be made jointly by the partners in the Student Health Partnership.
6. Alberta Education distributes Student Health funding for Student Health Partnerships through the “designated banker” **school board** identified by the Partnership to administer the Student Health funds on behalf of all partners.

- UPDATED** 7. Every **school year**, **Student Health Partnerships** must:
- a) submit a Service Plan for approval,
 - b) identify in the Service Plan, a **school board** as a “designated banker” through which they will receive and distribute their funding.
 - c) submit an Annual Report for the previous **school year** by November 30, that includes an audited financial statement.

STUDENT HEALTH FUNDING FORMULA



*Alberta Education data as of the **September count date**; based on data for ages 2 ½ to 20 years of age.

**Alberta Health and Wellness data as of March 31; based on data for ages 5 to 19 years of age.

The above model was implemented in the 2004-2005 Service Plan year. 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.

8. **Funded students**, who are registered with **school authorities** in alternative programs such as home education/**blended**, **outreach** and **online** are counted in the Student Health funding and eligible for services.

Funding for administration costs is included in the allocation.

Section 5.2 — Francophone Student Health Services (Francophone Regional Authorities)

ALLOCATION CRITERIA

1. This funding and the services provided are for students identified in 5.1 (1) and registered in francophone school programs.
2. Student Health funding is accessed by the Réseau provincial d'adaptation scolaire
3. Alberta Education administers Student Health funding.
4. Through the *Réseau*, Student Health funding must be pooled and shared provincially by the **Francophone Regional Authorities**.
5. The Student Health funding allocation may only be accessed by a **Francophone Regional authority** that is a member of the *Réseau*, once a Service Plan has been signed by all member **school board** Chairs, including the Chair of the *Réseau*'s "designated banker" **school board**; and submitted and approved.
6. Alberta Education distributes Student Health funding to the Réseau through the designated "banker" **school authority** to administer the Student Health funds on behalf of all partners.
7. Every **school year**, the *Réseau* must:
 - a) submit a Service Plan for approval by the Student Health Provincial Coordinator;

- b) submit an Annual Report for the previous **school year**, with all required components and documents;
 - c) have a designated **Francophone Regional Authority** as a “banker” through which they will receive and distribute their funding.
8. The allocation of the Student Health funding to the *Réseau* is based primarily on a per student amount.
9. funding for administration costs is not to exceed 4.5 per cent of the total allocation.

Section 5.3 — Alberta Initiative for School Improvement (School Authorities)

ALLOCATION CRITERIA

1. Funding is provided for projects that have been approved by the School Improvement Branch.
2. Alberta Education will approve multi-year projects up to a maximum of three years. However, each project's budget must be approved on an annual basis.
3. The funding allocated each year to a **school authority**, is calculated by multiplying the AISI **rate** by the **FTE** enrollment on the **September count date** of the previous **school year**.
4. Heritage Language Schools are not eligible for funding under this section.
5. 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**.
6. All AISI funds must be expended on AISI projects. Unexpended AISI funds may be transferred at the end of the AISI project to another existing or new AISI project.
7. 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. Funding for years two and three of a project will be released upon submission of the AISI Project Annual Report and approval of the project budget for that year.
8. 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.

REVISED

REFERENCES

[AISI website](#)

[Alberta Initiative for School Improvement \(AISI\) Handbook for Cycle 3, 2009-2012](#)

Section 5.4 — SuperNet Service (School Authorities)

ALLOCATION CRITERIA

- REVISED** 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.
- Examples of approved sites include **schools**, stand alone Outreach centres/schools, one **school authority** head office, and one network operation centre.
2. **School authorities** must sign a Letter of Agreement with Axia SuperNet Ltd. for all SuperNet connected sites.
3. **School authorities** must apply for SuperNet Service funding by submitting a SuperNet Service funding application (Form 09AE5.4) to Alberta Education's Stakeholder Technology Branch (STB) along with a copy of each Letter of Agreement, Schedule B and Attachment to Sch. B soon after the sites are connected to SuperNet services.
- REVISED** 4. **School authorities** must provide notification to STB of any possible changes, including additions and/or deletions to the list of connected sites. Notification timelines are as follows:
- a) one year for additions and moves
 - b) within one month of site closure for a site deletion
- If a school authority fails to notify the STB of a disconnection, the **school authority** will be responsible for the SuperNet costs incurred for the deleted SuperNet site.
5. SuperNet Service funding is provided on the basis of approved connected sites and the monthly service cost. The funding amount is determined by multiplying the number of eligible connected sites by the monthly SuperNet rate.
6. SuperNet Service funding is paid retroactively to the service activation date if the funding application is received by March 31 of the current **school year**. Funding applications received after March 31 are not eligible for retroactive funding.
7. SuperNet Service funding is calculated on a monthly basis and provided for each approved site as follows:
- a) **school jurisdictions** and **Francophone Regional Authorities** \$503.50 (100 per cent)
 - b) level 1 **accredited funded private schools** \$302.10 (60 per cent);
 - c) level 2 **accredited funded private-schools** \$352.45 (70 per cent)
 - d) **Private ECS Operators** \$251.75 (50 per cent) (payment for connection after the 1st of the month will be pro-rated).
- Note: SuperNet Service for First Nations schools are funded by Indian and Northern Affairs Canada.
8. **NETWORK HEAD-END AGGREGATION PROVISION**
- Alberta Education will provide additional SuperNet Service funding to a **school authority** 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**).
9. **MULTIPLE STAKEHOLDER SHARED FACILITY AGREEMENTS**
- When different education stakeholders are sharing the same facility and each has their own local-area network infrastructure, they are eligible to have one stakeholder (transferring stakeholder) transfer their SuperNet Service funding allocation to the other stakeholder (receiving stakeholder). This can allow one stakeholder to obtain additional services from SuperNet and provide them to both stakeholders. The procedures and considerations for this are as follows:

- a) The transferring stakeholder must have their own local area network in the shared site or they are not eligible to receive SuperNet Service funding.
- b) The transferring stakeholder will sign a transfer document provided by the 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.

REVISED

10. EXISTING HIGH-SPEED NETWORKING INFRASTRUCTURE PROVISION

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

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

NEW

REFERENCES

Guidelines outlining the criteria for SuperNet installation are available at:
<http://education.alberta.ca/admin/technology/supernet.aspx>

Section 5.5 — Small Class Size Initiative (School Jurisdictions)

ALLOCATION FORMULA

School jurisdictions will receive a 4.8 per cent increase to their 2008/2009 funding allocation.

ALLOCATION CRITERIA

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.
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.
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).

Section 5.6 — Children and Youth with Complex Needs Initiative (School Authorities) –Under Review

ALLOCATION CRITERIA

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:
 - i. is less than 20 years of age as of September 1 (there is no minimum age), and
 - ii. 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
 - iii. requires extraordinary care and services from more than one ministry or service sector, and
 - iv. 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:
 - i. do not have sufficient resources to provide the combination and level of services the child requires, or
 - ii. are prevented by mandate/policy from providing the combination and level of services the child requires.
 - c) the local case managers, service providers and family/guardian:
 - i. have met to develop an integrated service plan, and
 - ii. have determined that all local resources have been exhausted, and
 - iii. have determined that an adequate integrated service plan cannot be fully developed locally, and
 - iv. have determined that without an adequate integrated service plan the child, youth, family or public will be at risk, and
 - v. agree that the child/youth should be referred for a Regional Integrated Case Management Team Review,
 - vi. 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 Initiative funding is accessed by Regional Integrated Case Management Teams consisting of **school authorities**, Alberta Health Services, child and family services authorities, **parents** and other partners. The Team must collaboratively provide integrated case management support for the child or youth with complex needs and they must support local teams in developing integrated service plans and share accountability for results.
3. The Children and Youth with Complex Needs Initiative funding allocation may only be accessed if, and when, the **school authority**, Alberta Health Services 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 Criteria # 2). The Terms of Reference must be updated annually and submitted for approval to the Provincial Coordinator by May 15, 2009.

Decisions on how the Children and Youth with Complex Needs Initiative funding is to be utilized must be made jointly by the partners of the Regional Integrated Case Management Team. This 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, who meet the criteria for funding, must have equitable access to services.

- REVISED**
4. Alberta Education administers Children and Youth with Complex Needs Initiative funding on behalf of the following provincial government partners — Alberta Education, Alberta Children's Services, and Alberta Health and Wellness.
 5. Alberta Education distributes Children and Youth with Complex Needs Initiative funding for Regional Integrated Case Management Teams through the "designated banker" **school authority**.
 6. All other sources of funding for service delivery must be exhausted prior to accessing the Children and Youth with Complex Needs Initiative funding.
 7. 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**.
 - REVISED** 8. Funding for Children and Youth with Complex Needs Initiative is comprised of two components:
 - a) Operational Funding
Each Regional Integrated Case Management Team receives 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 percentage of the total provincial service delivery funding as follows
 - i. percentage of the total provincial population of children and youth age 0 to 19. Data is provided by Health and Wellness.
 - ii. 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.
 - iii. percentage of the total provincial number of children and youth receiving services under Family Supports for Children with Disabilities. Data is provided by Children and Youth Services.
 - iv. 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.
 9. 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

[Management of Integrated Services for Children and Youth with Complex Needs and Their Families: Guidelines for Alberta Regional Teams](#)

[Policy Framework for Services for Children and Youth with Complex Needs and Their Families \(July 2003\)](#)

Part 6 — Other Provincial Support Funding

Section 6.1 — Education Programs in Institutions (EPIs)

ALLOCATION CRITERIA

1. Funding is provided for:
 - a) education programs for **resident students of the government** who reside in an **institution** or **group home**;
 - b) **day students** who attend an EPI that is approved for **day students**.
2. **School authorities** must have approval from the Minister and a contract/agreement with Alberta Education to provide an education program to students in the **institution**.
3. Institutional funding will only be provided for eligible **resident students of the government** and **day students** who:
 - a) are in the custody under the *Corrections Act*, the *Corrections and Conditional Release Act (Canada)*, the *Youth Criminal Justice Act (Canada)* or the *Youth Justice Act*, and deemed by the **school jurisdiction** and Alberta Solicitor General staff to be unlikely to succeed in any other **school jurisdiction** education programs; or
 - b) are in the custody of a regional Child and Family Services Authority (CFSA) director, or a Designated First Nations Agency (DFNA) Chief Executive Officer or have a guardian appointed under the *Child, Youth and Family Enhancement Act* and reside in a **group home** or treatment centre and receive intensive treatment; or
 - c) require long term intensive medical care which can only be provided onsite at the hospital; or
 - d) are a **temporary resident** of a women's shelter and require protection from physical, psychological or sexual abuse.
4. Institutional **students with a severe disability** in an educational program provided by an **accredited funded private school** who have been placed in the institution by Alberta Health Services, the Alberta Solicitor General or the regional CFSA will be funded through institutional funding and are not eligible for severe disabilities funding.
5. EPIs will be funded for a 10-month **school year**. Only EPIs in Young Offender Centres will be funded for a 12-month program.
6. **School authorities** with a contract or approval to provide an EPI are required to:
 - a) ensure all eligible **institutional students** are registered with the grants code 550.
 - b) submit a budget of costs and revenues using Form 09AE6.1 to the Special Programs Branch by May 15 for the following **school year**. EPIs are expected to stay within their approved budget.
 - c) submit a letter for approval to the Special Programs Branch explaining the need for additional funds when requesting a significant change to a proposed or an approved budget.
 - d) submit an application for actual program costs and revenues using Form 09AE6.1 to School Finance Branch by October 16 of the following **school year**.
 - e) ensure actual costs reflect significant increases or decreases in student enrollment.
 - f) keep daily attendance records for all students.
 - g) Ensure that the EPI is of a comparable quality to other school programs provided by the **school authority** and is subject to the same level of planning, evaluating and reporting required by provincial and local policy.

7. For approval of a new EPI, contact Special Programs Branch. Documentation must be submitted by May 1 preceding the **school year** for which approval is being requested.
8. To maintain the confidentiality of students in Women's Shelter programs, **school authorities** are not required to submit a list of names or ASN's on the Final claim however, they should report any Base Instruction funding for these students and report this revenue on budget and final cost forms.

Note: See also Part 9, Section 9.1 Information and Reporting Requirements

Section 6.2 — Regional Educational Consulting Services

ALLOCATION CRITERIA

1. **School authorities** may only access Regional Educational Consulting Services (RECS) for **funded students/children** who meet the criteria for one of the following special needs codes:
 - a) Code 41 – Severe Cognitive Disability
 - b) Code 43 – Severe Multiple Disability
 - c) Code 44 – Severe Physical or Medical Disability
 - d) Code 45 – Deafness
 - e) Code 46 – Blindness
 - f) Code 55 – Hearing Disability
 - g) Code 56 – Visual Disability.
2. Francophone **school authorities** may access “Le Réseau provincial d'adaptation scolaire” for **funded students** meeting the criteria for any special education code/category.
3. Alberta Education will determine the funding allocation for each program based on provincial and regional needs.
4. The **school jurisdiction** designated by Alberta Education to provide regional consulting services will use RECS to provide consultation services, in-services, and assessment services to **school authorities**.
5. A rate of \$50 per hour will be charged for services provided to **school authorities** during the 2009/2010 **school year**.
6. The funding allocation is comprised of two components:
 - a) the Base Operating Funding is on-going permanent funding.
 - b) the Provincial Initiatives Funding is not permanent and may be adjusted as provincial priorities change. **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**.
7. Administration funding is included in the allocation.
8. 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

Note: see Part 9, Section 9.1 Information and Reporting Requirements.

Section 6.3 — Learning Resources Credit Allocation (School Jurisdictions and Accredited Funded Private Schools)

ALLOCATION FORMULA

# of students on September count date	X	LR Rate
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ALLOCATION CRITERIA

1. The Learning Resources Credit Allocation (LRCA) covers 25 per cent of a purchase and the **school jurisdiction** or accredited **private school** pays the remaining 75 per cent, until the LRCA is fully utilized.
2. Unless requested otherwise the LRCA will be applied automatically against purchase orders until the full credit amount is used.
3. The 2009/2010 LRCA is valid for April 1, 2009 to March 31, 2010.
4. The 25 per cent credit may be combined with the 10 per cent Early Order Discount (EOD) for orders placed with the LRC. The EOD program runs from January 1 to May 15. See the LRC website for more information.
5. **School jurisdictions** and accredited **private schools** must show the amount of LRCA utilized as 'Provincial Revenue' and also as an expenditure on the Audited Financial Statements.

Section 6.4 — Regional Consortium

ALLOCATION FORMULA

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

ALLOCATION CRITERIA

1. If the annual infrastructure expenses are less than the funding provided by Alberta Education, the consortium may transfer the surplus funds to the consortium program account. The consortium may utilize surplus funds for the delivery of professional development programs and services.
2. The consortium must ensure that it has sufficient funds in its Accumulated Surplus to cover any current year deficit.
3. Each consortium shall assign an agent **board** to provide financial services, including financial reporting, on behalf of the consortium.
4. The consortia shall submit to the School Improvement Branch by December 1, an annual report that provides program details and results achieved.

REVISED

5. The agent **board** will provide the consortium with completed Form 09AE6.4 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 31.

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

Section 6.5 — Debt Retirement (School Jurisdictions)

ALLOCATION CRITERIA

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

Section 6.6 — Fort McMurray Allowance (FMA)

ALLOCATION FORMULA

\$ 1,040 per month	X	number of eligible full-time equivalent (FTE) employees
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ALLOCATION CRITERIA

- This living allowance is only provided to the following **school jurisdictions** who have employees that live and work in the vicinity of Fort McMurray:
 - Fort McMurray Public School District No. 2833;
 - Fort McMurray Roman Catholic Separate School District No. 32;
 - Greater North Central Francophone Education Region No. 2 (Centre Communautaire Scolaire Boréal only);
 - Northland School **Division** No. 61 (Fort McKay and Anzac Schools only)
- Eligible **school jurisdictions** must distribute the FMA funding to the eligible employees only. This funding may not be used for other purposes.
- Eligible **school jurisdictions** must provide eligible employee FTE information by submitting Form 09AE6.6 to the Director of School Finance by January 31 of the **school year**.
- Payment of this funding will be based on the previous year employee FTE information until Form 09AE6.6 is received when payments will then be revised for the current school year.
- Eligible **school jurisdictions** must include a letter from their auditor with the audited financial statements confirming the financial management of these funds.
- The amount of the monthly allowance will be set annually by Treasury Board at the beginning of the fiscal year and is subject to change (i.e. it may be increased, decreased or discontinued) based on the housing cost differential in the Fort McMurray area.

REVISED

REVISED

Section 6.7 — Career and Technology Studies (CTS) Evergreening Funding (School Jurisdictions)

ALLOCATION FORMULA

$$\text{\$60,000 Base} + \left(\text{\$57} \times \text{\# of Grades 10-12 Students*} \right)$$

ALLOCATION CRITERIA

1. School must have students enrolled in grades 10, 11 or 12.
2. Allocation is for 3 years: 2008 – 2009, 2009 – 2010 and 2010 – 2011.
3. *Student count for all three years is based on the Grade 10 – 12 **Frozen Funded Head Count** from 2007 – 2008.
- NEW** 4. Eligible **school jurisdictions** must submit Form 09AE6.7 to report on their CTS Evergreening expenditures or projected expenditures. This form must be submitted to their Field Services Zone Director's office by June 30, 2009.

REFERENCES

See Part 9, Section 9.1 Information and Reporting Requirements
CTS Evergreening Funding Fact Sheet and other information can be found at:
<http://education.alberta.ca/teachers/program/cts/news.aspx>

Section 6.8 — Innovative Classroom Technology Funding (School Jurisdictions)

ALLOCATION FORMULA

$$\text{\$37} \times \text{Grade 1 to 12 Frozen Funded Head Count}$$

ALLOCATION CRITERIA

1. This grant will be allocated for 3 years — 2008 – 2009, 2009 – 2010, 2010 – 2011.
2. **Frozen Funded Head Count** from 2007 – 2008 will be used for all 3 years.

REFERENCES

<http://education.alberta.ca/admin/technology/classrooms.aspx>. About Innovative Classroom Technology

Part 7 — Capital Funding

Section 7.1 — School Facilities (School Jurisdictions)

ALLOCATION CRITERIA

1. **School jurisdictions** may receive capital funding for projects approved by Alberta Education for new and replacement schools, for preservation of existing school facilities, and for the construction, transportation, re-location and set up of modular classrooms and re-location of portables.
2. **School jurisdictions** must submit their Three Year Capital Plan by May 1. The Capital Plan should identify projects in order of priority in three categories:
 - a) leases
 - b) new, additions and replacement school facilities
 - c) preservation and upgrading of existing school facilities
3. Modular classroom requirements and the relocation of modular classrooms or portables may be requested separate from the Capital Plan Submission.
4. Funds approved for specific capital projects cannot be used for other purposes without prior approval from the **Minister**.
5. The process and requirements for approval of capital projects is currently under review. **School jurisdictions** will be informed of the funding details as they become available.

REVISED

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

ALLOCATION FORMULA

1. The IMR funding formula is based on the following components:
 - 50 per cent enrollment; 24 per cent age of the building ;21 per cent eligible school space; 3 per cent geographic location (RCPA) and 2 per cent other factors.
2. The enrollment number for IMR is based on the **FTE weighted enrollment** taken from the **Frozen Funded Head Count** of the previous year. On-line students (code 620) are at 0.1 FTE for the purpose of this grant.

ALLOCATION CRITERIA

1. IMR funding may only be used for the purpose for which it is intended.
2. **School jurisdictions** may use the funding to:
 - a) ensure school facilities meet all regulatory requirements, particularly as they 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 education needs.
 - d) replace or upgrade building components to improve energy conservation and efficiency to achieve cost savings as a result.
3. **School jurisdictions** will be advised of their allocation by the School Finance Branch.

Part 8 — Payments to School Authorities

Section 8.1 School Jurisdiction Funding Rates

School Jurisdiction Funding Rates		2008/2009	2009/2010
For 2009/2010, Base Instruction and Class Size funding rates are increased by 5.99%. Transportation and Plant Operations and Maintenance rates are increased by 3.0%. Other funding rates are increased by 1.0%. Severe Disabilities, Stabilization, SuperNet, CTS Evergreening, Innovative Classrooms remain the same.			
Alberta Initiative for School Improvement (AISi) (Maximum per registered FTE child/student)		\$138	\$139.40
UPDATED Base Instruction:	ECS (per funded child)	\$2,848.50	\$3,019.12
	Grades 1 to 9 (per funded student)	\$5,697	\$6,038.25
	Grades 10 to 12 (per CEU)	\$162.77	\$172.52
CTS Evergreening		per formula	
Children and Youth with Complex Needs		per formula	
Daily Physical Activity (per eligible Grades 1-9 school)		\$1,099	\$1,110
ECS Mild/Moderate Disabilities/Delays, Gifted and Talented (per eligible funded child)		\$2,413	\$2,438
ECS Program Unit Funding (PUF) Maximum per eligible funded child Maximum for each additional funded child in a unit		\$24,316	\$24,560
		\$6,033	\$6,094
Educational Programs in Institutions		net cost of program for eligible students	
English as a Second Language (per eligible FTE funded child/student)		\$1,143	\$1,155
Enhanced ESL/Francisation and Support Services for Immigrant Students (per eligible FTE funded child/student)		\$400	\$404
Enrollment Decline: Year-to-year decline School Jurisdiction decline rate > 1.5% (per FTE funded child/student) School decline rate > 4% (per FTE funded child/student)		\$4,170	\$4,212
		\$618	\$625

School Jurisdiction Funding Rates		2008/2009	2009/2010
	Enrollment Growth: Year-to-year growth		
	School Jurisdiction growth rate > 4% (per FTE funded child/student)	\$618	\$625
	School growth rate > 7% (per FTE funded child/student)	\$618	\$625
	First Nations, Métis and Inuit Education (per eligible FTE funded child/student)	\$1,143	\$1,155
	Francisation (per eligible FTE funded child/student)	\$1,143	\$1,155
	Francophone Equivalency Access (per eligible funded student)	\$605	\$612
	Francophone Student Health Services	per formula	
UPDATED	Fuel Price Contingency	Discontinued	
UPDATED	Home Education (per eligible funded student) Plus 50% of the cost of ADLC courses for Gr. 7-12 to a maximum of: Plus additional funding for Grades 1 –6 ADLC courses	\$1,425 \$1,425 per formula -see Section 1.4	\$1,510.35 \$1,510.35
	Hutterite Colony Schools (per colony school)	\$11,202	\$11,315
	Innovative Classroom Technology (per 2007/2008 Frozen Funded Head Count)	\$37	\$37
	Intra-Jurisdiction Distance (per km of eligible distance)	\$1.14	\$1.15
	Learning Resources Credit (per registered student)	\$11.95	\$12.07
	Northern Allowance Lower Zone (per FTE funded enrollment) Intermediate Zone (per FTE funded enrollment) Upper Zone (per FTE funded enrollment)	\$457 \$685 \$1,029	\$462 \$692 \$1,040
UPDATED	Outreach : Amount per approved Outreach program	\$58,249	\$61,738
	Plant Operations & Maintenance Gr. K-6 (per FTE funded child/student) per formula Gr. 7-9 (per FTE funded student) per formula Gr. 10-12 (per FTE funded student) per formula	\$757 \$715 \$719	\$779.71 \$736.45 \$740.57
	Regional Consortium (per consortium)	\$186,359	\$188,223
	Regional Educational Consulting Services	per approved allocation	

School Jurisdiction Funding Rates			2008/2009	2009/2010
Relative Cost of Purchasing Goods and Services Adjustment (RCPA) (20% of total Education funding except Prov. Initiatives and Transportation) (47% of Transportation and Boarding funding from Education) (75% of Plant Operations and Maintenance funding)			per jurisdiction rate per jurisdiction rate per jurisdiction rate	
Severe Disabilities (per funded student based on severe profile)			\$16,465	\$16,465
Small Board Administration Charter School (per school) School jurisdiction FTE funded enrollment < 2000 School jurisdiction FTE funded enrollment > 2000 but < 3000			per formula (see Section 1.20) \$457,023 \$461,594 sliding scale reducing to zero	
Small Class Size Initiative			per formula	
Small Schools by Necessity: Base Allocation Schools with ≤ 150 FTE funded children/students Schools with > 150 but < 226 FTE funded children/students			\$85,693	\$86,550
Small Schools by Necessity: Variable Allocation			sliding scale reducing to zero	
School Type	Peak Enrollment	Enrollment Limit		
K – 3	40	80	\$571	\$577
K – 6	80	150	\$1,601	\$1,618
K – 9	80	220	\$1,829	\$1,848
K – 12	80	290	\$2,857	\$2,886
Socio-Economic Status (per eligible FTE funded child/student)			\$457	\$462
Stabilization (to ensure a school jurisdiction receives identical funding under new funding framework compared to the old framework)			Allocation for 2008/2009 plus any enrollment adjustment	
Student Health Initiative			per formula	
SuperNet Services (max. per month per approved site)			\$503.50	\$503.50

School Jurisdictions Funding Rates							2008/2009	2009/2010		
TRANSPORTATION FUNDING:										
1. Urban Transportation										
10,000-19,999 population (per eligible passenger/transported child)							\$611	\$629		
20,000-29,999 population (per eligible passenger/transported child)							\$566	\$583		
30,000 + population (per eligible passenger//transported child)							\$522	\$538		
ECS Regular / Parent-provided Transportation (including children with disability/delay)							\$522	\$538		
Special (per eligible funded student with a disability)							\$2,773	\$2,857		
ECS Special (per round trip/child with a disability/delay -max. of 185 trips)							\$14.99	\$15.44		
Weekend (per eligible funded student)							\$4,515	\$4,650		
Boarding (per eligible funded student)							\$4,057	\$4,179		
Inter-school Transportation (per km for two-way distance between schools for eligible programs)							\$0.85	\$0.88		
2. Metro Urban Transportation										
Regular (per expected eligible passenger)							\$522	\$538		
ECS Regular / Parent-provided Transportation (including children with disability/delay)							\$522	\$538		
Special (per funded student based on severe profile)							\$2,773	\$2,857		
ECS Special (per round trip/child with a disability/delay -max. of 185 trips)							\$14.99	\$15.44		
3. Rural Transportation										
Regular (per eligible passenger)							formula based using grid below			
Distance (Km)	2.4-5.9	6-9.9	10-13.9	14-17.9	18-25.9	26-37.9	38+			
Rate	\$10.37	\$15.18	\$18.16	\$20.88	\$25.12	\$26.53	\$27.89			
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	1.31-1.45	1.46-3.01	3.02+
0-700	\$636	\$726	\$790	\$806	\$814	\$829	\$965	\$1,078	\$1,457	\$1,702
701 -1400	\$636	\$702	\$780	\$798	\$803	\$820	\$945	\$1,059	\$1,324	\$1,702
1401 – 2100	\$636	\$694	\$775	\$790	\$793	\$814	\$937	\$1,046	\$1,279	\$1,702
2101 – 2800	\$636	\$658	\$769	\$778	\$770	\$811	\$908	\$1,041	\$1,139	\$1,622
2801 – 3500	\$636	\$655	\$750	\$767	\$768	\$805	\$850	\$956	-	-
3501 – 4200	\$636	\$647	\$721	\$756	\$759	\$796	\$843	\$933	-	-
4201 – 4900	\$629	\$636	\$676	\$695	\$756	\$796	\$836	-	-	-
4901 – 5600	\$629	\$629	\$637	\$647	\$647	\$740	\$826	-	-	-
5601 – 6300	\$629	\$629	\$629	\$647	\$647	\$675	-	-	-	-
6301 +	\$629	\$629	\$629	\$629	\$629	-	-	-	-	-
Special (per eligible funded student with a disability)							\$5,547	\$5,714		
ECS Special (per round trip/child with a disability/delay -max. of 185 trips)							\$14.99	\$15.44		
ECS Parent-provided Transportation (including children with disability/delay)							\$522	\$538		
Weekend (per eligible funded student)							\$4,515	\$4,650		
Inter-School Transportation (per km for two-way distance between schools for eligible programs)							\$0.85	\$0.88		
Boarding (per eligible funded student)							\$4,057	\$4,179		

Section 8.2 — Private ECS Operators

ECS Funding for Private ECS Operators and Accredited Funded Private Schools with ECS Programs			
		2008/2009	2009/2010
UPDATED	For 2009/2010, the Base funding rate is increased by 5.09% . Transportation and Plant Operations and Maintenance rates are increased by 3%. Other funding rates are increased by 1%. SuperNet and Portable Classrooms funding remain the same.		
	Alberta Initiative for School Improvement (AISI) (maximum per registered child)	\$69	\$69.70
UPDATED	ECS Administration (percentage based on enrollments of <2000 FTE funded children)	6% of ECS funding per section 2.7	
	ECS Base Instruction Funding (per funded child)	\$2,848.50	\$2,993.50
UPDATED	ECS Regular Transportation (per eligible transported child) Also Parent-provided ECS Reg. Transportation (per child with a disability/delay)	\$522	\$538
	ECS Special Transportation (per round trip/per child with a disability/delay - max of 185 trips)	\$14.99	\$15.44
	English as a Second Language (ESL) (per eligible funded child)	\$571.50	\$577.50
	Enhanced ESL and Support Services for Immigrant Children (per eligible funded child)	\$200	\$202
	Mild/Moderate Disabilities/Delays, Gifted and Talented (per eligible funded child)	\$2,413	\$2,438
	Plant Operations and Maintenance (per funded child)	\$379	\$389.86
	Portable Classrooms for ECS Operators (per month plus GST)	\$100	\$100
	Program Unit Funding Maximum per eligible funded child	\$24,316	\$24,560
UPDATED	Maximum for each additional funded child in a unit	\$6,033	\$6,094
	SuperNet Service Funding (maximum per month per approved site)	\$251.75	\$251.75

Section 8.3 — Accredited Funded Private Schools

Accredited-Funded Private Schools Funding		2009/2010 Level 1*	2009/2010 Level 2*
UPDATED	For 2009/2010, the Base Instruction rate is increased by 5.09% . The Plant Operations and Maintenance rate is increased by 3%. Other funding rates are increased by 1%. Severe Disabilities and SuperNet rates remain the same.		
	Alberta Initiative for School Improvement (AISI) (maximum per registered student)	\$83.83	\$97.58
UPDATED	Base Instruction Funding Grades 1 – 9 (per funded student)	\$3,592.00	\$4,191.00
	Grades 10 – 12 (per CEU - max of 60 CEUs per funded student per year)	\$102.63	\$119.74
UPDATED	Daily Physical Activity (per eligible Grades 1-9 school)	\$666.60	\$777
	Designated Special Education Private Schools (DSEPS) Funding rate for students with a mild or moderate disability whose parents <u>consulted</u> with their resident school board prior to placement in the DSEPS (coded as 110). Funding rate for students with a mild or moderate disability whose parents <u>did not consult</u> 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 .	\$10,811 \$6,821	\$10,811 \$6,821
UPDATED	Early Literacy (per funded student in Grades 1 and 2)	\$156.50	\$156.50
	Enhanced ESL and Support Services for Immigrant Students (per eligible FTE funded student)	\$242.40	\$282.80
UPDATED	English as a Second Language (ESL) (per eligible FTE funded student)	\$693	\$808.50
	First Nations, Metis, and Inuit (per eligible FTE funded student)	\$0.00	\$808.50
UPDATED	Home Education (per eligible funded student) 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. See section 3.4	\$1,497.53 \$1,497.53	\$1,497.53 \$1,497.53
	Institutional Programs	per formula – net cost of program	
UPDATED	Learning Resources Credit (per registered student)	\$12.07	\$12.07
	Northern Allowance (per FTE Funded Student)	Lower Zone Intermediate Zone Upper Zone	\$0.00 \$0.00 \$0.00
UPDATED	Plant Operations and Maintenance (per FTE Funded Student)	Grade 1 - 6 Grade 7 - 9 Grade 10 - 12	\$323.40 \$484.80 \$728
	Relative Cost of Purchasing Adjustment (RCPA)	\$0.00	\$545.90 \$515.52 \$518.40
UPDATED	Severe Disabilities Funding (per eligible funded student)	\$16,465	per formula \$16,465
	SuperNet Service Funding (maximum per month per approved site)	\$302.10	\$352.45

School Jurisdictions Funding Rates							2008/2009	2009/2010		
TRANSPORTATION FUNDING:										
1. Urban Transportation										
10,000-19,999 population (per eligible passenger/transported child)							\$611	\$629		
20,000-29,999 population (per eligible passenger/transported child)							\$566	\$583		
30,000 + population (per eligible passenger//transported child)							\$522	\$538		
ECS Regular / Parent-provided Transportation (including children with disability/delay)							\$522	\$538		
Special (per eligible funded student with a disability)							\$2,773	\$2,857		
ECS Special (per round trip/ child with a disability/delay -max. of 185 trips)							\$14.99	\$15.44		
Weekend (per eligible funded student)							\$4,515	\$4,650		
Boarding (per eligible funded student)							\$4,057	\$4,179		
Inter-school Transportation (per km for two-way distance between schools for eligible programs)							\$0.85	\$0.88		
2. Metro Urban Transportation										
Regular (per expected eligible passenger)							\$522	\$538		
ECS Regular / Parent-provided Transportation (including children with disability/delay)							\$522	\$538		
Special (per funded student based on severe profile)							\$2,773	\$2,857		
ECS Special (per round trip/ child with a disability/delay -max. of 185 trips)							\$14.99	\$15.44		
3. Rural Transportation										
Regular (per eligible passenger)							formula based using grid below			
Distance (Km)	2.4-5.9	6-9.9	10-13.9	14-17.9	18-25.9	26-37.9	38+			
Rate	\$10.37	\$15.18	\$18.16	\$20.88	\$25.12	\$26.53	\$27.89			
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	1.31-1.45	1.46-3.01	3.02+
0-700	\$636	\$726	\$790	\$806	\$814	\$829	\$965	\$1,078	\$1,457	\$1,702
701 -1400	\$636	\$702	\$780	\$798	\$803	\$820	\$945	\$1,059	\$1,324	\$1,702
1401 – 2100	\$636	\$694	\$775	\$790	\$793	\$814	\$937	\$1,046	\$1,279	\$1,702
2101 – 2800	\$636	\$658	\$769	\$778	\$770	\$811	\$908	\$1,041	\$1,139	\$1,622
2801 – 3500	\$636	\$655	\$750	\$767	\$768	\$805	\$850	\$956	-	-
3501 – 4200	\$636	\$647	\$721	\$756	\$759	\$796	\$843	\$933	-	-
4201 – 4900	\$629	\$636	\$676	\$695	\$756	\$796	\$836	-	-	-
4901 – 5600	\$629	\$629	\$637	\$647	\$647	\$740	\$826	-	-	-
5601 – 6300	\$629	\$629	\$629	\$647	\$647	\$675	-	-	-	-
6301 +	\$629	\$629	\$629	\$629	\$629	-	-	-	-	-
Special (per eligible funded student with a disability)							\$5,547	\$5,714		
ECS Special (per round trip/ child with a disability/delay -max. of 185 trips)							\$14.99	\$15.44		
ECS Parent-provided Transportation (including children with disability/delay)							\$522	\$538		
Weekend (per eligible funded student)							\$4,515	\$4,650		
Inter-School Transportation (per km for two-way distance between schools for eligible programs)							\$0.85	\$0.88		
Boarding (per eligible funded student)							\$4,057	\$4,179		

School Jurisdictions Funding Rates							2008/2009	2009/2010		
TRANSPORTATION FUNDING:										
1. Urban Transportation										
10,000-19,999 population (per eligible passenger/transported child)							\$611	\$629		
20,000-29,999 population (per eligible passenger/transported child)							\$566	\$583		
30,000 + population (per eligible passenger//transported child)							\$522	\$538		
ECS Regular / Parent-provided Transportation (including children with disability/delay)							\$522	\$538		
Special (per eligible funded student with a disability)							\$2,773	\$2,857		
ECS Special (per round trip/child with a disability/delay -max. of 185 trips)							\$14.99	\$15.44		
Weekend (per eligible funded student)							\$4,515	\$4,650		
Boarding (per eligible funded student)							\$4,057	\$4,179		
Inter-school Transportation (per km for two-way distance between schools for eligible programs)							\$0.85	\$0.88		
2. Metro Urban Transportation										
Regular (per expected eligible passenger)							\$522	\$538		
ECS Regular / Parent-provided Transportation (including children with disability/delay)							\$522	\$538		
Special (per funded student based on severe profile)							\$2,773	\$2,857		
ECS Special (per round trip/child with a disability/delay -max. of 185 trips)							\$14.99	\$15.44		
3. Rural Transportation										
Regular (per eligible passenger)							formula based using grid below			
Distance (Km)	2.4-5.9	6-9.9	10-13.9	14-17.9	18-25.9	26-37.9	38+			
Rate	\$10.37	\$15.18	\$18.16	\$20.88	\$25.12	\$26.53	\$27.89			
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	1.31-1.45	1.46-3.01	3.02+
0-700	\$636	\$726	\$790	\$806	\$814	\$829	\$965	\$1,078	\$1,457	\$1,702
701 -1400	\$636	\$702	\$780	\$798	\$803	\$820	\$945	\$1,059	\$1,324	\$1,702
1401 – 2100	\$636	\$694	\$775	\$790	\$793	\$814	\$937	\$1,046	\$1,279	\$1,702
2101 – 2800	\$636	\$658	\$769	\$778	\$770	\$811	\$908	\$1,041	\$1,139	\$1,622
2801 – 3500	\$636	\$655	\$750	\$767	\$768	\$805	\$850	\$956	-	-
3501 – 4200	\$636	\$647	\$721	\$756	\$759	\$796	\$843	\$933	-	-
4201 – 4900	\$629	\$636	\$676	\$695	\$756	\$796	\$836	-	-	-
4901 – 5600	\$629	\$629	\$637	\$647	\$647	\$740	\$826	-	-	-
5601 – 6300	\$629	\$629	\$629	\$647	\$647	\$675	-	-	-	-
6301 +	\$629	\$629	\$629	\$629	\$629	-	-	-	-	-
Special (per eligible funded student with a disability)							\$5,547	\$5,714		
ECS Special (per round trip/child with a disability/delay -max. of 185 trips)							\$14.99	\$15.44		
ECS Parent-provided Transportation (including children with disability/delay)							\$522	\$538		
Weekend (per eligible funded student)							\$4,515	\$4,650		
Inter-School Transportation (per km for two-way distance between schools for eligible programs)							\$0.85	\$0.88		
Boarding (per eligible funded student)							\$4,057	\$4,179		

Section 8.2 — Private ECS Operators

ECS Funding for Private ECS Operators and Accredited Funded Private Schools with ECS Programs			
		2008/2009	2009/2010
UPDATED	For 2009/2010, the Base funding rate is increased by 5.09% . Transportation and Plant Operations and Maintenance rates are increased by 3%. Other funding rates are increased by 1%. SuperNet and Portable Classrooms funding remain the same.		
	Alberta Initiative for School Improvement (AISi) (maximum per registered child)	\$69	\$69.70
UPDATED	ECS Administration (percentage based on enrollments of <2000 FTE funded children)	6% of ECS funding per section 2.7	
	ECS Base Instruction Funding (per funded child)	\$2,848.50	\$2,993.50
UPDATED	ECS Regular Transportation (per eligible transported child) Also Parent-provided ECS Reg. Transportation (per child with a disability/delay)	\$522	\$538
	ECS Special Transportation (per round trip/per child with a disability/delay - max of 185 trips)	\$14.99	\$15.44
	English as a Second Language (ESL) (per eligible funded child)	\$571.50	\$577.50
	Enhanced ESL and Support Services for Immigrant Children (per eligible funded child)	\$200	\$202
	Mild/Moderate Disabilities/Delays, Gifted and Talented (per eligible funded child)	\$2,413	\$2,438
	Plant Operations and Maintenance (per funded child)	\$379	\$389.86
	Portable Classrooms for ECS Operators (per month plus GST)	\$100	\$100
	Program Unit Funding Maximum per eligible funded child	\$24,316	\$24,560
UPDATED	Maximum for each additional funded child in a unit	\$6,033	\$6,094
	SuperNet Service Funding (maximum per month per approved site)	\$251.75	\$251.75

Section 8.3 — Accredited Funded Private Schools

Accredited-Funded Private Schools Funding		2009/2010 Level 1*	2009/2010 Level 2*
UPDATED	For 2009/2010, the Base Instruction rate is increased by 5.09% . The Plant Operations and Maintenance rate is increased by 3%. Other funding rates are increased by 1%. Severe Disabilities and SuperNet rates remain the same.		
	Alberta Initiative for School Improvement (AISI) (maximum per registered student)	\$83.83	\$97.58
UPDATED	Base Instruction Funding Grades 1 – 9 (per funded student)	\$3,592.00	\$4,191.00
	Grades 10 – 12 (per CEU - max of 60 CEUs per funded student per year)	\$102.63	\$119.74
UPDATED	Daily Physical Activity (per eligible Grades 1-9 school)	\$666.60	\$777
	Designated Special Education Private Schools (DSEPS) Funding rate for students with a mild or moderate disability whose parents <u>consulted</u> with their resident school board prior to placement in the DSEPS (coded as 110). Funding rate for students with a mild or moderate disability whose parents <u>did not consult</u> 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 .	\$10,811 \$6,821	\$10,811 \$6,821
UPDATED	Early Literacy (per funded student in Grades 1 and 2)	\$156.50	\$156.50
	Enhanced ESL and Support Services for Immigrant Students (per eligible FTE funded student)	\$242.40	\$282.80
UPDATED	English as a Second Language (ESL) (per eligible FTE funded student)	\$693	\$808.50
	First Nations, Metis, and Inuit (per eligible FTE funded student)	\$0.00	\$808.50
UPDATED	Home Education (per eligible funded student) 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. See section 3.4	\$1,497.53 \$1,497.53	\$1,497.53 \$1,497.53
	Institutional Programs	per formula – net cost of program	
UPDATED	Learning Resources Credit (per registered student)	\$12.07	\$12.07
	Northern Allowance (per FTE Funded Student)	Lower Zone Intermediate Zone Upper Zone	\$0.00 \$0.00 \$0.00
UPDATED	Plant Operations and Maintenance (per FTE Funded Student)	Grade 1 - 6 Grade 7 - 9 Grade 10 - 12	\$323.40 \$484.80 \$728
	Relative Cost of Purchasing Adjustment (RCPA)	\$0.00	\$545.90 \$515.52 \$518.40
UPDATED	Severe Disabilities Funding (per eligible funded student)	\$0.00	per formula
	SuperNet Service Funding (maximum per month per approved site)	\$16,465	\$16,465
UPDATED		\$302.10	\$352.45

Payment Schedules

Section 8.4 — School Jurisdictions

PART 1 – School Jurisdiction Funding

Sections 1.1 to 1.11, 1.13 to 1.33, 5.3, 5.5, 6.1, 6.2, and 6.6

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.

Section 1.12 – Daily Physical Activity

- September – 100 per cent based on prior year frozen funded head count
- June – adjustment based on current year frozen funded head count

Section 6.7 – CTS Evergreening

- September – 100 per cent based on submission of the Report on the prior year.

Section 6.8 – Innovative Classroom Technology Funding

- September – 100 per cent

Alberta School Foundation Fund (ASFF)

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

Opted-out **boards** will receive a monthly advance on their ASFF payment from Alberta Education and on their local education property tax requisition entitlement. These **school boards** are required to re-pay the advance on their local education property tax requisition by the last banking day in the months of March, June, September and December. Interest will be applied to 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 cent per month, with the exception of January and August – which will be at 8.35 per cent and the month of March. An initial payment of 5 per cent will be processed in early March and an additional payment will be made by March 31. If this additional payment does not equal 3.33 per cent, then the difference will be either deducted/added prior to the end of the current **school year**, based on the prior approval of the Assistant Deputy Minister, Strategic Services.

Payment Receipt Dates

Sept. 15, 2009	Jan. 15, 2010	Apr. 15, 2010	Aug. 16, 2010
Oct. 15, 2009	Feb. 16, 2010	May. 17, 2010	
Nov. 16, 2009	Mar. 12, 2010	Jun. 15, 2010	
Dec. 15, 2009	Mar. 31, 2010	Jul. 15, 2010	

- Advances will be calculated using the most recent information on **funded children/students**, other statistics such as **CEU** estimates, and the current year rates.

- Adjustments to payments based on estimates will be made when Alberta Education receives actual enrollment data.
- In all cases, when funding is adjusted during the school year, the payment system will determine the amount owing to date, the advances previously paid, and the balance owing to adjust the allocation to the correct amount.

Funding Reduction for the 2009/2010 Government Fiscal Year:

- As part of government's fiscal correction in the 2009/2010 government fiscal year ending March 31, 2010, a reduction in General Revenue grant funding for Operating Support to School Boards will be applied for the seven month period September 2009 through March 2010, as calculated below:

UPDATED

- (A) = Total Accumulated Operating Surplus (excluding capital reserves) as reported in the 2007/2008 Audited Financial Statements
 (B) = Total Expense as reported in the 2007/2008 Audited Financial Statements X 3.25%
 (C) = Total Funding Reduction for the 7 month period = [(A) minus (B)] X 12.6485%
 (D) = Monthly funding reduction amount applied September 2009 through March 2010 – (C) divided by 7

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, Section 5.2 Francophone Student Health Services

On approval of Service Plan



58.33% advance

March/April



100% less previous payment

Section 5.4 SuperNet Service Funding

September or upon approval of application



Pro-rated basis to March 31

April or upon approval of application



Pro-rated basis to August 31

Section 5.6 Children and Youth with Complex Needs

Under Review

PART 6 Other Provincial Support

Section 6.4 Regional Consortium Funding

September	⇔ 70%
March/April*	⇔ 100% less previous payment
*Payment is contingent upon receipt of the previous year's Statement of Revenues and Expenses.	

Section 6.5 Debt Retirement

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

PART 7 – Infrastructure, Maintenance, and Renewal (IMR)

Section 7.2

September	⇔ 45%
By April 30	⇔ 90% less previous payment
Upon Receipt of Statement of Actual Costs	⇔ 10%

REVISED

Section 8.5 – Private ECS Operators

PART 2 – Early Childhood Services (ECS) Funding

The funding provided by Alberta Education to **Private ECS operators** is 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, 2.4 to 2.7 and 5.3.

The "Notice of Intent to Operate (NOI)" must be received before the first payment is made.

September	⇔ 40% advance* based on enrollment estimate on NOI
January	⇔ 70% less previous payment** based on current year September count date enrollment
April	⇔ 100% less previous payments

*Any ECS program with 13 or more mild to moderate children in the prior school year will receive an advance of mild to moderate funding based on last year's child enrollment.

** All ECS programs with mild to moderate children will receive mild to moderate funding based on their current year **September count date** enrollment count.

Note: With the approval of the Assistant Deputy Minister, Strategic Services, a March payment may be made up to 90 per cent 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 – Designated Sp. Ed. ECS programs	⇔ 40% advance based on the previous year approved PUF budget amount.
Upon approval of written request to School Finance – regular ECS programs	⇔ 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 per cent less previous payment.

Payments to **private ECS operators** will be received in the last week of the month (based on electronic deposit)

Sections 1.32 and 1.33 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%
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PART 5 – Provincial Priority Targeted Funding

Section 5.4 SuperNet Service Funding

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

Section 8.6 — Accredited Funded Private Schools

PART 3 – Accredited Funded Private Schools Funding

The funding provided by Alberta Education to **accredited-funded private schools** is released at set times provided all conditions and requirements have been met.

(Grades 1 – 9) Sections, 3.1 to 3.5, 3.7 to 3.12 and 5.3 (as applicable)

Advance payments will be made based on 2008/2009 enrollments and course information and 2009/2010 rates.

All payments in January or later will be based on 2009/2010 enrollments.

September	⇔	40% advance based on last year's enrollment
January	⇔	58.33% less previous payment
March	⇔	70% less previous payments
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 per cent less previous payments.

Section 3.6 Daily Physical Activity

- September — 100% based on prior year frozen funded head count
- June — adjustment based on current year frozen funded head count

Section 3.1 Base Instruction (Grades 10 – 12)

September	⇔	40% advance based on last year's CEUs
March	⇔	70% 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 per cent 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	⇔	Pro-rated basis to March 31
April or upon approval of application	⇔	Pro-rated basis to August 31

PART 6 – Other Provincial Support

Section 6.1 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

Section 8.7 — Enrollment Counts

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 Client Relationship Services.

CONDITIONS

UPDATED

1. All ECS children and all students in Grades 1 to 12 who are enrolled and attending a **school** on the **September count date** of the **school year** will be counted at the **school** they are attending on that date. Enrollment records must be kept on file in the **school authority** or **school** that will substantiate the **September count date** ECS child/student enrollment data submitted to Client Relationship Services. Students and ECS children enrolled after the **September count date** will not be counted for funding purposes.
2. A **school authority** may count a student who was not physically in attendance on the **September count date** if the student was enrolled and in attendance either in the month of September of the current school year or in the last week of June of the previous school year, and
 - a) who returned to **school** within 15 calendar days of the **September count date** or
 - b) who was referred to the attendance board (letter on file)
3. A **school authority** may count a student who was physically in attendance at an **Institution** on the **September count date** if the student was enrolled and in attendance with the **school authority** prior to the **September count date** and returned to the **school** within 30 calendar days after the **September count date**. In the event that a priority school conflict occurs, and if the requirements of Condition #3 are met, the decision will be made in favor of the **school authority**.
4. A **funded child/student** who was not physically in attendance in any **school authority** on the **September count date** but was in attendance in a **school authority** prior to the **September count date**, and then changed to a different **school authority** during the **September 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 **September count date**.
5. **Funded children/students** who are receiving their education in a **home education program** provided by their **parents** will be counted by the supervising **associate board** or **associate accredited funded private school** where the student is enrolled on the **September count date**.
6. **School jurisdictions** or **funded private schools** offering year round education to **funded students** in Grades 1 to 9 will use **September count dates** determined by School Finance on an individual basis to ensure fair and equitable funding for the students they are educating.

7. A priority **school** conflict (PSC) occurs when more than one **school** claims the **funded child/student** on the **September count date**. In the situation that more than one **school** is claiming the same **funded child/student** for funding purposes, the priority **school** is the **school** in which a **funded child/student** is deemed to have been enrolled and in attendance on the **September count date**.
8. Priority **school** conflicts must be resolved before a **school authority** is entitled to receive funding for a **funded child/student**. When priority **school** conflicts occur, **school authorities** should make every effort to resolve them as they have first-hand knowledge of the instruction the student is receiving and are in the best position to determine a fair and equitable solution.
9. If **school authorities** cannot resolve a priority **school** conflict, they should forward supporting documentation as follows to the School Finance Branch by May 15 for resolution. If School Finance must resolve the conflict, only Base Instruction funding will be provided.

REVISED

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.
- In the event of a PSC involving a PUF child, the decision will be in favor of the **school authority** that submitted the PUF application.
- If more than one **school authority** substantiates enrollment on the **September count date**, the PSC will be resolved in favor of the authority that provided the most programming

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 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.

In resolving priority school conflicts, School Finance will determine the priority **school** as follows:

- a) The **school** where the **funded student** was enrolled, and in attendance, on the **September count date**;
- b) If the **funded student** was enrolled, and in attendance, in two or more **school authorities** on the **September 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 per cent of the Base Instruction rate applicable to each **school authority**.

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

10. Course conflicts (Grades 10 –12)

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

Part 9 — Additional Information and Reporting Requirements

Section 9.1 — Information and Reporting Requirements

Accredited Funded Private Schools

1. To receive funding, an **accredited funded private school** must have seven or more full-time equivalent students enrolled from two or more families who continue to be enrolled in **school**. The seven or more full-time equivalent 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.
2. 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**.

Level 1 – the accountabilities ascribed to this accredited funded private school authority will continue to be those used by Alberta Education during the 2007/2008 school year and eligible funding allocations will be at the level 1 funding rates (60%) as outlined in the *2009/2010 Funding Manual*.

Level 2 – the accountabilities ascribed to this accredited funded private school authority will include accountabilities that are part of the provincial accountability program. Eligible funding allocations will be at level 2 funding rates (70%) as outlined in the *2009/2010 Funding Manual*.

3. An **accredited funded private school** must keep in force a blanket fidelity bond with respect to all employees and board members in an amount acceptable to the **Minister**. That amount shall be \$50,000 or the amount of the accumulated surplus plus 40 per cent of Alberta Education funding for the program year, whichever is less. Agents may refer to this as a commercial blanket bond.
4. New **accredited funded private schools** are required to provide a Certificate of Incorporation under the *Societies Act* or a non-profit company registered under Part 9 of the *Companies Act* or a special act of the Legislature.

Alberta Initiative for School Improvement (AISi)

1. **School authorities** must provide Alberta Initiative for School Improvement (AISi) reporting information according to the following timelines:
 - a) **October 15** – AISi Project Annual Report (APAR); AISi Project Final Report (APFR) in the final year of the project.
 - b) **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**.

Base Instruction

1. All enrollment information must be submitted through Client Relationship services.
2. Base instruction funding is based on:
 - a) Student registration information in ECS and Grades 1 to 9 as of the **September count date** that is submitted to Client Relationship Services by October 3;
 - 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;
3. The ages of all **funded students** and **funded children** must be determined as of September 1.
Note: **schools** are required to maintain and retain 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.
4. Adjustments to enrollment data:
 - a) if an adjustment is required to the enrollment data reported to Client Relationship Services on the **September count date**, **school authorities** must ensure that changes are made to their modification file.
 - b) after receiving the first RACERS data set, any modification that will impact funding must be submitted using the “Add, Modify, Delete” form in the Funding Event System (FES) or using the paper form (Form 09AE1.2c), by the April 15 deadline.
5. 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 submitted to School Finance indicating the student’s name, birth date and grade and Alberta Student Number (ASN).
6. **School jurisdictions** must submit colony **schools** student registration information as of the **September count date** to Client Relationship Services by October 3.
7. **HIGH SCHOOL**
 - a) student information on Form 09AE1.2a for senior high students taking junior high courses.
 - b) to receive 35 **CEUs** of Base Instruction funding for **high school refugee students** (code 640), **school jurisdictions** must have on file:
 - i. a refugee claim to the Immigration and Refugee Board (IRB) within the past year and
 - ii. an Acknowledgement of Convention Refugee Claim

Charter Schools

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

Funding may be advanced on a one-time basis to any newly approved **charter board**. The **school 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

CTS Evergreening

Alberta Education is revising the Career and Technology Studies (CTS) program to offer relevant learning opportunities to inspire students' interests and passions with connections to business, industry and post-secondary. The multi-faceted CTS initiative includes development of the revised curriculum and resources (print, digital, on-line courses). To support the implementation of the revised program, government has committed \$36 million (\$12 million in each of the 2008/2009, 2009/2010 and 2010/2011 school years) for the evergreening and enhancement of CTS equipment.

School jurisdictions have flexibility in determining how best to allocate these funds at the local level to support equipment evergreening in support of implementation of the revised CTS program. Existing labs may require evergreening of existing equipment or may require enhancement of equipment to support delivery of the revised program. For example, an under-used cosmetology lab may be evergreened to attract more students, or may be enhanced to deliver Sports Medicine or Child Care pathways. It is intended that the funding be used for:

- Equipment and tools purchases/leases/insurance and deployment/maintenance;
- Minor facility upgrades necessary for new equipment (e.g. wiring, ventilation);
- Technical support and installation

Designated Special Education Private Schools (DSEPS)

NEW

1. Funding is only provided to **DSEPS** that have been approved by the **Minister**. The status of approved **DSEPS** may be reviewed and withdrawn at any time by Alberta Education.
2. No new **DSEPS** or satellite campuses will be approved until after the completion of both Setting the Direction for Special Education and Inspiring Education: A Dialogue with Albertans.

NEW

Duplicate Course Marks

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

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

Early Childhood Services (ECS)

UPDATED

1. **Children with mild/moderate disabilities/delays** must be coded with a code 30 and **funded children** who are gifted and talented must be coded with a code 80. **School jurisdictions** must also include the grants code 500 on the electronic registration file or Alberta Education Student Registration Form to receive this funding.
2. **Funded children** who were enrolled in the program on the **September count date** but were assessed as having mild to moderate disabilities/delays or identified gifted and talented after the **September count date**, an "Add, Modify, Delete Form" (Form 09AE1.2c) must be completed and submitted to School Finance or the data may be submitted online using the Funding Event System (FES). The data should be submitted before April 15 to receive funding.
- For **ECS programs** beginning after the **September count date**, the count will be taken as of the last **operating day** in the month in which the **ECS program** begins. The information must be submitted within three days of that day to the Client Relationship Services.

ECS programs beginning after the **September count date** must also submit a letter to the Director of the School Finance Branch indicating that they are a late starting program, the start date of the program, and a list of all ECS children enrolled with their Alberta Student Numbers (ASN's). This information must be submitted to the School Finance Branch by November 29.

Educational Programs in Institutions (EPIs)

INSTRUCTIONS FOR 2009/2010 INSTITUTIONAL FUNDING APPLICATIONS

Two categories of EPIs:

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

ALLOWABLE COSTS

1. Instructional Salary Costs

- a) Certified Salaries & Benefits: teacher/school administration salaries and benefits.
- b) Uncertified Salaries & Benefits: teacher assistants and office staff.
- c) Substitute Teacher(s): costs for substitute teachers when teachers or teacher assistants are not in school.

2. Supplies and Services Costs

- a) Professional Development: staff training, conferences, and in-services.
- b) Educational Supplies: materials and resources which students/teachers require for the educational program, such as textbooks, notebooks, CDs, DVDs, pens and pencils.
- c) Educational Services: costs for educational or psychological assessments directly related to providing the educational program such as reading, math, I.Q., fine motor/gross motor skills.

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

3. Technology Costs: are based on the lesser of:

- a) \$500 x the average number of **institutional students** to a maximum of:
 - 21 to 50 students = \$20,000
 - 51 to 100 students = \$40,000
 - Over 100 students = \$50,000

Mixed programs calculate costs based on **institutional students** only, (line D of the budget form) or

- b) actual costs not exceeding the above formula.

REVENUES:

Please list:

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

AVERAGE NUMBER OF STUDENTS ENROLLED:

Step 1:	The Sum of the # of students enrolled each month divided by the # of months the program operated.
Step 2:	Add 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 but exclude the non-eligible students who are enrolled.

English as a Second Language (ESL)

1. Student registration information for ECS to Grade 12 as of the **September count date** of the current **school year** must be submitted to the Client Relationship Services Branch by October 3. This registration must include Canadian-born (code 303), Foreign-born (code 301) and unfunded 7 (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 February 27 must be submitted to the Information Services Branch by March 4, 2009.

First Nations

For **funded students** attending First Nations schools, Base Instruction funding is based on student information provided on Form 09AE1.2b.

Francophone

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

Home Education

1. Home Education funding is based on:
 - a) student registration information in Grades 1 to 12 as of the **September count date** that is submitted to Client Relationship Services; and
 - b) the application for reimbursement of ADL course costs for **home education students** in Grades 7 to 12 enrolled in courses at the ADLC (Form 09AE1.4a);
 - 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 09AE1.4b).

Infrastructure Maintenance and Renewal (IMR)

1. IMR projects for upgrading building components to meet health and safety standards, to replace failed facility components, or to meet municipal requirements, whose costs exceed \$1 million, will require ministerial approval. Otherwise, IMR projects costing \$1 million or less, do not require ministerial approval.
2. Program modernization projects in excess of \$250,000 will require ministerial approval.
3. All projects over \$100,000 must be tendered through a competitive bidding process as per the *School Building and Tendering Regulation 383/88*. Projects over \$250,000 must also follow the process outlined in the *Agreement on Internal Trade*.

NEW Locally Developed Courses

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 CEU funding. Course codes are provided to **school authorities** for a specified term, for each senior high locally developed course that has been locally authorized through a board motion and meets 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 of the 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**.

Outreach

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

Program Unit Funding (PUF)

1. A PUF application must be submitted to Alberta Education by December 18. **School authorities** shall apply using the electronic PUF application in the Program Unit Funding System (PUFS). Small **private ECS operators** with less than 10 children may apply for PUF using the paper application form (Form 09AE1.6a).
- NEW 2. Revisions/changes to the original PUF application can be made in PUFS or for small **private ECS operators** who submitted a paper PUF application, please use Form 09AE1.6b. The deadline for the submission of changes to a PUF application is March 1.
3. **School jurisdictions** must report actual expenditures for PUF children using Form 09AE1.6c which are due October 30.
4. **Private ECS operators** must report actual expenditures for PUF children on the PUF in the Audited Financial Statements, which are due November 30.

Regional Educational Consulting Services (RECS)

- REVISED** 1. The **school jurisdictions** designated to provide Regional Educational Consulting Services will submit a budget (Form 09AE6.2) to the School Finance Branch by June 30, indicating projected expenditures and revenues for the services for the upcoming **school year**. **School jurisdictions** will be allowed to retain any surpluses to help offset future expenses or deficits. The budgeted expenditures shall not exceed the total revenues projected, including any surplus funds from previous years. Alberta Education will not fund any deficits.
2. The designated **school jurisdictions** will provide, to the School Finance Branch, a financial statement of the actual revenues and expenditures associated with the provision of services on or before November 30 of each year for the previous **school year**.

For referral information in the following zones, contact:

ZONE 1 — C.A.S.E.

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

ZONES 2, 3 and 4 Edmonton Regional Educational Consulting Services

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

ZONES 4, 5 and 6 REACH Services

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

Services for Francophone Authorities

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

Special Needs

- REVISED** 1. For **student with special needs** who are directed by their resident **school jurisdiction** to another **school jurisdiction** under an **educational services agreement** :
- a) the providing/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 September count date** headcount and all related funding is provided by Alberta Education to the resident **school jurisdiction**. This ensures that the **resident school board** maintains responsibility for the student. No funding is provided by Alberta Education to the providing/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 can only be used by **school jurisdictions** and cannot be used with students coded as 110, 145, 600, or 610.
2. A **Designated Special Education Private School** shall report all students enrolled in the **school** on the **September count date** to Client Relationship Services by the **submission date**.

Transportation

- 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 **September count date** are eligible for this funding.
- 3. For parent-provided transportation, **school authorities** must have signed agreements/contracts in place and on file by November 30.

NEW

REVISED Section 9.2 — Alberta Education Contact List

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

BRANCH	CONTACT	PHONE #
School Finance	Brad Smith	(780) 422-0920
	Mary-Ellen Deising	(780) 422-0312
	Mark Lalumiere	(780) 422-6550
	Daimen Tan	(780) 422-1098
Business Operations and Stakeholder Support	Jeff Willan	(780) 422-0930
Financial Reporting and Accountability	Dick Meanwell	(780) 422-0311
Special Programs	Ron Taylor (Calgary)	(403) 297-5021
Field Services		
Zone 1	Terry Wendel	(780) 427-5394
Zones 2 and 3	Keith Jones	(780) 427-6714
Zone 4	Doug Coffin	(780) 427-5412
Zone 5	David Woloshyn	(780) 427-5382
Zone 6	Ron Taylor	(403) 297-5021
School Improvement	Dianna Millard	(780) 427-7882
First Nations, Metis, and Inuit Services	Linda Pelly	(780) 427-5411
Client Relationship Services	Help Desk	(780) 427-5318
Governance Support	Sandra Shepitka-Boyle	(780) 422-2821
French Language Services	Gilbert Guimont	(780) 427-2940
Budget and Fiscal Analysis	George Lee	(780) 415-8325
Curriculum	Stella Shrum	(780) 422-2856
Alberta Children and Youth Initiative	Marni Pearce	(780) 427-1199
Stakeholder Technology	Bette Gray	(780) 427-1509
Capital Planning Branch North Region	Tom Davidson	(780) 427-2083
Capital Planning Branch South Region	Avi Habiski	(780) 427-2272
Capital Programs Branch (Alberta Infrastructure)	Mike Irving	(780) 422-7224

Any of the individuals above may be contacted by email by typing their first name, (.) dot, last name followed by @gov.ab.ca, (e.g., mark.lalumiere@gov.ab.ca), with the exception of Brad Smith who can be contacted by email at BSmith@gov.ab.ca.

The 2009/2010 Funding Manual for School Authorities is available for viewing and printing on Alberta Education's Web site at <http://www.Education.gov.ab.ca/funding/FundingManual/>.

Unless otherwise indicated, funding application forms should be submitted to the School Finance Branch at:

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

REVISED

Section 9.3 — References

All References are hyperlinked and can be accessed through the online version of the 2009/2010 *Funding Manual for School Authorities*: <http://education.alberta.ca/fundingmanual.aspx>.

[Aboriginal Learner Data Collection Initiative](#)

[AISI Web Site](#)

[Alberta Education Programs of Study](#)

[Alberta Initiative for School Improvement \(AISI\) Handbook for Cycle 3, 2006-2009](#)

[Alberta SuperNet](#)

[Charter Schools Handbook \(2002\)](#)

[Charter Schools Regulation — Alberta Regulation 212/2002 School Act](#)

[CTS Evergreening Fact Sheet](#)

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

[ECS Special Education Handbook](#)

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

[Guide to Education ECS to Grade 12 \(2009\)](#)

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

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

[Guide to School Board Planning and Results Reporting \(2009\)](#)

[Handbook for the Identification and Review of Students with Severe Disabilities 2009/2010](#)

[Home Education Regulation 145/2006 — Alberta Regulation 145/2006 School Act](#)

[Home Education Regulation Notification Form](#)

[Innovative Classroom Technology](#)

[Kindergarten Program Statement Revised September 2008](#)

[Management of Integrated Services for Children and Youth with Complex Needs and Their Families: Guidelines for Alberta Regional Teams](#)

[Outreach Programs Handbook \(2009\)](#)

[Policy Framework for Services for Children and Youth with Complex Needs and Their Families \(July 2003\)](#)

[Special Education Coding Criteria 2009/2010](#)

[Special Education Definitions \(2004/2005\)](#)

[Standards for Special Education, Amended June 2004](#)

[Standards for the Provision of Early Childhood Special Education \(2006\)](#)

[Student Record Regulation 225/2006](#)

[Student Health Partnership Service Plan Guidelines for 2006-2007](#)

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

Section 9.4 —Ceasing of Operations by a Private ECS Operator

POLICY

When funding has been provided by Alberta Education to a **private ECS operator**, and the **private ECS operator** ceases operations, any surplus funds shall be returned to the Minister of Finance or maybe provided to another approved **private ECS operator**.

CONDITIONS

1. 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.
2. 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. 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.
3. 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.
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 of the effective date on which the society will be dissolved.
6. If an **ECS operator** ceases operations during the **school year**, unexpended fees paid by **parents** for the year, should be returned to the **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. The amount payable to Alberta Education will be communicated by letter from the Director of the School Branch.
8. Whenever possible, any capital assets and supplies should be transferred to another **ECS operator**. 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.

Section 9.5 — Government Organization Act

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

Section 9.6 — Withdrawal of Teacher Services or Lockout

POLICY

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

CONDITIONS

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

FUNDING APPLICATION DEADLINES and OTHER IMPORTANT DEADLINES			
FORM NO.	FUNDING APPLICATION FORM	DUE DATE	RETURN TO
09AEDSA	Delegation of Signing Authority Form	October 30, 2009	SF
09AE1.2a	Junior High Courses taken by senior High Students (School Jurisdictions and Private Schools)	Upon Completion of Term/Course	SF
09AE1.2b	Funded Students Attending First Nations Schools	April 15, 2010	SF
09AE1.2c	Add, Modify, Delete Form for Enrolments	*April 15, 2010	SF
09AE1.2d	Declaration of Management for 2008/2009	January 29, 2010	SF
09AE1.4a	Application for Reimbursement of ADL Course Costs for Home Education Students in Grades 7 to 12.	May 31, 2010	SF
09AE1.4b	Funding Application for Additional ADL Course Costs for Home Education Students in Grades 1 to 6	**	SF
09AE1.6a	ECS Program Unit Funding Application	December 18, 2009	SF
09AE1.6b	ECS PUF Statement of Actual Expenditures	October 30, 2009	SF
09AE1.6c	PUF Application Adjustments Form	March 1, 2010	SF
Electronic Submission	Application Form -Rural Transportation	November 30, 2009	BOSS
	Application Form -Special Transportation and Boarding	November 30, 2009	BOSS
	Application Form -Urban Transportation	November 30, 2009	BOSS
Electronic Submission	Application Form -ECS Transportation –Regular, Special, and Family-Oriented Programming Sessions	November 30, 2009	BOSS
09AE3.0	Accredited Funded Private School Authority Accountability and Funding Declaration	November 20, 2009	GS
09AE5.4	SuperNet Service Funding Application	***Upon Connection	STB
09AE6.1	Institutional Programs – Budget –Final	May 31, 2009	SP
		October 15, 2010	SF
09AE6.2	Regional Educational Consulting Services (RECS) Budgeted Revenues and Expenditures	June 30, 2009	SP
09AE6.4	Regional Consortium Statement of Revenues and Expenses Regional Consortium Statement of Financial Position	December 31, 2010	SF
09AE6.6	Ft. McMurray Allowance FTE Calculation Form	March 31, 2010	SF
09AE6.7	Report on CTS Equipment Evergreening Costs	June 30, 2009	ZS

* **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, 2009**

IMPORTANT DEADLINES – 2009/2010 SCHOOL YEAR

Submission of documentation for Duplicate Course Marks for the previous year	January 29, 2010
Modifications to Enrolment and Transportation Information to School Finance	April 15, 2010
Resolution of Priority School Conflicts	April 30, 2010
Back-up documentation for Priority School Conflicts	May 14, 2010
Enrolment Verification Reports to School Finance	June 30, 2010
Course and Marks Submission or Modification to CRS	
Term 1	June 30, 2010
Term 2,3,4	November 15, 2010
Course and Module Conflicts and Students Not Enrolled on the Count Date	
All Terms	December 31, 2010

LEGEND:	SF	=	School Finance	SP	=	Special Programs
	CRS	=	Client Relationship Services	STB	=	Stakeholder Technology Branch
	ZS	=	Zone Services	BOSS	=	Business Operations and Stakeholder Support
	GS	=	Governance Support			

DELEGATION OF SIGNING AUTHORITY FORM 2009-2010 SCHOOL YEAR

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)	POSITION	SIGNATURES

CERTIFICATION

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

Secretary – Treasurer

Date

JUNIOR HIGH COURSES TAKEN BY SENIOR HIGH STUDENTS 2009/2010 SCHOOL YEAR

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

Name of School: _____ School Code: _____

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

COMPLETION DATE

☐ September 1 to March 1

☐ March 2 to June 30

☐ July 1 to August 31
(Summer School Only)

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

CERTIFICATION

I certify the information reported on this form is correct.

(Signature of: Secretary-
Treasurer/Superintendent)

(Signature of:
Teacher/Principal)

(Date)

**FUNDED STUDENTS ATTENDING FIRST NATIONS SCHOOLS
ON A RESERVE
2009/2010 SCHOOL YEAR**

School Authority Code: _____

[illegible]

CERTIFICATION

I certify the information reported on this form is correct.

Signature of Secretary - Treasurer

Date

BASE INSTRUCTION ADD, MODIFY, DELETE FORM FOR ENROLMENTS ON SEPTEMBER 30, 2009 2009/2010 SCHOOL YEAR

Authority Code: _____

School Code: _____

Action: _____ Registration: _____

ASN: _____ Local School _____

Board ID: _____

Last Name: _____ First Name: _____

AKA First _____

AKA Last Name: _____ Name: _____

Gender: Exit _____

Description: _____

Birth Date: _____ Exit Date: _____

Address Line 1: _____

Address Line 2: _____

City: _____ Province: _____

Postal Code: _____ Phone: _____

See Reverse for Legend

Comments: _____

Please Note: The student must be enrolled and attending on the count date of the current school year.

Authority Name: _____

School Name: _____

Grade: _____

Enrollment _____ Date: _____

Citizenship: _____ Expiry Date: _____

Sec.23 _____

Eligibility: _____ French Hours: _____

Reg. Entry _____

Status: _____ Resident Juris: _____

Exit _____

Description: _____ Exit Date: _____

Special _____

education _____

needs: 1 _____ 2 _____

Enrollment _____

Type: 1 _____ 2 _____ 3 _____

Grant Codes: _____

1 _____ 3 _____ 4 _____

Blended Home
Percentage of
Program at
School

Certification

I certify the information reported on this form is correct.

(Signature of: Secretary-Treasurer/Superintendent)

(Signature of: Teacher/Principal)

(Date)

Legend

Action:	(A) Add, (M) Modify, (D) Delete
ASN:	Alberta Student Number –assigned by Alberta Education (9- Digits)
Last/First Name:	Student Name
Local Board ID:	The number assigned by the school or school authority for internal tracking (if applicable)
Gender:	(M) Male, (F) Female
Birth Date:	Year, Month, Day (YYYY, MM, DD)
Enrolment Type:	Refer to Code Table in Student Information System User's Guide
Grant Codes:	Refer to Code Table in Student Information System User's Guide
Grade:	(EC) Early Childhood, (01) grade 1, (02) grade 2, etc. (UG) ungraded
Registration:	(D) Day, (E) Evening, (S) Summer
Resident Juris:	Enter the school jurisdiction code for the resident school jurisdiction . This field applies to: <ul style="list-style-type: none"> a) Designated Special Education Private Schools (Code 110). For students who's parents consulted with their resident school jurisdiction prior to enrolment 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)
Special Education:	The following codes are for students and ECS children with special education 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

French Hours: The number of hours taught per year in French Language

Enrolment Date: Year, Month, Day (YYYY, MM, DD)

DECLARATION OF MANAGEMENT FOR 2008/2009 SCHOOL YEAR

School Jurisdiction Name: _____

School Authority Code: _____

“As the Superintendent and Secretary-Treasurer, we certify that the Credit Enrolment 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*.”

TITLE	SIGNATURES	DATE
Superintendent		
Secretary Treasurer		

**APPLICATION FOR REIMBURSEMENT OF ADL COURSE COSTS FOR
HOME EDUCATION STUDENTS IN GRADES 7 TO 12
2009/2010 SCHOOL YEAR**

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

Name of School Authority: _____ **Authority Code:** _____

Name of School: _____ School Code: _____

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

For Course and Course Costs information please refer to the appropriate Course Guide which is available on the ADLC website at: www.adlc.ca under “Courses”. Only approved ADLC Print courses with costs for Tuition Fees, Lesson Materials and Required Resources are eligible for reimbursement at 50% to a maximum of \$1,494 per student. Costs for online courses and optional resources are not eligible costs.

CERTIFICATION

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

(Signature of: Secretary-Treasurer/Superintendent)

(Signature of:
Teacher/Principal)

(Date)

Name of School: _____ **School Code:** _____

For Course and Course Costs information please refer to the appropriate Course Guide which is available on the ADLC website at: www.adlc.ca under “Courses”. Only approved ADLC Print courses with costs for Tuition Fees, Lesson Materials and Required Resources are eligible for reimbursement at 50% to a maximum of \$1,494 per student. Costs for online courses and optional resources are not eligible costs.

(Date)

**ECS PROGRAM UNIT FUNDING APPLICATION FOR
PRIVATE ECS OPERATORS (with 10 or fewer PUF children)
2009-2010 SCHOOL YEAR**

See Section 1.6 of the *Funding Manual for School Authorities* for information on the completion of this application.
See also the *ECS Special Education Handbook* and *Special Education Coding Criteria 2009/2010*.
Submit one copy of this application and only one Budget for all the PUF Children in your program

Name of Private ECS/Private School: _____

Name of School/Centre: _____

Address: Postal Code: _____

Contact Person: Telephone No: _____

E-Mail Address: Fax No: _____

Number of Program Unit Children:
(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 Special Education Coding Criteria 2009/2010.
- Program goals for each child have been developed on the basis of recommendations arising from screening and assessment data.
- A program consistent with the special education needs of each child will be undertaken by the teacher(s), assisted by appropriate support staff in the most enabling educational environment.
- Consultative assistance will be provided to staff and **parent(s)** / guardian(s) as required.
- Direct services will be provided to each child and/or **parent(s)** / guardian(s) as required.
- Case conferences will be held regularly to evaluate each child's progress and to decide on changes, where appropriate, in the program in consultation with the **parent(s)** / guardian(s).
- Long term plans for the child(ren) have been discussed with the receiving **school authority(ies)**.

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

Signature of Secretary – Treasurer

Date

FOR DEPARTMENT USE:

APPROVED BY: _____
(Signature of Expenditure Officer)
Special Programs Branch

Amount Approved: \$ _____

(Signature of Expenditure Officer)
School Finance Branch

Date Approved: _____

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 Programming Sessions***	
			Dept Use Only	Yr.	Mo.	Day				Yr.	Mo.	Day	Yr.	Mo.	Day		Total # of Sessions	Total # of Session Hours
		FIRST PROGRAM UNIT																
1.																		
2.																		
3.																		
4.																		
		SECOND PROGRAM UNIT																
1.																		
2.																		
3.																		
4.																		
		THIRD PROGRAM UNIT																
1.																		
2.																		
3.																		
4.																		
		FOURTH PROGRAM UNIT																
1.																		
2.																		
3.																		
4.																		
		FIFTH PROGRAM UNIT																
1.																		
2.																		
3.																		
4.																		

*In this column please indicate whether it is:
 (R) – for a renewal application;
 (N) – for a new application.

** Refer to assessed primary disability by code; i.e. Code 41 Severe Cognitive Disability, Code 42 Severe Emotional/Behavioural Disability, Code 43 Severe Multiple Disability, Code 44 Severe Physical or Medical (including autism) Disability, Code 45 Deafness, Code 46 Blindness and Code 47 Severe Delay Involving Language
 For Code 44, if the child has autism or other pervasive developmental disorders, also write in specific disability in the space provided.

*** 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 Private ECS Programs

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

PROGRAM UNIT COSTS

INSTRUCTIONAL COSTS

Supplemental Instructional Salaries and Wages (Please attach breakdown of costs
i.e. # of teacher aides and costs, sp.ed. consultation costs, etc.)

\$ _____

Employer's Portion of Fringe Benefits

\$ _____

Specialized Services and Supports (Please attach breakdown of type of service
i.e. OT, PT, Speech, Psych. etc. and cost of each type of service)

\$ _____

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

\$ _____

PARENT INSERVICE

\$ _____

STAFF INSERVICE

\$ _____

TRANSPORTATION COSTS:

• Transportation to and from school # of round trips _____ X \$ _____

• Family-Oriented Programming # of FOP sessions _____ X \$ _____

• Other: - Field Trips _____

• In-Program Transportation _____

Total Transportation Costs _____ (A)

LESS: TRANSPORTATION REVENUES

Alberta Education Transportation Funding: (See Funding Manual, Part 2, Section 2.4 and 2.5 for Private ECS Operators)

• Special Transportation # of round trips _____ X \$ 15.44 _____

• Regular Transportation # children _____ X \$ 538/yr _____

• Family-Oriented Programming Transportation # sessions _____ X \$ 15.44 _____

• Other Transportation Revenue (i.e. fees) _____

Total Transportation Revenues _____ (B)

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

Specialized Equipment and Furniture (Please attach breakdown of costs) \$ _____

TOTAL ECS PROGRAM UNIT COSTS \$ _____

Guidelines for the above expenditure areas are found in the *ECS Special Education Handbook 2009/2010*.

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

**ECS PROGRAM UNIT FUNDING STATEMENT OF ACTUAL
EXPENDITURES FOR SCHOOL JURISDICTIONS
2008/2009 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 2008/2009 SCHOOL YEAR

NAME OF SCHOOL JURISDICTION: _____

INSTRUCTION	ACTUAL EXPENDITURES
Supplemental Instructional Salaries and Wages	\$ _____
Employer's Portion of Fringe Benefits	\$ _____
Specialized Services and Supports	\$ _____
Supplies and Materials	\$ _____
PARENT INSERVICE/STAFF INSERVICE	\$ _____

TRANSPORTATION COSTS:

	Actual Cost (A)	Revenue (B)
To and From School	\$ _____	\$ _____
Family-Oriented Programming Sessions	\$ _____	\$ _____
Other	\$ _____	\$ _____
TOTALS	\$ _____	\$ _____

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

PROGRAM COORDINATION COSTS (for Designated Sp. Ed. ECS Operators only) \$ _____

SPECIALIZED EQUIPMENT AND FURNITURE \$ _____

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

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

TOTAL ECS PUF EXPENDITURES \$ _____

FOR DESIGNATED SPECIAL EDUCATION/CONGREGATED ECS PROGRAMS ONLY

LESS: APPLICABLE REVENUES

• Base Instruction funding	-# of ECS Children on Sept. 30	x \$2,985.50	\$ _____
• Mild to moderate funding	-# of ECS Children on Sept. 30	x \$2,438	\$ _____
• Other Revenues (please specify)	_____		\$ _____
TOTAL REVENUES			\$ _____

NET ECS PROGRAM COSTS ELIGIBLE FOR PUF \$ _____

**PROGRAM UNIT FUNDING
PUF APPLICATION ADJUSTMENTS FORM
2009/2010 SCHOOL YEAR**

NAME OF PRIVATE ECS OPERATOR: _____

This form is only for Private ECS Operators who submitted a paper PUF application. Other School Authorities should make their changes through PUFs. To be completed for PUF children who have left your program earlier than reported on your PUF application, please provide the following information so that your PUF budget and ceiling can be adjusted. (one form per unit). This form can also be used to add new children who were not on your original PUF application.

Alberta Student Number (ASN): _____

Child's Name: _____

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

Number of Centre Program hours provided: _____

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

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

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

Teacher Assistant Salaries/wages \$ _____

Employer's Portion of Fringe Benefits \$ _____

Specialized Services and Supports \$ _____

(# of hours _____ x _____ rate per hour)

(# of hours _____ x _____ rate per hour)

(# of hours _____ x _____ rate per hour)

(# of hours _____ x _____ rate per hour)

Supplies and Materials \$ _____

Parent In-service – \$ _____

Staff In-service – \$ _____

Transportation Costs:

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

Total Transportation Costs \$ _____

Specialized Equipment and Furniture: \$ _____

Total PUF Costs: \$ _____

ACCREDITED FUNDED PRIVATE SCHOOL AUTHORITY ACCOUNTABILITY AND FUNDING DECLARATION 2009/2010 SCHOOL YEAR

Accredited Funded Private School Authority Name: _____

Accredited Funded Private School Authority Code: _____

NOTE: In order for Level 2 to apply to the 2009/2010 school year, this Declaration must be submitted to Alberta Education, Governance Support Branch by **November 20, 2008**.

Level 1 – the accountabilities and monitoring activities ascribed to this accredited funded private school authority will continue to be those used by Alberta Education during the 2007/2008 school year and eligible funding allocations will continue to include grants as authorized in the *2007/2008 Funding Manual for School Authorities*.

Level 2 – the accountabilities ascribed to this accredited funded private school authority will include accountabilities that are part of the provincial accountability program. Eligible funding allocations will include grants as authorized in the *2009/2010 Funding Manual for School Authorities*.

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

☐ **Maintain Level 1 Accountabilities and Funding**

As the Board Chairperson, Principal/Superintendent, and Treasurer, we certify our decision to maintain Level 1 accountabilities and funding allocations for the 2008/2009 school year. We understand that, by choosing this option at this time, it does not preclude our accredited funded private school authority from choosing Level 2 for the 2009/2010 school year, or subsequent school years, through the submission of an authorized Accredited Funded Private School Accountability and Funding Declaration.

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

☐ **Accept Level 2 Accountabilities and Funding**

As the Board Chairperson, Principal/Superintendent and Treasurer, we certify our decision to choose Level 2 accountabilities and funding allocations to our accredited funded private school authority for the 2008/2009 school year.

By choosing level 2, we confirm the following:

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

PRINT NAME	SIGNATURE	DATE
Board Chair		
Principal or Superintendent		
Treasurer		

For Department Use Only:

Reviewed By:

Governance Support _____ Date: _____

Performance Measurement & Reporting _____ Date: _____

School Finance _____ Date: _____

SUPERNET SERVICE FUNDING APPLICATION 2009/2010 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)

EDUCATIONAL PROGRAMS IN INSTITUTIONS

Funding Application Form

2009/2010 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
Total Net Program Costs		

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 2009/2010

NAME OF PROGRAM: _____

CONTACT PERSON: _____

TELEPHONE: _____

Please see Instructions (attached) for completion of this form. Also see Section 6.1 of the 2009/2010 *Funding Manual for School Authorities*. Note: If your program only has institutional students, then complete this form. If your program also has some non-institutional students, you are considered a Mixed Institutional Program and must complete the form for Mixed Institutional Programs rather than this form.

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

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

3. Technology costs (see guidelines for formula)	\$ _____
---	----------

TOTAL PROGRAM COSTS	\$ _____ A
----------------------------	-------------------

REVENUES RECEIVED FOR INSTITUTIONAL STUDENTS

Note: please do not include Institutional funding

1. Base Instruction (based on Sept 30 enrolments of 550 coded students)
 Number of Institutional students enrolled _____ x Base Instruction
 Rate \$ _____

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

2. Other funding (please specify) _____ \$ _____

TOTAL REVENUES	\$ _____ B
-----------------------	-------------------

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

Average number of students enrolled

To calculate the average number of students enrolled:

- Step 1:** Determine the number of students enrolled for each month that the program operated. Note: students who are enrolled for more than 1 month will be counted for each month attended (i.e. if a student attends the program for 3 months, then the student would be counted for each of the 3 months attended). For 2009/2010 Budgets, please use monthly enrolments for the 2008/2009 school year. For 2008/2009 Finals, please use monthly enrolments for the 2008/2009 school year.
- Step 2:** Add up the enrolments for each month to get an annual total.
- Step 3:** Divide the annual total by the number of months the program operated to calculate the average number of students enrolled.

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

Return Budget to: Special Programs Branch • Return Final to School Finance Branch

Instructions for Completion of the 2009/2010 Educational Programs in Institutions Funding Application

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

1. Instructional Salary Costs

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

2. Supplies and Services Costs

- a) Professional Development: staff training, conferences, & in-services
- b) Educational Supplies: materials & resources which students/teachers require for the educational program, such as; textbooks, notebooks, videos, pens/pencils etc.
- c) Educational Services: costs for educational or psychological assessments directly related to providing the educational program such as; reading, math, I.Q., fine motor/gross motor

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

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

Note: Office capital equipment such as 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 Regional Health Authority, Alberta Solicitor General or the agency operating the **institution**.

3. Technology Costs

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

- a) Actual costs
- 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 2009/2010 Budgets, please use monthly enrolments from the 2008/2009 school year. For 2008-2009 Finals, please use monthly enrolments for the 2008-2009 school year.
- Step 2: Add up the enrolments for each month to get an annual total.
- Step 3: Divide the annual total by the number of months the program operated to determine the average number of students enrolled.

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

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

Mixed Institutional Program Budget/Final Costs 2009/2010

NAME OF PROGRAM: _____

CONTACT PERSON: _____ TELEPHONE: _____

Please see Instructions (attached) for completion of this form. Also see Section 6.1 of the 2009/2010 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.

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

REVENUES RECEIVED FOR INSTITUTIONAL STUDENTS

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

1. Base Instruction (based on Sept 30 enrolments of 550 coded students) Number of Institutional students enrolled _____ x \$5,971	\$			
<i>For Budgets -use an estimate based on previous years Sept. 30 enrolments –please do not use the average number of students enrolled. For Final Costs, use actual Sept 30 enrolments</i>				
2. Other funding (please specify) _____	\$			
TOTAL REVENUES FOR INSTITUTIONAL STUDENTS	\$			_____ F
NET PROGRAM COSTS FOR INSTITUTIONAL STUDENTS (E- F)	\$			_____

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

Instructions for Completion of the 2009/2010 Educational Programs in Institutions Funding Application

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

4. Instructional Salary Costs

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

5. Supplies and Services Costs

- e) Professional Development: staff training, conferences, & in-services
- f) Educational Supplies: materials & resources which students/teachers require for the educational program, such as; textbooks, notebooks, videos, pens/pencils etc.
- g) 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, treatment, therapy or psychiatric services are not to be included in this category as these are the responsibility of the Regional Health Authority, Alberta Solicitor General or the agency operating the **institution**.

- h) 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 Regional Health Authority, Alberta Solicitor General or the agency operating the **institution**.

6. Technology Costs

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

- d) Actual costs
- e) (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).
- f) 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 2009/2010 Budgets, please use monthly enrolments from the 2008/2009 school year. For 2008/2009 Finals, please use monthly enrolments for the 2008/2009 school year.
- Step 2: Add up the enrolments for each month to get an annual total.
- Step 3: Divide the annual total by the number of months the program operated to determine the average number of students enrolled.

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

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

REGIONAL EDUCATIONAL CONSULTING SERVICES (RECS) BUDGETED REVENUES AND EXPENDITURES 2009/2010 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)	\$ _____	\$ _____
Total Revenues	\$ _____	\$ _____
EXPENDITURES	_____	_____
▪ 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 _____	\$ _____	\$ _____
Total Expenditures	\$ _____	\$ _____
SURPLUS/(DEFICIT) FOR THE YEAR	\$ _____	\$ _____

*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, 2010 (in dollars)

CONSORTIUM NAME: _____

	<u>Budget 2009/2010</u>	<u>Actual 2009/2010</u>	<u>Actual 2008/2009</u>
REVENUES			
Alberta Education:			
Management & Infrastructure (Note 1)	_____	_____	_____
Conditional Programming Grants (Schedule 1)	_____	_____	_____
Other Alberta Education	_____	_____	_____
Total Alberta Education			
Other Revenue:			
Program Registration (Note 2)	_____	_____	_____
Grants – Non Government Sources (Note 3)	_____	_____	_____
Other (Note 4)			
(Specify) _____	_____	_____	_____
(Specify) _____	_____	_____	_____
Total Other Revenues	_____	_____	_____
TOTAL REVENUES:	_____	_____	_____
EXPENSES			
Management & Infrastructure (Note 5):			
Salaries, Wages, Benefits, Contracts and Other Fixed Overheads (Note 6)	_____	_____	_____
Board Expenses (Note 7)	_____	_____	_____
Programming:			
Costs of Delivering Programs (Note 8)	_____	_____	_____
Other:			
(Specify) _____	_____	_____	_____
(Specify) _____	_____	_____	_____
(Specify) _____	_____	_____	_____
TOTAL EXPENSES:	_____	_____	_____
REVENUES less EXPENSES (Note 15)	_____	_____	_____
Accumulated Surplus at beginning of year:	_____	_____	_____
Accumulated Surplus at end of year:	=====	=====	=====

REGIONAL CONSORTIUM
Statement of Financial Position
For the Year Ended August 31, 2010 (in dollars)

CONSORTIUM NAME: _____

	August 31, 2010	August 31, 2009
ASSETS		
Cash in Bank and Temporary Investments	_____	_____
Accounts Receivable (Note 9):		
Province of Alberta	_____	_____
Alberta School jurisdictions	_____	_____
Other	_____	_____
Prepaid Expenses (e.g. deposits for programming)	_____	_____
Other Assets	_____	_____
TOTAL ASSETS:	=====	=====
LIABILITIES		
Accounts Payable	_____	_____
Accrued Liabilities (Note 10)	_____	_____
Deferred Revenues		
Programming Grants (Schedule 1)	_____	_____
Prepaid Registration (Note 11)	_____	_____
Other:		
(Specify) _____	_____	_____
(Specify) _____	_____	_____
TOTAL LIABILITIES:		
ACCUMULATED SURPLUS		
Operational Reserves (Note 12)	_____	_____
Unrestricted Funds (Note 13)	_____	_____
TOTAL ACCUMULATED SURPLUS (Note 15)	_____	_____
TOTAL LIABILITIES AND ACCUMULATED SURPLUS	=====	=====

REGIONAL CONSORTIUM
Schedule 1 – Conditional Grant Programs Revenues
For the Year Ended August 31, 2010 (in dollars)

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)
Conditional Grant Programs									
(Specify) e.g. Special Education									
(Specify)									
(Specify)									
(Specify)									
(Specify)									
(Specify)									
(Specify)									
(Specify)									
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(Specify)									
(Specify)									
(Specify)									
(Specify)									
(Specify)									
(Specify)									
(Specify)									
Total									

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, 2010 (in dollars)

CONSORTIUM NAME: _____

	Amount Transferred 2009/2010 (a)
(Specify Program)	_____
(Specify Consortium)	_____
(Specify)	_____
(Specify)	_____
(Specify)	_____
(Specify)	_____
(Specify)	_____
(Specify)	_____
Total (Specify Program)	_____
(Specify Program)	_____
(Specify Consortium)	_____
(Specify)	_____
(Specify)	_____
(Specify)	_____
Total (Specify Program)	_____
(Specify Program)	_____
(Specify Consortium)	_____
(Specify)	_____
(Specify)	_____
(Specify)	_____
Total (Specify Program)	_____
(Specify Program)	_____
(Specify Consortium)	_____
(Specify)	_____
(Specify)	_____
(Specify)	_____
Total (Specify Program)	_____
(Specify Program)	_____
(Specify Consortium)	_____
(Specify)	_____
Total (Specify Program)	_____
Total Transfers	_____

(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 Statement Certification
For the Year Ended August 31, 2010

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.

**FORT MCMURRAY ALLOWANCE
FTE CALCULATION FORM
2009-2010 SCHOOL YEAR**

Authority Name: _____

School Authority _____ **Code:** _____

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

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

² Staff not covered by a collective agreement.

CERTIFICATION

I certify the information reported on this form is correct.

(Signature of: Secretary-
Treasurer/Superintendent)

(Date)

Report on CTS Equipment Evergreening Costs 2009-2010 SCHOOL YEAR

Each eligible school jurisdiction, Francophone Regional authority and charter school must submit this form by June 30, 2009 in order to receive their Career and Technology Studies (CTS) Equipment Evergreening funding for 2009/2010.

2008/2009 Actual Costs		
CTS Cluster	Evergreening Equipment Costs	Enhancing Equipment Costs
Media Design and Communication Arts		
Business, Administration, Finance and Information Technology		
Natural Resources		
Trades, Manufacturing and Transportation		
Health, Recreation and Human Services		
Total Actual Costs for 2008/2009		
2009/2010 Projected Costs		
CTS Cluster	Evergreening Equipment Costs	Enhancing Equipment Costs
Media Design and Communication Arts		
Business, Administration, Finance and Information Technology		
Natural Resources		
Trades, Manufacturing and Transportation		
Health, Recreation and Human Services		
Total Projected costs for 2009/2010		
2010/2011 Projected Costs		
CTS Cluster	Evergreening Equipment Costs	Enhancing Equipment Costs
Media Design and Communication Arts		
Business, Administration, Finance and Information Technology		
Natural Resources		
Trades, Manufacturing and Transportation		
Health, Recreation and Human Services		
Total Projected Costs for 2010/2011		

On a separate page, please answer the following questions and submit the responses with this form:

1. How were community partners were involved in the development of your CTS equipment funding implementation plan to support the viability and sustainability of the CTS courses offered by your schools?
2. How will you know this funding has made a difference for students?
3. What issues related to implementation have you experienced in 2008/2009. What issues do you foresee for 2009/2010 or 2010/2011?
4. Please identify any highlights or positive experiences related to the CTS equipment funding.

GLOSSARY OF TERMS

NOTE: The terms listed in the Glossary of Terms are **bolded** throughout the text of the Funding Manual.

Accredited Funded Private School

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

Activity Program

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

Alternative French Language Programs

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

- 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.

ASFF Eligible Student

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

1. On the **September count date**, meets the requirement of Section 8(1)(a) and (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 in 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

Associate Board

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

Associate Accredited Funded Private School

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

Audition

For the purpose of funding means a trial performance in which an actor, singer, dancer, athlete or other performer demonstrates prowess in his or her abilities and the audition results are used to determine entry qualification.

Blended Program

An educational program consisting of two distinct parts:

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

Board

NEW

See definition of "School Board".

CEU (Credit Enrolment Unit)

A CEU is a funding unit used to calculate base instructional funding at the high school level paid to school authorities to allocate as they see fit. CEUs are determined when the course, the student, and the student's achievement in a course meet established criteria.

Course

To be eligible for CEU funding, courses must in their set up and delivery to students meet certain requirements:

- Courses delivered to students must fully align with the provincially mandated Program of Studies
- Access to instructional hours where applicable
- Administrative requirements (e.g. Locally Developed Courses require a board motion and Alberta Education approval)

Student

To be eligible for CEU funding the student taking the course must meet the definition of a funded student as found in the glossary of terms in the Funding Manual for School Authorities for the applicable school year in which the course is delivered to the student. Exception: A student may be eligible for CEU funding if they meet all the funded student criteria except the attendance on the September count date criterion. If you have any questions regarding this criterion please contact the Director of the School Finance Branch.

Student Achievement

The student eligible for funding in a specified course must meet established achievement criteria to generate CEU funding.

Student credits do not directly relate to Credit Enrolment Units (CEU). The funding relationship of CEUs to courses is as follows:

1 credit courses = 1 **CEU**

3 credit courses = 2.5 **CEU**

5 credit courses = 5 **CEU**

The funding provided per **CEU** can be found in the Rates Tables in Section 8 of this manual.

Challenge Assessments

These are assessments that provide high school 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.

Charter Board

Is 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

REVISED

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

For the 2009 – 2010 **school year**, the following **charter schools** have been approved:

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

Child with a Disability/Delay

A **funded child** who is assessed and coded as having a mild, moderate or severe disability/delay.

Child with a Mild/Moderate Disability/Delay

A **funded child** who is assessed as having a mild/moderate disability/delay, as defined in the Special Needs Coding Criteria Handbook 2009 – 2010.

Child with a Severe Disability/Delay

A **funded child** who is assessed as having a severe disability/delay according to the criteria and categories set out in Special Needs Coding Criteria Handbook 2009/2010.

Child with Special Education Needs

A **funded child** who is assessed and coded as having a mild, moderate or severe disability/delay or who is gifted and talented according to Special Needs Coding Criteria Handbook 2009/2010.

Clustering

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

Day Students

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

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

Declaration of Management

A form in which **school jurisdictions** certify Credit Enrolment Unit (**CEU**) information as follows "As the Superintendent and Secretary-Treasurer, we certify that the **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 **School Board** Chair, 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."

Density

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

Designated School

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

Designated Special Education ECS Programs For 2009/2010

An **ECS program** in which at least 70% of the **funded children** served have a severe disability/delay. **ECS programs** with this designation may include **children with mild to moderate disabilities/delays** and/or regular ECS **funded children**, totaling a maximum of 30% of their ECS population. The following programs have been approved for this status for the 2009/2010 school year:

School Jurisdictions	Schools
• Black Gold Regional Division #18	<ul style="list-style-type: none"> – East Elementary Early Entry Program (3214) – Ecole Bellevue (3201)
• Calgary School District #19	<ul style="list-style-type: none"> – James Short Memorial School (Early Development Centre) (9364)
• Edmonton School District #7	<ul style="list-style-type: none"> – Beacon Heights School (7106) – Elmwood School (7204) – Evansdale School (7215) – Glenrose Hospital (7701) – Hazeldean School (7132) – Hillview School (7255) – Homesteader School (7240) – Kids North (0484) – Mayfield School (7209) – Scott Robertson (7171) – Tevie Millar Heritage School (7772) – Waverley School (7189)
• Edmonton Catholic Separate School District #7	<ul style="list-style-type: none"> – St. Gabriel School (Hand in Hand Education through experience) (8217)
• Elk Island Public School Reg. Div. #14	<ul style="list-style-type: none"> – REACH Program
• Grande Prairie School District #2357	<ul style="list-style-type: none"> – Crystal Park Pre-School Program (1150)
• Greater St. Albert Catholic Regional Division #29	<ul style="list-style-type: none"> – Vital Grandin School (2578) – G. P. Vanier School (2570)
• Medicine Hat School District #76	<ul style="list-style-type: none"> – Herald Pre-School (6849) – Riverside School (6853) – Elm Street School (6848)
• Medicine Hat Catholic Separate Regional Division #20	<ul style="list-style-type: none"> – St. Louis Early Dev. Program (6872)
• Northern Lights School Division #69	<ul style="list-style-type: none"> – Vera M. Welsh School (2704)
• Parkland School Division #70	<ul style="list-style-type: none"> – Broxton Park School (2228)
• Rocky View School Division #4	
• Wetaskiwin Regional Division #11	<ul style="list-style-type: none"> – Wetaskiwin Early Ed. Centre (WEEC)

Designated Special Education ECS Programs (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 (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)
- Society for Treatment of Autism (0212)
- The Heartland Agency (0285)
- The PREP Program (0230)

Designated Special Education Private School (DSEPS)

An **accredited funded private school** that has given special approval and funding by Alberta Education where the sole purpose of the **school** is to serve students who are identified with a mild, moderate, or severe disability. The educational programs provided to the students require modifications or adaptations to the *Program of Study*, and are specified in the **Individualized Program Plan (IPP)** developed and implemented for each student. The following DSEPS are approved for the 2009/2010 **school year**.

- 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 (1446)
The Third Academy – Red Deer (0477)
The Third Academy – Lethbridge (0522)

REVISED Developmentally Immature (Code 10)

A **funded child** who:

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

Distance

A 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

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

Early Childhood Services (ECS) Operator

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

Early Childhood Services (ECS) Program

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

ECS HOME PROGRAM

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

Educational Services Agreement

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

Effective Transportation Area

For the purposes of Rural Transportation Block funding this 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**; or
 - 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*; or
 - 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; or
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 has been directed by their **resident board** to attend an **accredited funded private school** with which the **resident board** has an **education services agreement** that has been approved for funding.
7. Is not a **First Nations student with status who lives on a reserve** pursuant to the *Indian Act*.

Eligible Transportation Distance

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

UPDATED

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**.

Expected Eligible Passenger

A term used in Section 1.30 – Metro Urban Transportation and refers to the number of **eligible passengers** calculated on the basis of enrolment and a number of factors which affect eligibility for transportation.

Family-Oriented Programming

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

First Nations Child/Student who Resides on a Reserve

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

Francisation

A program that assists students attending Francophone **schools** who do not have sufficient French language skills to succeed in **school**.

Francophone Education Program

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

Francophone Regional Authority

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

French as a Second Language (FSL)

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

French First Language (Francophone) Education

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

Frozen Funded Head Count

This is a "snapshot" of the **Funded Student** Count of the **September count date** as it stands on the last business day of May each year.

FTE

Means Full-Time Equivalent.

FTE Funded Child(ren)/students

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

FTE Funded Enrolment

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

FTE Weighted Enrolment

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

Funded Child

An individual who:

- a) is attending an **ECS program** on the **September count date** of the current **school year** operated by a **school authority** or is covered by an **educational services agreement** under Section 62 (1) (b) of the *School Act* that has been approved for funding by the School Finance Branch; 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/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 English as a Second Language (ESL) needs or Francisation needs	Base Instruction (Maximum 2 years funding). ESL/ Francisation and if eligible, Enhanced ESL/ Francisation .	3 years 6 months
ECS child with severe disabilities/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

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

- c) has a **parent** who ordinarily resides in Alberta on the **September count date**; and
- d) is a Canadian citizen on the **September 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**; or
 - iv. is a stepchild (who has been issued a study permit) of a temporary foreign worker that is in Canada on a work permit; and who is the biological or adopted child of the temporary foreign worker's spouse or partner; or
 - v. is a step-child of a Canadian citizen and is the biological or adopted child of the Canadian citizen's non-Canadian spouse or partner.
- e) a **First Nations child who resides on a reserve** does not qualify as a **funded child**.
- f) an individual who is at least 5 years 6 months but less than 6 years of age on September 1, and who is either coded severe or mild/moderate, may be counted as a **funded child** (rather than as a **funded student**) if the **school jurisdiction**, the **ECS operator** and the parent agree that an **ECS program** is the most appropriate placement, and the child has had less than the maximum number of years of funding for which they are eligible.
- g) an individual who is **developmentally immature** (code 10)
- h) an individual who is at least 5 years 6 months, but less than 7 years old on September 1 may be counted as a **funded child** (rather than as a **funded student**) if they are enrolled in an **ECS program** and have special approval from the School Finance Branch.

REVISED

Funded Student

An individual who:

1. Is attending a **school** or a **blended program** in Grades 1 to 12 on the **September count date** of the current **school year**;
 - a) operated by a **school jurisdiction** or the governing body of an **accredited funded private school**; or
 - b) is the subject of an agreement under Section 62 (1)(b) of the *School Act* entered into by the student's **resident board** that has been approved for funding by the School Finance Branch, or
 - c) in another province or country under a **reciprocal exchange program** approved by Alberta Education with a student from that respective province or country.
2. Is at an age on September 1 in the **school year** in which he/she is counted, as follows:
 - a) at least 5 years 6 months old and is eligible to enter Grade 1 according to the school entrance age policy of the **school authority** that enrolls the student, but less than 20 years old; or
 - b) less than 5 years 6 months of age, is enrolled in Grade 1, and has previously attended an **Early Childhood Services (ECS) program** outside of Alberta that meets the learner expectations of the Kindergarten Program Statement; or
 - c) 6 years but less than 7 years of age and who has a mild, moderate or severe disability/delay and requires another year of ECS;
3. Is a Canadian citizen on the **September count date**; or
 - a) is lawfully admitted to Canada for permanent residence; or
 - b) is a child of a Canadian citizen; or
 - c) is a child of an individual who is lawfully admitted to Canada as a permanent or **temporary resident**; or
 - d) is a stepchild (who has been issued a study permit) of a temporary foreign worker that is in Canada on a work permit; and who is the biological or adopted child of the temporary foreign worker's spouse or partner; or
 - e) is a step-child of a Canadian citizen and is the biological or adopted child of the Canadian citizen's non-Canadian spouse or partner.
 - i. proof of application for permanent resident status and fee payment to Citizenship and Immigration Canada (CIC)
 - ii. valid study permit for child or student.
4. Has a **parent** who ordinarily resides in Alberta (*School Act*, Section 273) , on the **September count date** or is an **independent student** who ordinarily resides in Alberta on the **September count date**;
5. For funding purposes, a **First Nations student who resides on a reserve** does not qualify and is not counted as a **funded student**.
6. For funding purposes, **home education students** are excluded from all calculations that use a **funded student** count.

Group Home

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

High School Refugee Student

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). An eligible student must provide the **school jurisdiction** with a copy of the Acknowledgement of Convention Refugee Claim. 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 and to help them integrate into Canadian society.

Highway

Any thoroughfare, street, road, trail, avenue, parkway, driveway, pedway, lane, square, bridge, or other place, whether publicly or privately owned, any part of which the public is ordinarily entitled or permitted to use for the passage or parking of vehicles. This includes a sidewalk (including the boulevard portion 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.

REVISED Home Education Student

A **funded student** who:

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

REVISED Independent Student

A **funded student** who is:

1. At least 18 years of age but less than 20 years of age on September 1; or
2. At least 16 years of age but less than 20 years of age on September 1; and:

UPDATED

- a) who is living independently or apart from their parent(s) 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)

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

In the Custody of a Director

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

Institution

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

UPDATED

SCHOOL AUTHORITIES APPROVED TO PROVIDE AN EDUCATIONAL PROGRAM IN AN INSTITUTION for 2009/2010 (School Code)

Battle River RD No. 31

Camrose Women's Shelter (4554)
Ohaton Country School (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)
Youth Adult Program (9512)
Youth Attendance Centre (9687)

Chinook's Edge School Division

Grimmon House (1058)
Equinox Group Home (1453)

Edmonton Catholic Sch. District No. 7

AADAC Treatment Centre (1174)

Edmonton School District No. 7

CASA House (7713)
Counterpoint (7713)
Glenrose Hospital (7701)
Highwood (Alberta Hospital) (7701)
Howard House (7713)
Kennedale YOC (7706)
Rite Trak (McMan) (7713)
Rosecrest (7729)
Royal Alexandra Hospital (7701)
University of Alberta Hospital (7701)
WIN House (7169)
Yellowhead Youth Centre (7713)
Youth Attendance Centre (7713)

Elk Island PSD No. 14

A Safe Place (3343)

Foothills SD No. 38

Stampede Ranch (5391)

Greater St. Albert Catholic Regional No. 29

Nightwind Program (1412)

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)
Stafford Ridge School (1380)

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

Rycroft School (1055)

Sexsmith Group Home (1055)

Red Deer Public 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

Education Centre (4299)
Twin Oaks (1040)

Institutional Students

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

Levels of Support

Refers to the types of support and services being provided to the **student with special needs**. Students claimed for severe disabilities funding must receive three or more of the following types of support;

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

NEW

March Count Date

This is the specified date that **school authorities** take a second enrolment of all their students and/or children for funding purposes. This enrolment count must be done on the first instructional day of March. For the 2009 /2010 **school year**, the **March count date** shall be March 1, 2010. If March 1 is a non-instructional day for a **school authority**, then the first instructional day of March shall be used as the **March count date**.

The submission date for this count will be the third instructional day after the **March count date**. For 2009/2010, the submission date will be March 4, 2010.

Minister

Refers to the **Minister** of Education.

Online Program

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

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

Other Language Immersion Programs

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

Outreach Program

A program offered by a **school** which provides a basic education for **funded students** who are unable to attend or benefit from a regular **school** program. The requirements of the program are detailed in the **Outreach Program** Policy 1.1.4. An **outreach program** must be offered in a stand-alone facility.

Parent

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

Private Early Childhood Services (ECS) Operator

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

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

Private School

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

Reciprocal Exchange Program

UPDATED

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**. The exchange must be approved by the International Education Services Branch of Alberta Education.

Resident Board

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

Resident Student

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

Resident Student of the Government

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

Route Distance

A term used in conjunction with 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

A district or **division** that is not an **urban district**.

School

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**.

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

School Authorities

For the purpose of this Manual includes **school jurisdictions**, **accredited funded private schools**, and **private ECS operators**.

School Board

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

School Building

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

School Bus

A motor vehicle that:

1. Is owned, leased or contracted by a **school authority**;
2. Is used for the transportation of **eligible passengers**;
3. Has a passenger **seating capacity** of 12 or more; and
4. 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 this is an Alberta school district, school **division**, regional **division**, **Francophone Regional authority**, **charter school**, the Lloydminster Public School **Division**, or the Lloydminster Roman Catholic Separate School **Division**.

Schools of Choice

Refers to schools that are chosen because of the type of program being offered. Such as:

Outreach Schools, Hockey/Dance Schools, Home Education Schools, Religious Education Schools, Online Schools, Hutterite Colony Schools, Language/Cultural Schools, Schools that mainly serve **students/children with special education needs (DSEPS)**, and French Immersion Schools.

School Year

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

REVISED

September Count Date

This is the specified date that **school authorities** must take an enrolment of all their students and/or children for funding purposes. This enrolment count must be done on the last instructional day of September. For the 2009 /2010 **school year**, the **September count date** shall be September 30, 2009. If September 30 is a non-instructional day for a **school authority**, then the last instructional day of September shall be used as the **September count date**.

The submission date for this count will be the third instructional day after the **September count date**. For 2009/2010 the submission date will be October 5, 2009.

Student(s) with a Disability

A **funded student** who has been assessed and coded as having a mild, moderate or severe disability. According to the criteria and categories set out in the Special Needs Coding Criteria Handbook.

Student(s) with a Mild/Moderate Disability

A **funded student** who has been assessed and coded as having a mild/moderate disability as set out in the Special Needs Coding Criteria Handbook.

Student(s)/Child(ren) with a Severe Disability

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

Student with Special Education Needs

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 education needs.

Temporary Resident

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

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

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

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

Term

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

Term 1 — September to February

Term 2 — March to August*

Term 3 — September to August* — full year

Term 4 — July and August — summer school

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

Transportation Agreement

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

Unorganized Territory

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

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

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 a factor of 8.0.