



Education

Funding Manual for School Authorities 2005-2006 School Year

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

FUNDING MANUAL
FOR SCHOOL AUTHORITIES
2005-2006
SCHOOL YEAR

This manual is issued under authority of the following:

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

Authorized By
Minister of Education

Date

Message from the Minister

I am pleased to provide you with Alberta Education's Funding Manual for School Authorities for the 2005-2006 school year.

I have authorized this funding manual for use by school jurisdictions, charter schools, private schools, and private ECS operators to access Alberta Education funding. The manual provides details on the funding available for 2005-2006 including applicable funding rates, criteria, procedures, and reporting that is required. This funding is for the provision of approved education programs for students in grades 1 to 12 and ECS children.

A Summary of Significant Changes is included which highlights some of the changes for 2005-2006. I also encourage you to review the manual, noting the changes and revisions as indicated by the notations "New" and "Revised" in the left-hand margin.

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

Please accept my best wishes for a successful school year in 2005-2006.

Sincerely,

Gene Zwozdesky
Minister of Education
Deputy Government House Leader

SUMMARY OF SIGNIFICANT CHANGES FUNDING MANUAL FOR SCHOOL AUTHORITIES FOR THE 2005-2006 SCHOOL YEAR

The following outlines changes to the funding manual that are deemed to be significant or noteworthy for the 2005-2006 school year. Please refer to the appropriate section(s) of the funding manual for more details.

Introduction

School authorities applying for funding, must keep on file for seven years, any documents that support their funding claim(s).

Part 1: Funding for School Jurisdictions

- Section 1.2 –Base Instruction Funding: the “Declaration of Management” signed by the Board Chair, Superintendent and the Secretary-Treasurer, has been revised to more accurately reflect executive responsibilities.
- Section 1.6 -ECS Program Unit Funding: Designated Special Education ECS Programs must have a minimum enrollment of 10 program unit funded children to obtain this status or to maintain this status. Any Designated Special Education ECS Program wishing to expand to another site must apply by June 1. Also note that the terms “In-Home program” and “Home Visits” has been replaced with a new term called “Family-Oriented ECS Programming which is defined in the Glossary of Terms.
- Section 1.7-Severe Disabilities Profile Funding: For students with a severe disability in a charter school who transfer after September 30 to a funded accredited private school (or vice versa), severe disabilities funding must be transferred by the charter school to the funded accredited private school (or vice versa) on a pro-rated basis, based on a 10-month program year. Charter schools with students with a severe disability must comply with the Conditions and Requirements outlined in Section 3.3.
- Section 1.19 –Rural Transportation Funding: The Rural Transportation claim now includes a section for Rural Special Transportation.
- Section 1.20 –Urban Transportation Funding: New funding support is provided to school jurisdictions for inter-school travel. Also, the Urban Transportation claim now includes a section for Urban Special Transportation.
- Section 1.21 –Special Transportation Funding: ECS Special Transportation is now based on the number of days a child is transported -up to a maximum of 185 days. On the electronic Transportation funding claim, there is now a separate section for ECS Special Transportation.

- Section 1.26 –Daily Physical Activity Funding: New funding support is provided to school jurisdictions that will enable them to provide appropriate resources for daily physical activity programs in schools serving students in Grades 1 to 9.
- Section 1.27- Hutterite Colony Schools Funding: This new section provides funding to school jurisdictions with Hutterite colony schools that will enable them to address the higher costs associated with providing programs in these schools.
- Section 1.28 –Francophone Equivalency Access Funding: This new funding enables Francophone school authorities to provide their students access to programming that is equivalent to that being offered by English-language schools in the community, in accordance with the *Canadian Charter of Rights and Freedoms* (Section 23).

Part 2: Funding for Private ECS Operators

- Section 2.1 –ECS Base Instruction Funding: The ECS Base Instruction funding rate for private ECS operators has been aligned with the school jurisdiction Base Instruction rate by combining funding previously provided for ECS Teacher Salary Enhancement, ECS Program Enhancement Projects, and ECS Early Literacy.
- Section 2.3 -ECS Program Unit Funding: Designated Special Education ECS Programs must have a minimum enrollment of 10 program unit funded children to obtain this status or to maintain this status. Any Designated Special Education ECS Program wishing to expand to another site must apply by June 1. Also note that the terms “In-Home program” and “Home Visits” has been replaced with a new term called “Family-Oriented ECS Programming which is defined in the Glossary of Terms.
- Section 2.4 –ECS Regular Transportation Funding: Private ECS operators applying for this funding must now submit their transportation information electronically using the electronic form.
- Section 2.5 –ECS Special Transportation Funding: Private ECS operators applying for this funding must now submit their transportation information electronically using the electronic form.

Part 3: Funding for Funded Accredited Private Schools

- Section 3.3 –Severe Disabilities Funding: For students with a severe disability in a charter school who transfer after September 30 to a funded accredited private school (or vice versa), severe disabilities funding must be transferred by the charter school to the funded accredited private school (or vice versa) on a pro-rated basis, based on a 10-month program year. Also, Charter schools with students with a severe disability must comply with the Conditions and Requirements outlined in this section.

- Section 3.6 –Daily Physical Activity Funding: New funding support is provided to funded accredited private schools that will enable them to provide appropriate resources for daily physical activity programs in schools serving students in Grades 1 to 9.

Part 6: Other Provincial Support

- Section 6.2 –Regional Educational Consulting Services Funding: A new form is provided for the reporting of budget information.

Part 7: Payments to School Authorities

- Sections 7.1, 7.2, and 7.3 –Funding Rates: these have been revised to reflect Budget 2005.
- Section 7.5 –Payment Schedule for Private ECS Operators: The January payment to private ECS operators has been adjusted to better reflect their operational year and to better meet their cash flow requirements.

Glossary of Terms

- The following new definitions have been added to the Glossary: Centre-Based Programming, Clustering, and ECS Home Program.
- The name of the definition for Home Visit has been changed to Family-Oriented ECS Programming. The definition has been revised as well.

Appendices

- Appendices 1 and 3 have been revised to improve the clarity of wording.

INTRODUCTION

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

PART 1 SCHOOL JURISDICTION FUNDING

For School Boards, Francophone Regional Authorities, and Charter Schools

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

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

Section Format

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

PART 1: School Jurisdictions

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

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

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

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

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

PARTS 2 – 7: School Authorities

PURPOSE: a short statement describing the intent of the funding.

CONDITIONS: the conditions under which the funding is provided.

REQUIREMENTS: what **school authorities** must do to receive funding.

CONSIDERATIONS: other information useful to **school authorities**.

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

Information Required for Funding

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

Glossary of Terms

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

Identification of Content Changes

Users are encouraged to familiarize themselves with this document in its entirety. Changes are identified in each section with the terms “New” and “Revised”. A list of major changes is provided in the accompanying document: *Summary of Significant Changes for 2005-2006*.

CONTACT ALBERTA EDUCATION FOR ASSISTANCE

Updated

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

BRANCH	CONTACT	PHONE #
Alberta Infrastructure – Education Facilities Branch		
NORTH –	Guy Smith	(780) 422-7459
CENTRAL –	Doug Ramsey	(780) 422-0623
SOUTH –	Mike Irving	(403) 297-4563
Policy, Finance and Information Services	Tony Gnanasihamany	(780) 427-2167

The individuals named above may be contacted by e-mail by typing their first name, (.) dot, last name followed by @gov.ab.ca, (e.g., Jeff.Willan@gov.ab.ca).

The 2005-2006 Funding Manual for School Authorities is available for viewing and printing on Alberta Education's Web site at <http://www.Education.gov.ab.ca/funding/FundingManual/>.

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

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

FAX: (780) 427-2147

DOCUMENTS:

<i>Advisory Manual on Early Childhood Service for Incorporated Non-Profit Societies and Private Schools</i>	Available from the Alberta Education Web site – www.Education.gov.ab.ca Contact: Zone Branches – see Contacts for Assistance section of the Introduction.
<i>Charter School Handbook</i>	Contact: Special Programs Branch (780) 422-6326
<i>ECS Program Unit Funding. A Handbook for ECS Operators</i>	Contact: Special Programs Branch (780) 422-6326
<i>First Nations, Métis, and Inuit Education Program Guide</i>	Contact: Aboriginal Services Branch (780) 415-9300
<i>Funding Manual for School Authorities 2005-2006</i>	Available from the Alberta Education Web site – http://www.Education.gov.ab.ca/funding/FundingManual/ .
<i>Guide to Education ECS to Grade 12 (2005)</i>	Available from the Alberta Education Web site – www.Education.gov.ab.ca Click on Kindergarten to Grade 12, then select Legislation, Regulations and Policies.
<i>Guide to School Authority (School Board, Charter School, Private School) Planning and Results Reporting</i>	Available from the Alberta Education Web site – www.Education.gov.ab.ca Click on Kindergarten to Grade 12, then click on Information for Administrators select Planning Resources for School Jurisdictions.
<i>Handbook for the Identification and Review of Students with Severe Disabilities</i>	Available on the Alberta Education Web site http://www.Education.gov.ab.ca/k_12/specialneeds/identificationhandbook.pdf
<i>Kindergarten Program Statement</i>	Contact: Curriculum Branch (780) 427-2984 (780) 422-0624 (Jenny Bushrod)
<i>Policy, Regulations and Forms Manual</i>	Available from Alberta Education Web site – www.Education.gov.ab.ca To access the Manual, click on Kindergarten to Grade 12 Education then select Legislation, Regulation and Policies.

*Private Schools Reference
Manual (2003)*

Available from the Alberta Education Web site –
www.Education.gov.ab.ca

School Capital Funding Manual

Available on the Alberta Infrastructure Web site –
[http://www.infras.gov.ab.ca/content/doctype383/production/school capital manual 2002-03.pdf](http://www.infras.gov.ab.ca/content/doctype383/production/school%20capital%20manual%202002-03.pdf)
Contact: Alberta Infrastructure
Education Facilities Branch
(780) 427-7924

*Special Education Definitions
2005-2006*

Available on the Alberta Education Web site
http://www.Education.gov.ab.ca/k_12/specialneeds/specialdef.pdf

*Standards for Special Education,
Amended June 2004*

Contact: Special Programs Branch
(780) 422-6326

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

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

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

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

OR

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

OR

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

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

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

1. Unless otherwise specified, funding is for the current school year using the payment schedule and funding rates indicated in Part 7.
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 program or service for which the funding is provided. It is also expected that **school authorities** will comply with all relevant government legislation, policy, regulations, and standards when applying for funding. **School authorities** are accountable to meet the education needs of all their students, for the results achieved and for the use of resources.
4. **School authorities** are expected to:
 - a) meet the conditions and requirements outlined in this Manual. Failure to do so may result in a reduction or denial of funding, and
 - b) meet the provisions under Sections 39(1) and 47 of the *School Act*, by
 - i) ensuring that courses of study or education programs prescribed or authorized by the **Minister** are followed;
 - ii) ensuring that the amount of instructional time prescribed by the **Minister** is made available to a child or student in a school year;
 - iii) ensuring that only those instructional materials authorized or approved by the **Minister** are used in **schools**;
 - iv) ensuring that, subject to the right of a **board** to provide religious instruction, a course, an education program, or instructional material that has been prohibited by order of the **Minister**, are not used in **schools**;
 - v) ensuring that goals and standards applicable to the provision of education are met; and
 - vi) providing access to special education programming for students in need of special education.
 - c) meet the applicable requirements of the *Government Accountability Act* and the *Financial Administration Act*.

5. The documents listed in this Manual in the Introduction under “References and Where to Find Them” should be used by **school authorities** as companion documents to the *Funding Manual for School Authorities* and should not be used exclusive of one another.
- Revised** 6. **School authorities** applying for funding shall keep on file, for seven years, the documents required to support their claim for each type of program funding described in this Manual, including invoices, and the following information:
- a) an eligible enrolment count as of the **count date** (September 30) of the current school year or if September 30 is not a **school** day, the enrolment count for the next **school** day following September 30;
 - b) copies of current **educational service agreements** or **transportation agreements**;
 - Revised** c) a record of the daily attendance of each enrolled student and also for high school students, the master timetable and student timetables and documents listed in Section 1.2;
 - d) a list of **schools**, teachers and administrators involved in each program.
7. Alberta Education reserves the right to request and review documentation to substantiate data submitted that determines funding allocations and that assists in conducting financial and other reviews. These reviews may be conducted off-site or on-site in a **school authority**.
8. An adjustment may be made in a payment or a penalty may be levied when a review or audit by Alberta Education indicates that:
- a) a **school authority** has received funding to which it was not entitled - no limitation period; and
 - Updated** 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.
- Revised** 9. Payments in January, and subsequent payments shall be withheld from **private ECS operators** if the Audited Financial Statements or the Budget Report has not been properly completed in accordance with the respective Guidelines and submitted to the School Reporting Branch by the due date. When the documents have been submitted and determined to be acceptable, payments will be released.

Revised

10. Payments may be withheld from **school jurisdictions** and **funded accredited 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**, has not been properly completed in accordance with the respective Guidelines and submitted by the due date. When the documents have been submitted and determined to be acceptable, payments will be released.
11. **School authorities** must develop, keep current, and implement applicable written policies and procedures that are consistent with policies in Sections 1 and 2 of the *Policy, Regulations and Forms Manual*.
12. **ECS operators** who have received funding from Alberta Education to provide an **ECS program** and have decided to cease operation may be required to return a portion of their accumulated operating surplus to the Minister of Finance.
13. The **Minister** may fund a **school jurisdiction**, other person, or organization for purposes related to the education of **children** in **early childhood services programs**, or students in **school** programs that are in addition to the funding provisions of this Manual.
14. A budgeted annual operating deficit for an upcoming school year is acceptable if, and only if, sufficient accumulated operating surplus (AOS) funds are available to cover the planned shortfall without impairing the long-term financial health of the **school jurisdiction**. A **school jurisdiction** failing to submit an acceptable budget will be expected to work with Alberta Education to achieve expected financial results, and may be subject to an inquiry under Section 41 of the *School Act* and to the appointment of an official trustee under Section 42 to conduct the affairs of the **school jurisdiction**.

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

PRINCIPLES AND PILLARS OF THE RENEWED FUNDING FRAMEWORK

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

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

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

PRINCIPLES:

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

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

FLEXIBILITY, ACCOUNTABILITY AND FUNDING PILLARS

FLEXIBILITY PILLAR

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

LIMITATIONS:

1. The maximum expenditure for system administration and board governance will continue to be between 4.0 and 6.0 percent depending on the student enrolment of the **school jurisdiction**. To determine the maximum expenditure the applicable percentage is applied to a jurisdiction's total expenditures as outlined in the Guidelines published by the School Reporting Branch.
2. Transfers of Alberta Education revenues into or out of Operations and Maintenance and/or School Capital are not permitted, as these funding areas are the responsibility of Alberta Infrastructure.
3. Funding provided to support kindergarten to Grade 12 programs cannot be used to support courses, programs or training for adults (20 years and older). Please see Policy 1.9.2 of the K-12 Education Support Policy, *Regulations and Forms Manual* for more details.
4. Provincial Priority Targeted Funding is allocated for specific priority programs as determined by Alberta Education. For the 2005-2006 school year these areas are the Alberta Initiative for School Improvement, Student Health Initiative, High Speed Networking (Supernet), the Small Class Size Initiative, and, Children and Youth with Complex Needs. Funding for these initiatives must be spent in the area for which it was provided.
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: Program Unit Funding, Francophone Education Funding, French Language Funding, Institutional Programs Funding, Regional Educational Consulting Services Funding, Education Resources Credit, Regional Consortium Funding, and Debt Retirement.

Revised

ACCOUNTABILITY PILLAR

Revised The Accountability Pillar places increased emphasis on achievement of outcomes, reporting of results and targets, and using results for informed decision-making for the purpose of improving programs and student results in subsequent years. The renewed Funding Framework provides flexibility in how funding allocations are used and increases emphasis on local accountability for results, with a focus on improvement. School board performance will be measured and reported by assessing current results against past performance, achievement and improvement on a common set of measures. There are six categories of measures:

- student achievement
- student learning opportunities;
- safe and caring school environment;
- preparation for lifelong learning, world and work and citizenship;
- **parent** involvement; and
- continuous improvement.

School jurisdictions will set targets for measures that have historical data or benchmarks. Targets will be set for new measures once baseline data has been collected. Target levels are expected to be met and action taken if improvement is needed. School boards continue to be accountable for meeting the education needs of all students, for ensuring provincial policy, legislation, regulations and standards are met, and for reporting on allocation and use of funds.

School jurisdictions continue to prepare Three-year Education Plans and assess and report on the results annually in Annual Education Results Reports (AERRs), as required by the *Government Accountability Act*. Jurisdiction plans and reports will contain the enhanced accountability requirements.

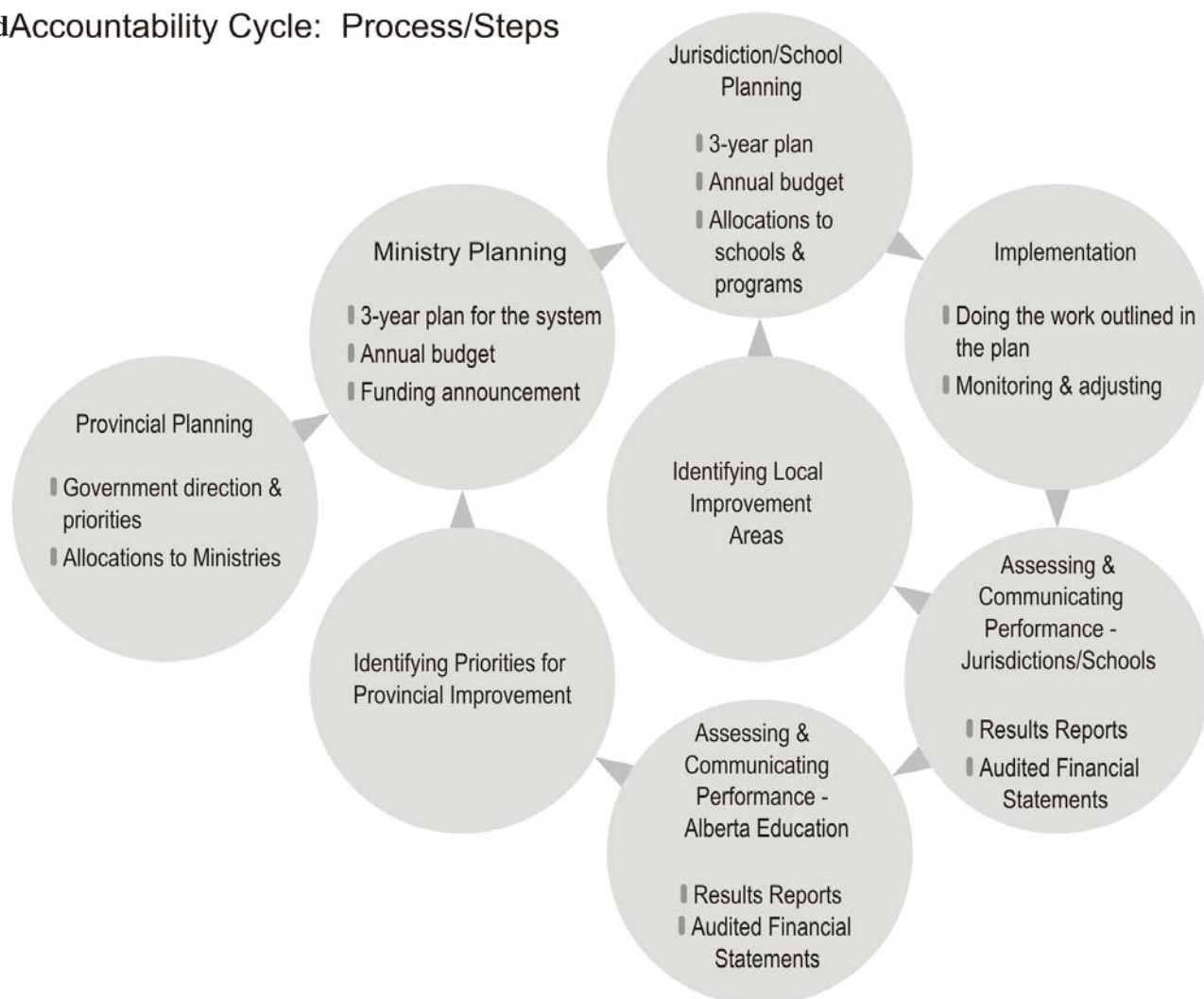
Accountability Framework for ECS to Grade 12 Education

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

- setting priorities, measuring progress, and using results to develop actions to improve student programs and achievement;
- aligning jurisdiction and provincial goals and priorities;

- incorporating community output;
- allocating resources to achieve goals and improve results; and communicating with stakeholders (staff, students, **parents**, **school** councils, the public, and Alberta Education) about **school jurisdiction** and **school** directions and results.

Revised Accountability Cycle: Process/Steps



Each level in the Accountability Framework plays a key role.

GOVERNMENT OF ALBERTA

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

ALBERTA EDUCATION**Revised**

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

SCHOOL JURISDICTIONS

- plan and implement three-year education plans aligned with Ministry direction;
- allocate resources to **schools** and programs;
- monitors progress;
- assess and report results annually to stakeholders;
- use results to set targets and plan improvements.

SCHOOLS

- plan and implement three-year education plans aligned with **school board** direction;
- monitor progress;
- assess and report results annually to their **board** and stakeholders;
- use results to set targets and plan improvements.

Revised The performance of **school jurisdictions** will be assessed on the accountability measures, and results will be evaluated against past performance, achievement and improvement. **School jurisdictions** and Alberta Education will work collaboratively to develop strategies to improve results in those areas where performance has not improved or has declined.

The guidelines and requirements for **school jurisdiction** Three-year Education Plans and Annual Education Results Reports (AERRs) are contained in the *Guide to School Board Planning and Results Reporting*. The 2005 edition of the guide contains the set of accountability measures in relation to the required provincial goals and outcomes, information on the phase-in of the measures, the assessment of results and action planning to address areas requiring improvement. The Guide also includes updated information on target setting and surveying.

FUNDING PILLAR

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

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

Base Instruction funding is provided on a per student basis for every full-time equivalent (FTE) student from early childhood services to grade 12.

Revised Differential Cost funding is allocated for specific student population types and is based on distribution formulas designed to address variable cost factors. Specific student populations include: **Children and Students with a Severe Disability/Delay**, English as a Second Language/Francisation students, First Nations, Métis, and Inuit students, Early Childhood Services children with mild or moderate disabilities and those who are gifted and talented, the percentage of the student population of a **school jurisdiction** experiencing low Socio-Economic Status (SES). Students are specifically identified for each factor, except for **students with severe disabilities** and SES. Funding for **students with severe disabilities** is based on a separate profile for each **school jurisdiction**. SES is calculated on the general student population of the **school jurisdiction** and an incidence rate relative to the jurisdiction. It is derived from census data provided by Statistics Canada. Each of the factors is assigned a relative weighting that recognizes the differential cost of providing service to students.

Revised The distribution formulas are also designed to address variable cost factors, such as, small schools by necessity, year to year enrolment fluctuations, the enrolment size of **school jurisdictions**, **schools** located in the north, the cost differences among local **school jurisdictions** for purchasing goods and services, resources for daily physical activity in grade 1-9 schools, support for Hutterite colony schools and support for francophone students to have equivalent access to programs.

REVENUE SOURCES FOR SCHOOL JURISDICTION FUNDING

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

- The Alberta School Foundation Fund (ASFF) provides payments on an equal amount per eligible student ⁽¹⁾; and
- The General Revenue Fund (GRF) provides grants authorized by the **Minister**.

Alberta School Foundation (ASFF)

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

The equal amount per **eligible student** from the ASFF is calculated by dividing the total requisition revenue collected by the province and opted out separate school boards by the total number of **eligible students**. All school boards will receive this dollar amount per **eligible student**.

When a separate school board has opted out of the ASFF and the local requisition per student is less than the ASFF payment per **eligible student**, the difference will be paid from the ASFF. If the local requisition is more than the ASFF payment per **eligible student**, the difference must be paid into the ASFF.

General Revenue Fund (GRF)

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

¹ For an opted out separate school board, the sum of the ASFF payment provided by the province and the tax revenue collected from the board’s declared ratepayers would equal the ASFF payment the separate board would otherwise receive if that board participated fully in the ASFF.

Payment of a Funding Allocation

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

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

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

ALLOCATION FORMULA

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

ALLOCATION CRITERIA

1. Base instruction funding is provided to **school jurisdictions** for each **funded child** enrolled in an **ECS program** which provides access to at least 475 hours of instruction.

Note: Some modification to this requirement is allowed for **children with special needs** (mild, moderate, or severe and gifted and talented) who because of their special needs or young age can not be accommodated by a 475-hour program (ie. they may require fewer hours). Also some **children with special needs**, either because of their disability or young age, may benefit from a combined program involving **school** hours and **family-oriented ECS programming** sessions (formerly home visits). A combined program must have a minimum of four **family-oriented ECS programming** sessions to qualify for funding. See definition of **family-oriented ECS programming** in the Glossary of Terms for more details.

2. An approved **ECS operator** must be prepared to accept and organize programming for all **funded children** for whom programming is requested, including **children with special needs**.
3. A child referred to in Section 30(1)(a) of the *School Act* is not a resident or non-resident student of a **board**, therefore, **school jurisdictions** shall not use the residency or non-residency of the **parent** of a child in a district or **division** to:
 - a) deny a funded child access to the program; or
 - b) differentiate fees charged for the program.
4. The ECS count must not include any **funded child** counted by another **ECS operator** for funding purposes in the school year. A **funded child** can only be claimed by one **ECS operator** per year. The **school jurisdiction** claiming the **funded child** is responsible for ensuring the **funded child** was not claimed by another **ECS operator** in the current school year.

However, if a **funded child** is attending more than one **ECS program** on September 30 and a resolution cannot be reached as to which **ECS operator** should count the **funded child**, then the ECS Base Instruction funding will be split accordingly. For example, a **funded child** may be enrolled in a morning program with one **ECS operator** and also enrolled in an afternoon program with another **ECS operator**.

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

5. **School jurisdictions** are eligible for one year of ECS Base Instruction funding for regular ECS **funded children**. **Funded children** must be at least 4 years 6 months of age and less than 6 years of age on September 1. The minimum age may vary depending on the school entrance age policy of the **school jurisdiction** the **funded child** will enter. Alberta Education will not provide more than one year of funding for a regular ECS **funded child**.
6. A **funded child with a disability/delay** may qualify for more than one year of funding. See definition of **funded child** in the Glossary of Terms.
7. Alberta Education provides funding for a basic 475 hour **ECS program** which includes support for instructional salaries and benefits, learning resources, furnishings and equipment. **School jurisdictions** may not charge a fee for services provided within the basic 475 hour program.
8. A **school jurisdiction** may charge a fee to **parents** of **funded children** in a basic 475 hour program to offset non-instructional costs such as supplies, snacks and field trips.
9. **School jurisdictions** that offer an **ECS program** with more than 475 hours may charge a reasonable fee to cover the cost of the additional program hours.
10. Individuals aged 5 years and 6 months or older, but less than 6 years of age on September 1 are counted as **funded students** (rather than as **funded children**) if they are eligible to enter Grade 1 under the school entrance age policy of a **school jurisdiction**. The exceptions to this are:
 - a) if the **funded child** has spent less than the number of years in the program for which he/she is eligible for funding, i.e., received less than three years of program unit funding; or
 - b) if the **funded child** has not enrolled in an **ECS program** prior to this age; or
 - c) if the **funded child** has been identified as **developmentally immature** (Code 10). This child is not eligible for special needs funding and should not have been identified as special needs in prior years.

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

11. Individuals aged 6 years or older, but less than 7 years of age on September 1 are counted as **funded students** except individuals who are in an **ECS program** and are:

- a) **developmentally immature** (Code 10); or
- b) entering an **ECS program** for the first time.

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

12. An individual who is eligible to proceed to Grade 1, but has been identified as **developmentally immature** and whose program plan involves both ECS and Grade 1 instruction may be counted either as a **funded child** or as a **funded student**.

13. Individuals aged 6 to 7 years old, who require another year of ECS and who have been assessed as having special needs (mild, moderate, severe or gifted and talented) must be counted as **funded students**.

14. Under no circumstances can an individual be counted as both a **funded student** and as a **funded child** in the same school year.

15. A **school jurisdiction** that receives provincial funding must ensure that **parents** can access a basic **ECS program** of 475 hours for their **funded children** without any charge for instruction.

- New 16. When a **funded child** (not a special needs child) lives in a remote area and where there is no ECS **school** program within a reasonable transportation **distance**, the **school jurisdiction** may provide an **ECS home program** so that the child may have the opportunity to experience an **ECS program**. The program must be planned, delivered and evaluated by a certificated teacher. Twenty-two visits to the family home for a minimum of 1.5 hours each is 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**.

DOCUMENTATION AND REPORTING REQUIREMENTS

1. Funding for ECS Base Instruction is made on the basis of **funded child** registration information submitted to the Information Services Branch.
 2. For **ECS programs** beginning in September, the **count date** is September 30 and the information must be submitted by October 5 to the Information Services Branch.
 3. For **ECS programs** beginning after September 30, the count will be taken as of the last **operating day** in the month in which the **ECS program** begins. The information must be submitted within three weeks of that day to the Information Services Branch.
 4. Adjustments to enrolment data:
 - a) if an adjustment is required to the enrolment data reported to the Information Services Branch, **school jurisdictions** must ensure that changes are made to their modification file.
 - b) after receiving your first Revenue Allocation and Credit Enrolment Reporting System (RACERS) data, any modification required can be submitted using the “Add, Modify, Delete” form in the Funding Events Systems (FES) or using the paper form (Form 05AE1.2c), by the April 28 deadline.
 5. An **ECS home program** must be approved by the Director of the Governance and Program Delivery Branch on an individual child basis.
- New

ADDITIONAL INFORMATION

1. **School jurisdictions** may use funds provided by Alberta Education for ECS to Grade 12 programs to meet the learning needs of all their **funded children** and **Revised funded students**. (Subject to the Limitations listed in the Section entitled Principles and Pillars of the Renewed Funding Framework).
2. Refer to Part 7, Section 7.7, Enrolment Counts and Conflicts, for additional information.

FEES AND DEDUCTIONS

Portable Classroom Rental Fee:

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

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

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

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

REFERENCES

Kindergarten Program Statement Revised September 2000

Early Childhood Services Policy 1.1.3

Early Childhood Services Regulation AR 31/2002

School Capital Manual, Alberta Infrastructure, April 2002

New Program Unit Funding: A Handbook for ECS Operators

ALLOCATION FORMULA

1. Up to 60 CEUs for a school year (September to August), including CEUs completed in Integrated Occupational (IO) courses and regular programs, will be funded for each Grade 10 to 12 **funded student**.

- a) Base Instruction – Grades 1-12:

$$\begin{aligned}
 &\text{Base Instruction Allocation} = \left[\text{Number of } \mathbf{\text{funded students}} \text{ in Gr. 1-9} \right] \times \left[\text{Base Instruction Rate} \right] \\
 &+ \left[\text{Number of CEUs completed by } \mathbf{\text{funded students}} \text{ in Gr. 10-12 (includes regular day, weekend, evening and summer courses and IO courses at 5/3)} \right] \times \left[\text{CEU Rate} \right] \\
 &+ \left[\text{Number of } \mathbf{\text{students with special needs}} \text{ in Gr. 10-12} \right] \times \left\{ 35 \text{ CEUs} \times \left[\text{CEU Rate} \right] \right\}
 \end{aligned}$$

ALLOCATION CRITERIA

1. **School jurisdictions** must provide students with access to:
 - a) up to 950 hours of instruction for Grade 1;
 - b) a minimum of 950 hours of instruction for Grades 2 to 9;
 - c) a minimum of 1000 hours of instruction for Grades 10 to 12; and
 - d) a minimum of 25 hours of instruction per high school credit timetabled for both the student and teacher in the same time period.
2. Base instruction funds are provided to a **school jurisdiction** for each **funded student** in Grades 1 to 12. Included in this funding are funds to support programming for students with mild or moderate disabilities and students who are gifted and talented.

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

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

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

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

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

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

“As the Superintendent and Secretary-Treasurer, we certify that the Credit 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*. As the Board Chairman, Superintendent, and Secretary-Treasurer, we support the education practices of the jurisdiction and affirm that the policies of the jurisdiction are in alignment with the intent of education funding to provide a quality education that best meets the needs of students.”

This declaration will be included in RACERS and must be printed, signed and submitted to School Finance. The Declaration of Management form can also be found in the Forms section of this Manual as Form 05AE1.2d. The declaration will be considered part of the accountability of **school boards** in reporting CEUs for funding and programming purposes.

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

- a) a regular course (non-CTS) is considered completed for funding purposes when:
 - i) a student has earned a final mark of 50% or better in the course; or
 - ii) a student has:
 - a.) earned a final mark of 25% or greater but less than 50% in the course, and
 - b.) has attended at least 50% of the classes in the course or has worked on and been assessed on at least 50% of the course content.

Revised

When a student changes from one course to another within an academic program in the same term (e.g. student switches from Social Studies 10 to Social Studies 13), **school jurisdictions** shall only claim one course for funding.

Updated

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

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

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

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

9. Funding for Funded Students in Grades 10 to 12

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

- a) funding is provided on a credit enrolment unit (CEU) basis for senior high school courses completed during regular daytime hours, weekends, evening and the summer months, with a maximum of 60 CEUs funded per student per school year (September to August). For Senior high school courses with a credit value of 3, funding is based on 2.5 CEUs. For courses with a credit value of 5, funding is based on 5 CEUs. For courses with a credit value of 1, funding is based on 1 CEU;
- Revised**b) funding is provided for credits in senior high school courses completed during weekends (Saturday and Sunday), statutory holidays, evenings (after 6:00 p.m.), and during the summer break, if instruction is provided for a minimum of:
 - 80 hours for a five credit course; or
 - 48 hours for a three credit course;
- c) funding is provided for credits in Alberta Distance Learning (ADL) courses paid by a **school jurisdiction** for students whose marks are reported by the ADLC;
- Revised**d) funding is provided for RAP, Work Experience, and other credit courses involving substantial off-campus instruction;
- e) funding is provided for repeated courses as long as instruction is provided in accordance with the same requirements as the first time the course was taken. Funding is not provided for students repeating courses where they previously received a mark of 100 percent in the course;
- f) funding is provided for high school credit courses completed that may not otherwise be counted towards a high school diploma (e.g. ESL 1125);
- Updated** g) funding is provided for credits earned through locally developed senior high school credit courses, where instruction is provided, and if the school jurisdiction is authorized to deliver the course (see Guide to Education –section on Locally Developed/Acquired and Authorized Junior/Senior High Optional Courses).
- h) funding is provided for credit-bearing religious education courses, where instruction is provided;
- i) funding is provided for credits in Special Projects 10 – 20 – 30 courses;
- Revised** j) funding is provided for students in senior high school who take a junior high course for 125 hours; the equivalent of 5 CEUs will be funded for each course completed (Form 05AE1.2a);

- k) for **students with special needs** (identified with the 500 Grants code) who on September 30 are classified as senior high students, funding is provided based on 35 CEUs. Additional funding based on CEUs will be provided for course credits completed in the summer months by **students with special needs**;
- l) Integrated Occupational (IO) courses credits completed will be converted to CEUs at 5/3 times the credit value;
- m) students registered on September 30 and enrolled in at least one of the following ESL courses: ESL 1120, 1121, 1123 or 1125, will be funded at the rate of 17.5 CEUs per student per semester of ESL courses taken. No additional funding is provided for other courses completed during these semesters. Students taking ESL courses or non-ESL courses during the summer term will be funded on a CEU basis;
- n) funding is provided for credits granted through **challenge assessments** at 20 percent of the CEU value for the course(s) challenged;
- o) when a student takes two French as a Second Language courses by instruction in the same term only one course will be funded;
- p) funding based on 35 CEUs is provided for senior high school students enrolled in Institutional programs (Code 550) on September 30;
- q) for Grades 10 to 12, 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;
- r) funding based on the Base Instruction rate is provided for each Alberta **funded student** who is on a **reciprocal exchange program** approved by Alberta Education; and
- s) funding is provided for Alberta **funded students** enrolled with a Lloydminster school division high school on September 30.

10. **CEU Funding Penalty Schedule**

Updated/New

- a) A 10% funding reduction penalty will be applied for the following Access to Instructional Hours violations:
 - i) Courses where access to instruction is found to be less than 25 hours per high school credit (20.8 hours per credit for a 3 credit course).
 - ii) When a school timetables several high school courses in the same block and the access to instruction for courses offered is found to be less than 25 hours per credit.
 - iii) Courses/classes with unreasonably high enrollments where it is determined that it is not reasonable or even possible for a large number of students to have access to 25 hours of instruction per credit.

- iv) Where a high school student does not have access to at least 1000 hours of instruction.
- b) A 100% funding reduction penalty will be applied when:
 - i) Courses taught did not follow the Program of Studies.
 - ii) A school that has been assessed a penalty previously, continues to be non-compliant.
 - iii) Courses have both access to instruction and Program of Studies contraventions.
- c) A 75% funding reduction penalty will be applied when:
 - i) Special Projects do not meet the programming requirements set out in the Guide to Education.

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

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

- a) waived or retroactive credits;
 - b) maturity credits;
 - c) courses completed by non-resident students and **First Nations students with status who reside on a reserve**;
 - d) high school credits taken by junior high school students (except for summer courses, if the student taking the course is eligible to enter Grade 10 in the next school year). This includes CTS courses completed by students in junior high school and Heritage Language high school credit courses;
 - e) post-secondary courses, including those that have been approved as locally developed courses;
 - f) credits granted through evaluation of out-of-province courses; or
 - g) extra-curricular, co-curricular, or community-based activities such as competing on an athletic team.
12. When a student meets the criteria of a **funded student** and is attending a **school** in Canada that is providing both an academic and an **activity program**, and a comparable program is not available in Alberta, and the **student** has been selected by **audition** or other substantive selection method to be part of the program, he or she may be funded depending on individual circumstances. The **resident board** is required to have an approved tuition agreement under Section 62(2) of the *School Act*. The tuition agreement must be approved by the **Minister** and should be submitted to the Governance and Program Delivery Branch. Once a tuition agreement is approved, students are eligible for funding under this section only.

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

- a) The **DSEPS** must advise **parents** of the need to discuss their child's mild or moderate disability, or gifted and talented special needs eligibility and programming options with their **resident board** prior to enrolment 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:

- i) a **school** official of the **resident board** (e.g. the Principal or Special Education Coordinator) must inform the **parent(s)** that their child has been assessed as having a mild or moderate disability or gifted and talented special need;
- ii) the **resident board** must offer and explain to the **parent** what type of special education programming the **resident board** can provide for the student;
- iii) if, after being advised of the program the **resident board** can provide, the **parent(s)** decides to enroll their child in a **DSEPS**, the **parent(s)** must notify the **resident board** that their child is leaving the **school** to go to a **DSEPS**.

New The **resident board** official must retain a record of the discussion with the **parent(s)** to document the **parent** consultation.

When the **student with a mild or moderate disability** or who is gifted and talented is enrolled in a **DSEPS**, funding of \$9,353 per student will be paid directly to the **DSEPS**, with no cost to the **resident board** if enrolment occurs on or before September 30. These students must be coded by the **DSEPS** using the funding codes 110 and 500 with the applicable special needs 50s code (mild/moderate) or 80 code (gifted and talented).

If a **parent** enrolls their child in a **DSEPS** without consulting with the **resident board** on the child's eligibility for special education programming, the **DSEPS** will only be eligible for funding of \$5,825 (rather than the funding of \$9,353) for these students. These students must be coded by the **DSEPS** using the funding code 500 with the applicable special needs 50s code (mild/moderate), or 80 code (gifted and talented). The 110 code cannot be used for these students.

The **DSEPS** will report all students enrolled on September 30 in their **schools** to the Information Services Branch. **DSEPS** will also notify **school jurisdictions**, in writing, of their **resident students** who registered at the **DSEPS**. The **DSEPS** will also forward a copy of this notification list by December 15 to the Director of School Finance, Alberta Education, confirming which students' parents discussed placement options with their resident

school jurisdiction and which did not. This confirmation will determine the **DSEPS** Base instruction funding rate paid by Alberta Education.

- b) For students with a mild or moderate disability or students who are gifted and talented enrolled with a **school jurisdiction** on September 30 who transfer to a **DSEPS** after September 30 in the current school year (or vice versa), funding will no longer be required to be transferred by the **school jurisdiction** or by the **DSEPS** on a pro-rated basis.
- c) No pro-rated Base instruction funding will be provided by Alberta Education to the **DSEPS** for students enrolled after September 30.
- d) A **school jurisdiction** that directs a student to a **DSEPS** will pay all program costs that are not covered by funding provided by Alberta Education to the **DSEPS**.

DOCUMENTATION AND REPORTING REQUIREMENTS

1. Base instruction funding is based on:
 - a) Student registration enrolments in Grades 1 to 9 as of September 30 that is submitted to the Information Services Branch by October 5;
 - b) Course completion information for students in Grades 10 to 12 as follows:
 - i) Student Information System for specific enrolment;
 - ii) Student Records System/Course Information Database System (CIDS) for course marks;
 - iii) **schools** are required to maintain and retain for a period of 7 years, records of student attendance, final marks, course outlines, detail assessment records for student work in the course and records of course withdrawal for students in Grades 10 to 12.
 - c) Student information on Form 05AE1.2b for students attending First Nations **schools**.
 - d) Student information on Form 05AE1.2a for senior high students taking junior high courses.
 - e) See Part 7, Section 7.7 for information on Enrolment Counts and Conflicts.
2. Adjustments to enrolment data:
 - a) If an adjustment is required to the enrolment data reported to the Information Services Branch on September 30, **school jurisdictions** must ensure that changes are made to their modification file.

- b) After receiving your first RACERS data, any modification required can be submitted using the “Add, Modify, Delete” form in the Funding Events System (FES) or using the paper form (Form 05AE1.2c), by the April 30 deadline.
- 3. Base Instruction funding for **funded students** attending **school** in another province will be based on:
 - a) a copy of the agreement under Section 62(2) of the *School Act*; and
 - b) a letter indicating the student's name, birth date and grade and Alberta Student Number (ASN).
- 4. Base Instruction funding for **funded students** that are attending a First Nations **school** will be based on:
 - a) a copy of an agreement under Section 62(2) of the *School Act*; and
 - b) Form 05AE1.2b
- 5. Funding for **students with special needs** who are directed by the resident **school jurisdiction** to another **school jurisdiction** under an **educational services agreement** will be provided as follows:
 - a) The providing/registering **school jurisdiction** will register the student using the 140 Code with the 500-grant Code, the appropriate special needs code, and the resident **school jurisdiction's school authority** code.
 - b) Using the Code 140, ensures the student is included in the resident **school jurisdiction's** September 30 headcount and all related funding is provided by Alberta Education to the resident **school jurisdiction**. This ensures that the resident board maintains responsibility for the student. No funding is provided by Alberta Education to the providing/registering **school jurisdiction**. Payment for a student's program is the responsibility of the resident **school jurisdiction**.
 - c) For **students with severe disabilities** coded as 140, the resident **school jurisdiction's** severe disabilities profile number will not be adjusted; therefore the resident **school jurisdiction's** severe disabilities funding will remain unchanged.
 - d) The 140 Code cannot be used with students coded as 110, 145, 600, or 610.
 - e) The 140 Code can only be used by **school jurisdictions**. The 140 Code cannot be used by **private schools, Designated Special Education Private Schools (DSEPS) or private ECS operators**.
 - f) RACERS will provide a report of **resident students** who have been coded as 140 by another **school jurisdiction**.

ADDITIONAL INFORMATION

FEES AND DEDUCTIONS

1. Access Copyright (formerly Cancopy):

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

2. EduLink:

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

The College of Alberta School Superintendents (CASS) and Association of School Business Officials of Alberta (ASBOA) have agreed their membership will provide the necessary funds to support EduLink for a three-year period – from September 2002 to August 2005. Alberta Education will deduct approximately 35¢ plus GST per **funded student** and **funded child** on behalf of all participating **school jurisdictions** and **charter schools**. This deduction will be made in September and based on the prior year frozen **funded student** and **funded child** count. The deduction will be reflected on the September funding statement. It is up to the individual **school jurisdictions** and **charter schools** to apply for any GST rebate from the Government of Canada.

Alberta Education will forward the maintenance fee of \$195,000 to Edmonton Catholic Schools, the host **board**. This funding will provide for the annual maintenance budget but is not sufficient to pay for significant changes to the software.

3. Alberta School Boards Association (ASBA):

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

ALLOCATION FORMULA

1. The allocation for Base Instruction in **outreach programs** is calculated using the Allocation Formulas described in Section 1.2 of this Manual for **funded students** in Grades 6 to 9 and CEU funding for **funded students** in Grades 10 to 12.
2. A **school jurisdiction** will receive outreach base funding for each Alberta Education approved **outreach program** to offset some of the higher costs associated with running an **outreach program**.

ALLOCATION CRITERIA

1. The Allocation Criteria and Documentation and Reporting Requirements outlined in Section 1.2 also apply for this section.

DOCUMENTATION AND REPORTING REQUIREMENTS

- Revised
1. Applications for approval to begin new **outreach programs** must be submitted by March 1 to your Zone Services Branch Director using Form 05AE1.3. Alberta Education may not approve all applications.
 2. Where an **outreach program** ceases to operate, the **board** must immediately notify the respective Zone Services Branch Director. Where the **outreach program** is operating as a **school** and the **school** is closing, the **board** must notify the **Minister** of the **school** closure as per the *Closure of School Regulation* AR 238/1997, as amended.

ADDITIONAL INFORMATION

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

REFERENCES

Outreach Program Policy 1.1.4

Standards for Special Education, Amended June 2004

Guide to Education: ECS to Grade 12, 2005

Alberta Education Programs of Study

Outreach Programs Handbook

ALLOCATION FORMULA

1. Home Education:

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

PLUS,

- a) 50 percent of the compulsory Alberta Distance Learning (ADL) course costs for **home education students** enrolled in Grades 7 to 12, as paid for by the **supervising board**, not exceeding the home education funding rate; and
- b) the compulsory ADL course costs for **home education students** in Grades 1 to 6 taking a full course load of ADL courses which exceed the 50 percent funding provided by the **supervising board** to home education **parents**. (Refer to Form 05AE1.4b).

2. Blended Program (as defined in the Glossary of Terms):

$$\text{Blended Program Allocation for each Funded Student} = \left\{ \text{Percentage of School provided Program} \times \text{Base Instruction Rate} \right\} + \left\{ \text{Percentage of the Home Education Program} \times \text{Home Education Rate} \right\}$$

PLUS,

The lesser of:

- a) 50% of the compulsory ADL course costs; and
- b) the result of $\text{Percentage of the Home Education Program} \times \text{Home Education Rate}$

The total funding for a **blended program** is the sum of all the amounts determined for each of the **funded students** in **blended programs**.

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

ALLOCATION CRITERIA

1. Funding may be provided to the **supervising board** for **home education students** the **board** has agreed to supervise and provide with education resources. The education programs for these students must be consistent with the student learning outcomes described in the Alberta Programs of Study or stated in the schedule attached to the *Home Education Regulation*.
2. Additional funding may be provided to the **supervising board** for **home education students** in Grades 7 to 12 enrolled in the Alberta Education Program of Studies through the Alberta Distance Learning Centre (ADLC) or through Distance Education Consortia operated by **supervising boards** in courses to maximum of 50 percent of the cost of the registration fees and the compulsory learning materials for these courses. The cost of Alberta Distance Learning (ADL) courses funded by Alberta Education for a **home education student** in a school year will not exceed the home education funding rate. This funding may be claimed on Form 05AE1.4a.
3. Additional funding may be provided to the **supervising board** for **home education students** in Grades 1 to 6 taking a full course load of ADL courses where the total compulsory course costs (net of any refundable deposit) exceed the 50 percent funding provided by the **supervising board** to the home education **parents**. This funding may be claimed on Form 05AE1.4b.
4. Students enrolled in Grades 1 to 9 who are participating in a **blended program** and accessing 50 percent or more of their education program at **school** may be claimed as **funded students** by the **supervising board**. However, Alberta Education will prorate the funding based on the percentage of the student's program taken at **school**, and the percentage of the student's program taken at home.
5. Students enrolled in Grades 10 to 12 who are participating in a **blended program** and accessing 20 percent or more of their education program at **school** may be claimed as **funded students** by the **supervising board**. However, Alberta Education will prorate the funding based on the percentage of the student's program taken at **school**, and the percentage of the student's program taken at home.
6. In accordance with Section 8 of the *Home Education Regulation*, a **supervising board** shall provide to a **parent** of a student enrolled in a **blended program** an amount of money using the percentage of the home education rate which is in proportion to the percentage of the program or courses provided by the **parent**.
7. When a student moves from one **supervising board** to another after September 30, and the receiving **supervising board** agrees to purchase ADL courses and related resources from the Learning Resources Centre, Alberta Education will pay for 50 percent of the course costs to a maximum of the home education funding rate for the combined ADL purchases of both **supervising boards**. This funding may be claimed on the applicable Form, 05AE1.4a, for Grades 7 to 12 and 04AE1.4b, for Grades 1 to 6.

8. **Home education students** and their **parents** must live in Alberta on September 30 of the current school year.
9. A **supervising board** must offer annually 50 percent or more of the home education rate to the **parents** of **home education students** for the purchase of Programs of Study and instructional materials.

DOCUMENTATION AND REPORTING REQUIREMENTS

1. Home education funding is based on:
 - a) student registration information in Grades 1 to 12 as of September 30 that is reported to the Information Services Branch by October 5; and
 - b) report of ADL courses for **home education students** on Form 05AE1.4a;
 - c) report of additional ADL course costs for Grades 1 to 6 on Form 05AE1.4b.
2. **School jurisdictions** shall have home education policies in place that indicate which Program of Study and instructional materials will be considered for reimbursement and the amount of reimbursement for students in **blended programs**.
3. The **school jurisdiction** must annually conduct at least two evaluations of their **home education students'** progress.

ADDITIONAL INFORMATION

1. Funding for a **supervising board** for each student enrolled in a **blended program** on the September 30 **count date** is the sum of the calculations in (a) and (b) as follows:
 - a) multiply the percentage of the student's **school** provided portion by the Base Instruction funding rate for **supervising boards**, plus
 - b) multiply the percentage of the student's home education portion by the home education rate including 50 percent of the ADL course costs to the pro-rated portion of the maximum.

Example 1:

A student in a home education program 40 percent of the time using ADL courses and in a regular **school** program 60 percent of the time would be funded as follows:

Home education rate	40%	X	\$1,272	=	\$508.80
Plus ADL course costs to a maximum of 40 percent of home education rate	40%	X	\$1,272	=	\$508.80
Plus the Regular school rate (for the applicable grade)	60%	X	\$5,087	=	<u>\$3,052.20</u>
Total					<u>\$4,069.80</u>

Example 2:

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

Home education rate	70%	X	\$1,272	=	\$890.40
Regular school rate (for the applicable grade)	30%	X	\$5,087	=	<u>\$1,526.10</u>
Total					<u>\$2,416.50</u>

REFERENCES

Home Education Policy 1.1.2

Home Education Regulation AR 126/1999

ALLOCATION FORMULA

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

ALLOCATION CRITERIA

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

DOCUMENTATION AND REPORTING REQUIREMENTS

1. Special needs funding is based upon **funded child** registration information as of September 30 and submitted to the Information Services Branch by October 5. **Funded children** must be coded using the exceptional student Code 30 for **children with mild or moderate disabilities/delays** or Code 80 for **funded children** who are gifted and talented. **School jurisdictions** must also include the grants program Code 500 on the electronic SIS registration file or Alberta Education Student Registration Form to receive this funding.

- Updated**
2. For **funded children** who were enrolled in the program on September 30 but were assessed as having a mild or moderate disability/delay or identified as gifted and talented after September 30, an “Add, Modify, Delete Form” (Form 05AE1.2c) must be completed and submitted to School Finance or the data may be submitted on-line using the Funding Event System (FES). The data should be submitted before April 30 to receive this funding.
 3. Recent assessment documentation to support each **funded child’s** designation and identification as a **child with a mild or moderate disability/delay** or a **funded child** who is gifted and talented must be kept on file by the **school jurisdiction**.
 - Revised** 4. An **Individualized Program Plan (IPP)** for each **child with a mild or moderate disability/delay** or a **funded child** who is gifted or talented is to be developed, implemented, regularly reviewed and kept on file by the **school jurisdiction**.

REFERENCES

Early Childhood Services Policy 1.1.3

Guide to Education: ECS – Grade 12

ALLOCATION FORMULA

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

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

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

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

i) **Centre-based programming**

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

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

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

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

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

Choose the program unit **funded child** with the highest combination of **centre-based programming** hours an/or **family-oriented ECS programming** sessions (formerly home visit) and calculate the ceiling for this program unit **funded child** as follows:

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

PLUS,

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

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

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

ALLOCATION CRITERIA

1. Program Unit Funding (PUF) may be paid to a **school jurisdiction** for each eligible **child with a severe disability/delay** for a maximum of three years.
2. The funding amount paid will be the lesser of the program unit ceiling, the approved budget total, and the actual cost.
3. To be eligible for funding, a **child with a severe disability/delay** must be at least 2 years 6 months of age and less than 6 years of age on September 1. **School jurisdictions** should plan the **funded child's** program so that the last year of PUF is the year prior to the **funded child's** entry into Grade 1.
4. **School jurisdictions** will use the categories and codes outlined in the definition of **students/ECS children with severe disabilities/delays** in the Glossary of Terms to determine a program unit **funded child's** eligibility, and to properly code the child for funding purposes.
5. A **funded child** receiving PUF is not eligible for ECS mild/moderate funding.

Revised

6. A **funded child** may be claimed by only one **ECS operator** at a time. The **school jurisdiction** claiming the **funded child** is responsible for ensuring the **funded child** is not claimed by another **ECS operator**.

7. Eligibility for PUF will be based on all of the following:

- Revised
- a) a diagnosis of a disability/delay or condition at the severe/profound level by qualified personnel (note: a diagnosis alone is not sufficient to qualify for funding);
 - b) written descriptions, results of educational assessments and/or anecdotal notes that indicate the **funded child's** current level of functioning in the ECS environment;
 - c) a current **Individualized Program Plan (IPP)** which addresses the **funded child's** diagnosed needs; and
 - d) the levels of support and services being provided to the **funded child**.

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

DOCUMENTATION AND REPORTING REQUIREMENTS

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

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

2. The following information pertaining to each **funded child** receiving PUF must be kept on file by **school jurisdictions** and made available to the Special Programs Branch upon request:
 - a) an **Individualized Program Plan (IPP)** must be developed, implemented and regularly revised for each program unit **funded child**;
 - b) formal assessment documentation to support the severity of each program unit **funded child's** special needs (a current assessment report must be included with the PUF application);
 - c) informal assessment documentation reflecting current performance levels;
 - d) plans and summaries of **family-oriented ECS programming** sessions (formerly home visits) conducted over the year;
 - e) current budget information.
3. An application for a **funded child** who is diagnosed or registered after January 3 will be accepted until May, using the process described in #1.
4. When a **funded child** leaves a program before the end date specified on the PUF application, please notify Alberta Education of the changes by submitting the PUF Application Adjustments Form (Form 05AE2.3b) to the School Finance Branch within 30 days of the child's departure. The original budget total and ceiling will then be adjusted.
5. When a **child with a severe disability/delay** moves from one **ECS operator** to another, a new PUF application based on the **IPP** must be submitted by the second operator prior to May 1 of the program year.
6. At the end of each school year, **school jurisdictions** must report actual expenditures for all program unit **funded children** using Form 05AE1.6, Statement of Actual Expenditure, as follows:
 - Complete one statement for all program unit **funded children** except those program unit **funded children** in a **Designated Special Education ECS program**.
 - Complete a statement for each approved **Designated Special Education ECS program**.The form(s) must be returned to the School Finance Branch by October 31.
7. If a program unit **funded child** has a medical condition/disability which has not changed significantly since the initial diagnosis and was previously approved by Alberta Education, current documentation outlining assessments, treatment and current level of functioning may be sufficient to ensure continuation of PUF. This information should be kept on file and available for review by Alberta Education.

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

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

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

8. **Clustering** (see definition in Glossary of Terms) should be the first option considered for PUF children especially for children with a **Severe Delay Involving Language** (Code 47). Whenever possible operators should cluster program unit **funded children** with similar needs who receive services in the same setting at the same time or who share resources (regardless of setting). The decision to cluster **funded children** into a program unit should be based on the educational needs of the program unit **funded children**.
9. A program unit **funded child's centre-based programming** hours and **family-oriented ECS programming** sessions (formerly home visits) must meet the child's needs. If a combined program of centre-based hours and **family-oriented ECS programming** sessions (formerly home visits) is provided, there must be a minimum of four family-oriented ECS programming sessions in order to be included in the ceiling calculation (see example of ceiling calculation). See definition of **Family-Oriented ECS Programming** in the Glossary of Terms. Also see definition of **Centre-Based ECS Programming** in the Glossary of Terms.
- Note: **family-oriented ECS programming** is not intended as the only form of programming a program unit **funded child** receives, but rather is intended to enhance the centre-based component of the child's education program as outlined in their **IPP**. (See definition of **Centre-Based ECS Programming**).
- For funding purposes, **family-oriented ECS programming** is claimed as sessions, where a session is defined as a minimum of 1.5 hours. A session involving more than one child and their **parent(s)** may be pro-rated based on the number of children and **parents** involved in the session and the length of session (minimum 45 minutes). Note: intervention provided by a member(s) of the child's learning team to the child, must involve the **parent/caregiver** in order to be counted as an eligible **family-oriented ECS programming** session.

New

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

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

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

Revised

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

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

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

For **school jurisdictions** that are providing a program for a **child with a severe disability/delay** in the regular ECS classroom: Base Instruction funding, Part 1, Section 1, is paid on behalf of all **funded children** in an **ECS program**. Base Instruction funding is available for a **child with a severe disability/delay** who is as

young as 2 years 6 months on September 1. This funding supports the day-to-day operating costs of the program, such as teacher salaries, rent, utilities, and supplies. Since these costs would be incurred whether or not a **child with a severe disability/delay** was in the program, they should not be included in the program unit expenditures. Teachers' salaries should not be included as program unit costs because the ECS Base Instruction funding supports these costs.

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

a) Instructional Costs

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

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

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

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

Revised

Some daycare fees may be claimed as an eligible PUF expense under Services Purchased. For **school jurisdictions** contracting placement in a Day Care and for Day Cares with approved ECS status the following apply:

- In circumstances where a program unit **funded child** is placed in a day care program because the program is the best place to implement the IPP for the program unit **funded child**, the fees only for the education component portion of the day may be claimed from PUF. The education component should reflect a typical education schedule.

- Costs for childcare are not eligible to be claimed under PUF.

Costs for special education administration may not be claimed in this category. These costs are covered by ECS Base Instruction funding. **School jurisdictions** must keep records and costs and services associated with special educational consultation.

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

d) Transportation

Revised

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

PUF may pay for any transportation costs for **children with severe disabilities/delays** not covered by these Transportation grants. To determine the amount of transportation costs that may be covered by PUF, all transportation costs must be listed on the PUF budget, then all transportation revenues (from the above transportation grants) must be deducted from the transportation costs. The following descriptions indicate the types of transportation costs which can be claimed and which transportation grants are available. Note: transportation claims must be submitted to the School Reporting Branch by November 30 and only program unit **funded children** who were enrolled by September 30 are eligible.

- i) Transportation to and from **school**: Transportation funding for these costs may be claimed under Section 1.21 by rural, urban and metro districts under Section 1.21 for a program unit **funded child** who requires special transportation; e.g. handi-bus, when, because of the severity of his or her disability/delay or because of the program unit **funded child's** age, the program unit **funded child** cannot ride regular, rural or urban transportation under Section 1.19, 1.20, 1.21, 1.22 for a program unit **funded child** who is transported by a regular bus. Transportation costs for **children with severe disabilities/delays** in excess of the funding paid under Section 2.4, 1.19, 1.20, 1.21 or 1.22 may be claimed as transportation costs under PUF;
- ii) **Family-Oriented ECS Programming Sessions** (formerly home visits): Transportation funding for these costs may be claimed under Section 1.21 by rural, urban and metro districts for each scheduled session made by a member of the child's learning team to the home of a program unit **funded child** who has **family-oriented ECS programming** sessions as part of his/her **ECS program**. Funding provided is based on the number of **family-oriented ECS programming** sessions up to a maximum of 36 sessions. Transportation costs in excess of the funding paid under Section 1.21 may be claimed as transportation costs under PUF;
- iii) Other – Field Trips: Transportation costs for field trips that are provided in addition to field trips for the regular ECS class or for a program unit **funded child** who, because of his/her disability, requires special transportation on a regularly scheduled field trip may be claimed under PUF; and

Revised

iv) In-Program: Transportation costs for this area may be claimed as transportation costs under PUF. In-program transportation is transportation of the program unit **funded child** from the **school**/centre program off-site to another program or service as part of the program unit **funded child's Individualized Program Plan (IPP)**.

e) Operation and Maintenance

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

f) Administration

Funding for administration is provided through the various funding rates and formulas used to determine ECS funding allocations. Costs for this category may not be claimed on the PUF budget.

g) Capital: Furniture and Equipment – these are child specific expenditures for specialized furniture and equipment, that are not available free or subsidized by another source, and are required to meet the special needs of a program unit **funded child**.

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

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

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

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

- v) Renovations to a building to be used for the benefit of all program unit **funded children** in the instructional area are not eligible for support under this section. **School jurisdictions** receive funding for renovations through the Infrastructure Maintenance Program (IMP) administered by Alberta Infrastructure.
- vi) Administrative capital purchases cannot be claimed under this category.

14. Designated Special Education ECS programs

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

- a) Approval by Special Programs Branch is required to qualify for this status.
- b) **ECS operators** who qualify for this status may claim all education program costs except capital building costs.
- c) A budget based on the total education program costs must be submitted on the PUF application budget page for **Designated Special Education ECS programs**.
- d) Operation & Maintenance costs: This would include costs associated with the operation and maintenance of the **school** facility and would also include rent costs. PUF will cover costs in this category that exceed the funding provided by Alberta Infrastructure.
- e) Administration: Reasonable costs for administration of the **ECS program** may be claimed here. Costs in this area are typically in the 6% to 12% range. Costs in this category should not include any central office administration costs/charges covered by administration funding that is provided under the various funding rates and formulas used to determine ECS funding allocations.
- f) Capital costs must meet the specific needs of a program unit **funded child** or a group of program unit **funded children** to be eligible. An itemized list of capital must be included with the application if costs are claimed in this category.
- g) 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.
- h) **Designated Special Education ECS programs** must comply with all Allocation Criteria on Program Unit Funding outlined in Section 1.6 of this Manual. These programs must also comply with the principles contained in Alberta Education's *Kindergarten Statement Revised September 2000*.

- Revised** i) Applications for new programs must be submitted as a proposal to the Director of the Special Programs Branch by June 1, for approval. To be considered for this designated status, the program must have operated as an ECS operator for at least one year and must have a minimum enrolment of at least 10 program unit **funded children**. Newly designated programs will be subject to program review within the first year. The proposal should contain the following information:
- a rationale for applying for status as a **Designated Special Education ECS program** including the potential benefits to **children with severe special needs** and their families. The rationale should also explain why the program could not operate as a regular **ECS program** and should highlight how receiving the designated status will resolve those issues;
 - an overview of the proposed program including population served, program format, service delivery model, support services provided, opportunities for inclusion, transition to the community **school** and a brief summary of the role descriptions of program staff;
 - a proposed budget completed using Form 05AE2.3a. This budget should outline all estimated expenditures and projected revenues; and
- New** j) **Designated Special Education ECS programs** must maintain a minimum enrolment of at least 10 program unit **funded children** to retain their designated status.
- New** k) Existing **Designated Special Education ECS programs** must apply to the Special Programs Branch, in writing by June 1, of the intent to expand to another site or location.
- l) The status of approved **Designated Special Education ECS programs** may be reviewed and withdrawn at any time by Alberta Education.

ADDITIONAL INFORMATION

1. A child with a severe disability/delay who:

- a) is at least 5 years 6 months but less than 6 years of age on September 1 of the school year in which s/he is counted; and
- b) is eligible to enter Grade 1 under the **school** entrance age policy of a **school jurisdiction**; and
- c) has not spent 3 years in an **ECS program**,

may be eligible for PUF if, in the opinion of the **school jurisdiction** and the **parent**, an **ECS program** is the most appropriate placement for the program unit **funded child**.

2. The calculation of the ceiling amount for a program unit with one **funded child** in it using examples of **centre-based ECS programming**, and a program based on a combination of **centre-based ECS programming** hours and **family-oriented ECS programming** sessions (formerly home visits) is determined as follows:

Calculation of the ceiling for <u>centre-based ECS programming</u> of 500 hours	Calculation of the ceiling for a <u>combined program</u> based on 500 centre-based ECS programming hours and 10 family-oriented ECS programming sessions.
$\frac{500 \text{ hrs}}{800 \text{ hrs}} \times \$22,141$ $= \$13,838$	$\left\{ \frac{500}{800} + \frac{10}{36} \right\} \times \$22,141$ $= \$19,988$

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

3. The maximum program unit rates should be viewed as ceilings only. Provincial averages indicate the costs of most programs average about \$14,000 per program unit funded child. Careful stewardship of funds by **school jurisdictions** is integral to the PUF program.
4. For a program unit with more than one **funded child**, the ceiling is calculated as follows:
- Choose the program unit **funded child** with the highest combination of **centre-based ECS programming** hours and **family-oriented ECS programming** sessions (formerly home visits).
 - Calculate the ceiling for this program unit **funded child** as follows:

$$\left\{ \frac{\# \text{ hours}}{800} + \frac{\# \text{ sessions}}{36} \right\} \times \$22,141$$

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

$$+ \left\{ \frac{\# \text{ hours}}{800} + \frac{\# \text{ sessions}}{36} \right\} \times \$5,493$$

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

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

The ceiling is then calculated as follows:

$$\begin{array}{rcl}
 \left[\frac{500}{800} + \frac{10}{36} \right] \times \$22,141 & = & \$19,988 \\
 + \left[\frac{400}{800} \right] \times \$5,493 & = & \$2,747 \\
 + \left[\frac{600}{800} + \frac{4}{36} \right] \times \$5,493 & = & \$4,730 \\
 \hline
 = \text{Total ceiling for the unit} & & \$27,465
 \end{array}$$

5. Funding ceiling amounts will be adjusted when a **funded child's** program starts after September 30 or ends prior to May 25. Funding ceiling amounts will be adjusted when a **funded child** leaves the program earlier than planned. In these situations, the ceiling will be the lesser of:
 - a) A pro-rated ceiling amount of approximately \$2,214 per month for the number of months the program runs; or
 - b) The ceiling amount based on **centre-based ECS programming** and the number of **family-oriented ECS programming** sessions (formerly home visits) provided.

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

Ceiling calculation for a 4 month program in a 10 month program year	
Lesser of:	
a)	\$22,141 x 4/10 = \$8,856 or
b)	\$22,141 x (300/800 + 4/36) = \$10,763
Ceiling amount is \$8,856	

New 6. Family-Oriented ECS Programming Sessions: What Counts as an eligible session and what doesn't.

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

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

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

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

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

REFERENCES

Program Unit Funding: A Handbook for ECS Operators

ALLOCATION FORMULA

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

ALLOCATION CRITERIA

1. The relative weighting factor is applied to the Education Grant Rate to determine the Severe Disabilities rate.
2. Funding is provided to **school jurisdictions**, excluding **charter schools**, based on the established severe disabilities profile for the jurisdiction that includes historical data of the numbers of **students with a severe disability**, provincial patterns of overall student enrolment growth and projections for growth of the numbers of **students with a severe disability**.
3. **Charter schools** are funded on an eligible **student with a severe disability** basis,
Revised in accordance with the Conditions and Requirements in Section 3.3.

DOCUMENTATION AND REPORTING REQUIREMENTS

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

3. **Students with a severe disability** included in the profile must receive three or more of the levels of support identified in ADDITIONAL INFORMATION 5 (d);
4. **School jurisdictions** will use the severe disabilities categories and codes as outlined in the definition of **students with a severe disability** in the Glossary of Terms, the *Standards for Special Education, Amended June 2004* and the *Handbook for the Identification and Review of Students with Severe Disabilities* to determine a student's eligibility and to properly code the student for funding purposes.
5. **School jurisdictions** must report **students with a severe disability** as of September 30, and submit to the Information Services Branch by October 5.

ADDITIONAL INFORMATION

1. Students who are registered with one **school jurisdiction** on September 30 and who then move to another **school jurisdiction** after September 30, are not eligible for additional funding because the severe disabilities profiles include accommodation for student movement during the year. This would also apply to students who move from an **institution** (i.e., a hospital program, young offender centre, etc) or from out of province to a **school jurisdiction** after September 30.
2. A **school jurisdiction** that directs a **student with a severe disability** to another **school authority** is responsible for all educational program costs that are not covered by funding provided by Alberta Education to the **school authority** providing the student's program.
3. **Students with a severe disability** who transfer after September 30 from a **school jurisdiction** to a **funded accredited private school** including a **DSEPS**, are eligible for prorated funding based on the March 1 count. Alberta Education will provide the prorated funding directly to the **funded accredited private school**, including **DSEPS** if all funding requirements are met. **School jurisdictions** will not be required to transfer severe disabilities funding to the **funded accredited private school**.
4. **School jurisdictions** may request an audit of their severe disabilities profile if there are significant increases or decreases to the number of **students with a severe disability** by writing the Director, Special Programs Branch by November 1.
5. The audit will consider the eligibility and approval of severe disabilities funding based on a review of each student's file. Each file must contain all the following information:
 - a) assessment and diagnosis by qualified personnel (note: a diagnosis alone is not sufficient to qualify for funding);
 - b) documentation/assessments of the student's current level of functioning in the learning environment;

- c) a current **Individualized Program Plan (IPP)**;
 - d) identification of the types of support and services being provided to the student. Students claimed for severe disabilities funding must receive three or more of the following types of support:
 - Revised** i) a minimum 0.5 FTE one-to-one instruction/intervention/support (e.g., specialized teacher and/or teacher assistant time);
 - ii) specialized equipment or assistive technology;
 - iii) assistance with basic care (e.g., toileting, grooming, catheterization);
 - iv) frequent documented monitoring of medical and/or behaviour status; and
 - v) direct specialized services at cost to the system (e.g., behaviour specialist, orientation and mobility specialist).
6. For **students with a severe disability** in a **charter school**, who transfer after September 30 to a **funded accredited private school**, (or vice versa), severe disabilities funding must be transferred by the **charter school** to the **funded accredited private school**, (or vice versa), on a pro-rated basis, based on a 10 month program year.
- New**

REFERENCES

Standards for Special Education, Amended June 2004

Handbook for the Identification and Review of Students with Severe Disabilities

ALLOCATION FORMULA

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

ALLOCATION CRITERIA

1. The relative weighting factor is applied to the Education Grant Rate to determine the ESL Rate for Canadian-born ECS **funded children** and **funded students** (Code 303) and Foreign-born ECS **funded children** and **funded students** (Code 301).
2. A **school jurisdiction** with students who have insufficient fluency in English to achieve grade level expectations in English Language Arts and other subject areas may receive English as a Second Language (ESL) funding for eligible ESL **funded children** counted at 0.5 full-time equivalent and eligible ESL **funded students** in Grades 1 to 12.
3. Students eligible for ESL funding:
 - a) Come from homes in which the primary spoken Language is not English; and
 - b) Speak minimal English or are non-English speaking.
4. There are two enrolment counts taken for funding both Canadian born ESL students (Code 303) and Foreign-born ESL students (Code 301) - September 30 and March 1. The March 1 count provides funding for in-year growth in both Canadian born ESL enrolments and Foreign-born ESL enrolments. Each count will be used for funding 50 percent of the school year, except, if the March 1 count of ESL students is less than the September 30 count, then the September 30 count will be used for the entire school year.
5. Coding of an eligible ESL **funded child/student** must also be supported by an annual assessment of the student's language proficiency in English. This assessment documentation must be kept on file at the **school** and made available upon request.
6. After three years of instruction it is expected most students would have sufficient fluency in English to access regular programming, although some students may require additional time. Funding will be provided for a maximum of 5 years for each eligible ESL **funded child/student**.

- New
7. Because of the unique nature of ESL programming for Hutterite students in Colony Schools, some individual students may still require ESL program support beyond the five year maximum. In these cases, **school jurisdictions** may apply for additional years of ESL funding for individual students by applying to their Alberta Education Zone Director. The application must include ESL assessment information, a description of the ESL program provided, and plans for the ESL program to be provided to the student(s) in the next school year.
 8. **Funded students** enrolled in Home education, **blended programs**, **outreach programs** or **on-line programs** are not eligible for funding under this section.

DOCUMENTATION AND REPORTING REQUIREMENTS

1. September 30: Student registration information for ECS to Grade 12 as of September 30 of the current school year must be submitted to the Information Services Branch by October 5. This registration must include Canadian-born (Code 303), Foreign-born (Code 301) and unfunded (Code 302) ESL students. This coding of ESL students is required for **school jurisdictions** to receive funding.
2. March 1 (excluding unfunded (Code 302)): Student registration for ECS to Grade 12, ESL Canadian-born (Code 303) and Foreign-born (Code 301), as of March 1 must be submitted to the Information Services Branch by March 6.
3. **Francophone regional authorities** cannot claim both **Francisation** funding and ESL funding for the same child/student.
4. See also Section 1.25 for funding on Enhanced ESL and Support Services for Immigrant Students.

ALLOCATION FORMULA

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

ALLOCATION FORMULA

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

DOCUMENTATION AND REPORTING REQUIREMENTS

1. All **school jurisdictions** receiving FNMI Education Funding must report FNMI student achievement and high school completion rates in their Annual Education Results Report as specified in the *Guide to School Board Planning and Reporting*.
2. The following types of self-identified FNMI students/children who reside off a reserve are funded by Alberta Education and should be coded as follows:

Code 331 Aboriginal Learner – Status Indian/First Nations

Code 332 Aboriginal Learner – Non Status Indian/First Nations

Code 333 Aboriginal Learner – Métis

Code 334 Aboriginal Learner – Inuit

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

New Alberta Education will also fund self-identified FNMI students who live on a reserve, who are Non-Status, who attend an Alberta **school** off the reserve.

ADDITIONAL INFORMATION

1. FNMI student registration information is taken on September 30 of each school year and submitted to the Information Services Branch by October 5. The 2005-2006 school year is the second year of the Data Collection Initiative and involves the self-identification registration process being led by the Aboriginal Policies Sector, Alberta Education. For further information or if you have questions regarding the collection activity, please contact the Information Services Help desk at (780) 427-5318. For **school jurisdictions** who chose to use the Statistics Canada data, FNMI funding will be based on the statistical data for each year as outlined in the following table:

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

2. **First Nations students with Status who reside on a reserve** are funded by the Government of Canada (Code 330) and do not qualify for funding under this section.

REFERENCES

Policy, Regulations and Forms Manual

First Nations, Métis and Inuit Education Program Guide

The First Nations, Métis and Inuit Education Policy Framework

Guide to School Board Planning and Results Reporting

ALLOCATION FORMULA

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

ALLOCATION FORMULA

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

SOCIO-ECONOMIC STATUS INCIDENCE RATES

Updated

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

SOCIO-ECONOMIC STATUS INCIDENCE RATES

School Jurisdictions	SES Incidence Rates rounded to 3 decimals (as used in SAFRS/original Profiles)
Lloydminster Public School Division	0.200
Lloydminster Roman Catholic Separate School Division	0.200
Medicine Hat Catholic separate Regional Division No. 20	0.215
Medicine Hat School District No. 76	0.245
Moberly Hall School Society	0.207
Mother Earth's Children's Charter School Society	0.188
New Horizons Charter School Society	0.253
Northern Gateway Regional Division No. 10	0.214
Northern Lights School Division No. 69	0.212
Northland School Division No. 61	0.355
Northwest Francophone Education Region No. 1	0.225
Palliser Regional Division No. 26	0.205
Parkland School Division No. 70	0.188
Peace River School Division No. 10	0.209
Peace Wapiti Regional Division No. 33	0.185
Pembina Hills Regional Division No. 7	0.199
Prairie Land Regional Division No. 25	0.153
Prairie Rose Regional Division No. 8	0.175
Red Deer Catholic Regional Division No. 39	0.224
Red Deer School District No. 104	0.260
Rocky View School Division No. 41	0.158
St. Albert Protestant Separate School District No. 6	0.151
St. Paul Education Regional Division No. 1	0.246
St. Thomas Aquinas Roman Catholic Separate Regional Division No. 38	0.215
Sturgeon School Division No. 24	0.173
Suzuki Charter School Society	0.253
Westmount Charter School Society	0.216
Westwind School Division No. 74	0.178
Wetaskiwin Regional Division No. 11	0.234
Wild Rose School Division No. 66	0.196
Wolf Creek School Division No. 72	0.193

DOCUMENTATION AND REPORTING REQUIREMENTS

1. Student registration information for **funded children** and **funded students** as of September 30 of the current school year that is submitted to the Information Services Branch by October 5.
2. **School jurisdictions** are not required to apply for funding under this section. School Finance will determine the funding allocation of **school jurisdictions**.

ALLOCATION FORMULA

$$\text{Small School by Necessity} = \left\{ a) + b) \right\} \times \left\{ \frac{\text{\# of small schools by necessity}}{\text{\# of all small schools}} \right\}$$

Updated

+ Closed Schools Calculation (where applicable)

a) and b) are calculated using the formulas below. A small school by necessity is described in the ALLOCATION CRITERIA. * For the purpose of this section, 'FTE funded enrolment' is the **funded children** counted at 0.5 full-time equivalent and the number of **funded students** that is equal to the **funded student** head count.

A small school is a **school** that receives funding under a) or b) or both:

a) Base Allocation: the sum of i) and ii) for **schools** in each category,

i) For each **school** with a 'FTE funded enrolment'* of 150 or less;

$$\text{Base Allocation} = \$78,030$$

ii) For each **school** with a 'FTE funded enrolment'* of 151 or more but less than a 'FTE funded enrolment*' of 226;

$$\text{Base Allocation} = \$78,030 - \left[\frac{\$78,030}{76} \times \left\{ \text{FTE funded enrolment}^* - 150 \right\} \right]$$

AND,

b) Variable Allocation: the sum of i) and ii) for **schools** in each category:

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

$$\text{Variable Allocation} = \left\{ \frac{\text{Unadjusted FTE funded enrolment}^*}{\text{rate}} \times \text{Grade Factor} \times \text{FTE funded enrolment}^* \right\}$$

Where in the above formula;

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

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

AND, the following table,

TABLE 1

A **school** which does not fit clearly into one of the categories in the Table should be included under the category that is a 'Best Fit', see ALLOCATION CRITERIA #4.

School Type Less Than Peak Enrolment	School Rate	Peak Enrolment	# of grades in the Grade Configuration
K to 3	\$520	40	3.5
K to 6	\$1,457	80	6.5
K to 9	\$1,665	80	9.5
K to 12	\$2,601	80	12.5

PLUS,

- ii) For each **school** with a greater 'FTE funded enrolment' * than the Peak Enrolment (see Table 2 below):

$$\text{Variable Allocation} = \left\{ \frac{\text{Unadjusted FTE funded enrolment*}}{\text{Rate}} \times \text{Grade Factor} \times \text{FTE funded enrolment*} \right\}$$

Where in the above formula,

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

AND,

$$\text{Smoothing Factor} = \frac{\text{School Rate}}{\left\{ \text{FTE funded enrolment* limit} - \text{Peak Enrolment} \right\}}$$

$$\text{Grade Factor} = \left\{ \frac{\text{\#of grades with FTE funded enrolment*}}{\text{\# of grades in the grade configuration}} \right\}$$

TABLE 2

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', see ALLOCATION CRITERIA #4.

School Type >= Peak Enrolment	School Rate	Peak Enrolment	Small School *FTE funded enrolment limits	# of grades in the Grade Configuration
K to 3	\$520	40	80	3.5
K to 6	\$1,457	80	150	6.5
K to 9	\$1,665	80	220	9.5
K to 12	\$2,601	80	290	12.5

**Smoothing factor: school rate/FTE funded enrolment*limit minus Peak Enrolment

ALLOCATION CRITERIA

1. Small Schools by Necessity funding is provided to a **school jurisdiction** in which the 'distance between **schools**' is such that the transportation of students from one **school** to another **school** of the same **school jurisdiction** is not practical. 'Distance between **schools**' is defined as 25 kilometres by **highway** in a **rural district** or 6 kilometres by highway in an **urban district**. If there are no **schools** within the 'distance between **schools**' that can accommodate the additional students because of capacity or grade level considerations, a **school** will be considered necessary.
2. Capacity of a **school** will be determined in consultation with Alberta Infrastructure. A **school** with a utilization of 85% is fully utilized.
3. Examples of 'Best Fit' relative to **school** categories in Tables 1 and 2 are a **school** with enrolment in Grades 7 to 9 or a **school** with enrolment in K to 8, the 'Best Fit' category is K to 9.
4. Students enrolled in Home education programs, **charter schools**, and Hutterite Colony Schools are not counted for funding under this section.
5. 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%

6. **Schools** that closed before the 2004-2005 school year are not eligible to be included for funding under this section.

DOCUMENTATION AND REPORTING REQUIREMENTS

1. Student registration information for **funded children** and **funded students** as of September 30 of the current school year that is submitted to the Information Services Branch by October 5.
2. **School jurisdictions** are not required to apply for funding under this section. School Finance will determine the funding entitlement of **school jurisdictions**.
3. **Schools** of choice will not be considered in Small Schools by Necessity funding. The following list provides examples of the excluded categories of these **schools**:

Revised

- | | |
|--|-----------------------------|
| ▪ Outreach Schools | ▪ Hockey/Dance Schools |
| ▪ Home Education Schools | ▪ Institutional Schools |
| ▪ Religious Education Schools | ▪ On-Line Schools |
| ▪ Hutterite Colony Schools | ▪ Language/Cultural Schools |
| ▪ Schools that mainly serve students/children with severe special needs | ▪ French Immersion Schools |

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

ALLOCATION FORMULA

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

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

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

OR,

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

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

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

ALLOCATION CRITERIA

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

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

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

DOCUMENTATION AND REPORTING REQUIREMENTS

1. Student registration information for **funded children** and **funded students** as of September 30 of the current school year that is submitted to the Information Services Branch by October 5.
2. **School jurisdictions** are not required to apply for funding under this section. School Finance will determine the funding allocation of **school jurisdictions**.

ADDITIONAL INFORMATION

1. Intra-jurisdiction distance recognizes the differential costs of providing service in geographically widespread areas and the increased costs associated with operating **schools** and managing student populations in more than one community and over significant distance.

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**.

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

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.

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

ALLOCATION CRITERIA

- Enrolment growth funding is based on the percentage increase in funded enrolment (in excess of the threshold level) from the prior school year and is determined by using the number of **funded children** counted at 0.5 full-time equivalent and the number of **funded students**.
- School jurisdictions** experiencing enrolment growth at the jurisdiction level of greater than 4 percent from year-to-year are eligible for **school jurisdiction** level funding.
- School jurisdictions** with individual **schools** experiencing enrolment growth of greater than 7 percent from year-to-year are eligible for **school** level funding. For determining enrolment growth in Hutterite Colony schools, the sum of the enrolments of all of the Hutterite Colony schools located in a **school jurisdiction** will be treated as one **school** enrolment (e.g. if there are 10 Hutterite Colony schools in a **school jurisdiction** these 10 **schools** will be considered one **school**).

Updated

4. Enrolment growth funding is not provided for in-year enrolment growth at either the **school jurisdiction** level or at the **school** level. In-year enrolment growth in grades 10 to 12 is provided through CEU funding.
5. Enrolment growth funding is provided for a new **school** that begins operating on or before the September 30 **count date**. If circumstances prohibit the **school** from beginning operation on or before September 30, 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.
6. Enrolment growth funding is provided for enrolment growth resulting from an expanded program that is implemented on or before the September 30th **count date**.
7. 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.
8. **Charter schools** will be treated as **school jurisdictions** and will qualify for enrolment growth funding only at the jurisdiction level.
9. 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.
10. Students enrolled in Home education, and **on-line programs** are not counted for **school jurisdiction** enrolment growth funding under this section.
11. Students enrolled in Home education, **Outreach programs** and **on-line programs** are not counted for **school** enrolment growth funding under this section.

DOCUMENTATION AND REPORTING REQUIREMENTS

1. Student registration information for **funded children** and **funded students** as of September 30 of the current **school** year and the immediate preceding year submitted to the Information Services Branch by October 5.
2. **School jurisdictions** are not required to apply for funding under this section. School Finance will determine the funding allocation for **school jurisdictions**.

ADDITIONAL INFORMATION

1. This funding recognizes the additional costs associated with increasing enrolments at the **school** and **school jurisdiction** levels.

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**.

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

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.

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

ALLOCATION CRITERIA

1. Enrolment decline funding is based on the percentage decrease in funded enrolment (in excess of the threshold level) from the prior school year and is determined by using the number of FTE **funded children** counted at 0.5 full-time equivalent and the number of **funded students**.
2. **School jurisdictions** experiencing enrolment decline from year-to-year at the jurisdiction level of greater than 1.5 percent are eligible for **school jurisdiction** level funding.
3. **School jurisdictions** with individual **schools** experiencing natural enrolment decline from year-to-year of greater than 4 percent are eligible for funding. These enrolment decreases will be evaluated annually for eligibility on a **school** by **school** basis by the Director of School Finance. For determining enrolment decline in Hutterite Colony schools the sum of the enrolments in all Hutterite Colony schools located in a **school jurisdiction** will be treated as one **school** enrolment (e.g. if there are 10 Hutterite Colony schools in a **school jurisdiction** these 10 **schools** will be considered one **school**).

4. 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**.
5. Enrolment decline funding is not provided for in-year enrolment decreases.
6. Enrolment decline funding is not provided in **school** closure situations.
7. 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.
8. Students enrolled in Home education, and **on-line programs**, are not counted for **school jurisdiction** enrolment decline funding under this section.
9. **Charter schools** will be treated as **school jurisdictions** and will qualify for Enrolment Decline funding only at the jurisdiction level.
10. 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.
11. Students enrolled in Home education, **Outreach programs**, and **on-line programs** are not counted for **school** enrolment decline funding under this section.

DOCUMENTATION AND REPORTING REQUIREMENTS

1. Student registration information for **funded children** and **funded students** as of September 30 of the current school year and the immediate preceding school year submitted to the Information Services Branch by October 5.
2. **School jurisdictions** are not required to apply for funding under this section. School Finance will determine the funding allocation of **school jurisdictions**.

ADDITIONAL INFORMATION

1. This funding recognizes that costs do not necessarily decline proportionate to the loss in revenue that results from enrolment decreases.

ALLOCATION FORMULA

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

Small Board

Administration = a) \$416,160 for a **school jurisdiction** (excluding **charter schools**) with FTE funded enrolment of 2000 students or less

OR,

b) For a **school jurisdiction** (excluding **charter schools**) with a FTE funded enrolment between 2000 and 3000 students:

$$\$416,160 - \left[\$416.16 \times \left\{ \begin{array}{c} \text{FTE Funded} \\ \text{enrolment} \end{array} - 2000 \right\} \right]$$

OR,

c) \$57,222 for a **charter school**.

School jurisdictions (excluding **charter schools**) with FTE funded enrolments of 3000 or more students do not qualify for this funding.

ALLOCATION CRITERIA

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

DOCUMENTATION AND REPORTING REQUIREMENTS

1. Student registration information for **funded children** and **funded students** as of September 30 of the current school year that is submitted to the Information Services Branch by October 5.
2. **School jurisdictions** are not required to apply for funding under this section. School Finance will determine the funding allocation for **school jurisdictions**.
3. Students enrolled in Home education are not counted for funding under this section.

ALLOCATION FORMULA

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

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

ALLOCATION CRITERIA

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

DOCUMENTATION AND REPORTING REQUIREMENTS

1. Student registration information for **funded children** and **funded students** as of September 30 of the current school year that is submitted to the Information Services Branch by October 5.
2. **School jurisdictions** are not required to apply for funding under this section. School Finance will determine the funding allocation of **school jurisdictions**.

ADDITIONAL INFORMATION

1. Northern allowance funding recognizes the added cost of operating **schools**, to obtain services and to move goods to **schools** located in the northern area of Alberta.

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

ALLOCATION FORMULA

Updated

$$\text{RCPA Allocation} = \left\{ 20\% \times \left\{ \begin{array}{l} \text{Total Eligible Funding to a} \\ \text{school jurisdiction,} \\ \text{excludes Provincial} \\ \text{Priority, Boarding,} \\ \text{Transportation funding,} \\ \text{and Plant Operations and} \\ \text{Maintenance funding.} \end{array} \right\} + 47\% \times \left\{ \begin{array}{l} \text{Transportation} \\ \text{and Boarding} \\ \text{funding} \end{array} \right\} \right\} \times \text{RCPA Adjustment} \\ \text{Factor (Jurisdiction RCPA} \\ \text{Index} - 1.0)$$

ALLOCATION CRITERIA

Updated

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

DOCUMENTATION AND REPORTING REQUIREMENTS

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

ADDITIONAL INFORMATION

1. The RCPA funding recognizes the local cost difference of goods and services among **school jurisdictions**.

2. The RCPA Adjustment Factor is determined by taking the Jurisdiction RCPA Index number as indicated in the table below and subtracting 1.0:

JURISDICTION NAME	JURISDICTION RCPA INDEX	JURISDICTION NAME	JURISDICTION RCPA INDEX
Almadina School Society	1.075	Holy Family CRD No. 37	1.032
Aspen View Regional Div No. 19	1.028	Holy Spirit Roman CSRD No. 4	1.001
Aurora School Ltd.	1.024	Horizon Sch Div No. 67	1.001
Battle River Reg Div No. 31	1.011	Lakeland RCSSD No. 150	1.000
Black Gold Reg Div No. 18	1.019	Lethbridge Sch Dist No. 51	1.000
Boyle Street Education Centre	1.024	Living Waters CRD No. 42	1.031
Buffalo Trail Public Div No.28	1.005	Livingstone Range Sch Div 68	1.008
Calgary Arts Academy Society	1.075	Lloydminster Pub Sch Div	1.026
Calgary Girls School Society	1.075	Lloydminster RCSSD	1.026
Calgary RCSSD No. 1	1.075	Medicine Hat CSRD No. 20	1.000
Calgary School District No. 19	1.075	Medicine Hat Sch Dist No.76	1.000
Calgary Science School Society	1.075	Moberly Hall School Society	1.118
Canadian Rockies Reg Div No.12	1.230	Mother Earth's Children's Charter School Society	1.024
CAPE-Centre for Academic & Personal Excellence Institute	1.000	New Horizons Charter School Society	1.024
Chinook's Edge Sch Div No. 73	1.000	Northern Gateway Reg Div No. 10	1.003
Christ the Redeemer CSRD No. 3	1.032	Northern Lights Sch Div No. 69	1.012
Clearview Sch Div No. 71	1.000	Northland School Div No. 61	1.050
E. Central Alberta CSSRD No. 16	1.000	North West Francophone No. 1	1.033
East Central Francophone No. 3	1.000	Palliser Regional Div No. 26	1.004
Edmonton CSS District No. 7	1.024	Parkland School Div No. 70	1.022
Edmonton School District No. 7	1.024	Peace River School Div No. 10	1.030
Elk Island CSRD No. 41	1.021	Peace Wapiti School Div No. 76	1.027
Elk Island Pub Schs Reg Div No. 14	1.022	Pembina Hills Reg Div No. 7	1.000
Evergreen CSRD No. 2	1.021	Prairie Land Reg Div No. 25	1.001
Foothills School Div No. 38	1.022	Prairie Rose School Div No. 8	1.000
Fort McMurray RCSSD No. 32	1.118	Red Deer CRD No. 39	1.000
Fort McMurray Sch Dist No. 2833	1.118	Red Deer School Dist No. 104	1.000
Fort Vermilion Sch Div No. 52	1.034	Rocky View School Div No. 41	1.070
FFCA Charter School Society	1.075	St. Albert PSSD No. 6	1.024
Golden Hills School Div No. 75	1.036	St. Paul Education RD No. 1	1.000
Grande Prairie RCSSD No. 28	1.027	St. Thomas Aquinas RCSR No. 38	1.012
Grande Prairie Sch Dist No. 2357	1.027	Sturgeon School Div No. 24	1.021
Grande Yellowhead Reg Div No. 35	1.051	Suzuki Charter School Society	1.024
Grasslands Regional Div No. 6	1.022	Westmount Charter School Soc.	1.075
Greater North Central Franc. No. 2	1.029	Westwind SD No.74	1.001
Greater Southern Public Franc. No. 4	1.054	Wetaskiwin Regional Div No. 11	1.011
Greater South Catholic Franc. No. 4	1.081	Wild Rose School Div No. 66	1.000
Greater St. Albert CRD No. 29	1.023	Wolf Creek SD No. 72	1.000
High Prairie School Div No. 48	1.049		

ALLOCATION FORMULA

$$\text{Boarding Allocation} = \text{Number of funded students eligible for Boarding} \times \text{Funding Rate}$$

ALLOCATION CRITERIA

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

DOCUMENTATION AND REPORTING REQUIREMENTS

1. Payment is made on the basis of the electronic form, "Special Transportation and Boarding" submitted to School Reporting Branch by November 30.
2. The **count date** is September 30.

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) **Block Funding Support**

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

Total Block Funding 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:

$$\text{Inter-School Support} = \text{Daily Kms of Inter-School Transportation for the bus} \times \text{Number of Days of Inter-School Transportation in the school year for the bus} \times \text{Support Rate}$$

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

c) **Cooperative Transportation**

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

$$\text{Number of eligible passengers/eligible transported ECS children who are non-resident transported under agreement} \times 50\% \text{ of the transporting board's density rate}$$

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

Refer to Section 1.21, Special Transportation

ALLOCATION CRITERIA

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

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

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

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

2. **Block 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 kilometres or more from the **school** attended, and where there is not a **transportation agreement** or an **education services agreement** between the **resident board** and the **board** providing transportation, the **board** providing transportation service may claim only the **density** support for that student.

- b) If a **board** extends its transportation service outside its jurisdiction boundaries to provide service to a non-resident student not covered by a **transportation agreement** or an **education services agreement** between the **resident board** and the **board** providing transportation, the **board** providing transportation service is not eligible for transportation funding for that student.
- c) If a **resident student** of a **board** is transported by the **board** to a **school** of the **parent's** choice outside the attendance area or transportation service area (as defined in the *Student Transportation Regulation*) of the **designated school** for the student, only **density** support and **distance** support to the nearest **school** may be claimed for that student if he or she is an **eligible passenger**. Where a **board** has adopted over-lapping **school** attendance or transportation service areas, **density** support and **distance** support to the **school** nearest the student's residence may be claimed.
- d) In the case of a **school jurisdiction** which is providing transportation in only a portion of its area, for those **eligible passengers** residing in the jurisdiction but beyond the transportation service area and are transported through co-operative bussing arrangements with other **school authorities**, area and **density** for the **school jurisdiction** shall be calculated on the basis of the area directly served by the **school jurisdiction** and the **eligible passengers** residing in that area.
- e) If a **board** is providing transportation services under an agreement with another **board** and the two **boards** are not sharing a co-terminus area, the area of the **board** receiving transportation services may be added to the transporting **board's** area for determining the **density** rating for the transporting **board**.
- f) Block funding under this section is available only to **boards** operating student transportation systems. A **board** accessing transportation services for its **resident students** through **educational services agreements** or **transportation agreements** is not eligible for block funding under this section.
- g) Notwithstanding subsection (f), a **board** transporting an **eligible passenger** of another **board** under a **transportation agreement** to the **designated school** of that **resident board**, who resides outside the transportation service area of the resident **board** and accesses the bus route of the **board**, may claim the **density** and the **distance** support from the **designated school** to the point where the student accesses the bus route for that **school**. The **resident board** may claim only the **distance** support from the residence of the student to the point where the student accesses the bus route for the **designated school**, at the distance rate received by the transporting **board**.
- h) **Eligible passengers** with severe disabilities who ride on a regular **school bus** route will be claimed under this section using the density and distance formula and are not eligible for funding under Section 1.21, Special Transportation.

Revised

Revised i) Special routes designated only for the transportation of those **students and children with a disability/delay** who, because of the severity of their disability/delay, are unable to ride on a regular **school bus** route may be claimed under this section using the **density** and **distance** formula or under Section 1.21, Special Transportation. (NOTE: all students on a special route must be claimed under the same section.)

j) Students in a wheelchair who ride a **school bus** will be funded at 8 times the regular rate.

3. ECS Transportation:

a) A **school jurisdiction** that claims ECS Regular Transportation funding must transport, or make arrangements for the transport of **funded children** attending **ECS programs** at a service level that is consistent with the transportation of students under Section 51 (2) of the *School Act*.

b) A **school jurisdiction** providing transportation to and from an **ECS program** may charge the **parent** of a **child** a fee for the transportation service. The total amount of fees charged to ECS **parents** for transportation services shall not exceed the total cost of the provision of ECS transportation services less the ECS transportation funding received from Alberta Education.

c) Each **eligible transported ECS child** transported will be counted as 1.0 weighted passenger in determining block funding support.

d) A **school jurisdiction** may claim **eligible transported ECS children** it transports to programs operated by another **board**, a **private school**, or a **private ECS operator** as **eligible passengers** if the **board** has an agreement with the other **board**, **private school**, or **private ECS operator**.

4. Inter-school Transportation:

a) Inter-school transportation for students whose courses of study require a special **school** facility or equipment not available in the **school** they attend, may be claimed for support provided that:

- the course of study is prescribed or approved by the **Minister** under the *School Act*, Section 39;
- the course of study requires a special **school** facility or equipment not available at the **school** of daily attendance for those students; and
- the course of study requires the use of the special **school** facility or equipment for at least 18 consecutive weeks.

b) Work Experience programs, recreational programs, and intermittent bussing to such activities as swimming programs are not eligible for inter-school transportation support.

5. Funding shall not be paid under this section for a **funded student** or a **funded child** who is counted under the Special Transportation funding (Section 1.21).
6. Transportation support shall be paid from the student's residence to the **school** in the attendance area or transportation service area in which the student resides unless the student is directed by the **board** to attend another **school** for the following:
 - **Alternative French language programs** (including French immersion and bilingual programs) and **other language immersion programs**;
 - Integrated Occupational courses (IO);
 - Special Education programs to meet the needs of **students with severe disabilities**;
 - Special Education programs to meet the need of students with mild or moderate disabilities when **board** criteria have been met;
 - high school CTS programs offered to an advanced level in a specialized classroom facility where the course curriculum requires the instructor to have the technical trade qualification (Courses include Mechanics, Fabrication Studies, Cosmetology and Construction Technology).
7. Students transported by a **board** to an **on-line program** or an **outreach program** accessing 50 percent or more of their educational program at a **school** of the **board** or to a **blended program** at 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 School Reporting 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*.

New Note that the 2005/2006 "RURAL CLAIM" will now include the Rural Special Transportation section in the claim form; please refer to Section 1.21 Special Transportation for Rural Special Transportation Allocation Criteria and funding rates.

2. Transportation support payments for each new school year will be paid at 100% of the previous year's funded monthly amount until review of the new funding application has been completed. If the new funding application has not been received on December 31 the January payment will be reduced to 75% of the previous year funded monthly amount retroactive to September 1 and continued until the new funding application is received and reviewed.
3. The **count date** for Rural Transportation funding is September 30. Special consideration for the **count date** may be given to **school jurisdictions** experiencing exceptional growth in transportation needs.

4. The **effective transportation area** of a **school jurisdiction** for purposes of calculating **density** support is the **effective transportation area** of the **school jurisdiction** as of September 30 in a given year.
- Revised 5. **School jurisdictions** are required to retain the following information on file for a minimum of seven years and make it available for review by Alberta Education upon request. Items a), b), c), and d) should be kept in an electronic file and made available to Alberta Education either electronically or on a computer disc.
- a) electronic geographic roadway maps of overall attendance areas and transportation service areas;
 - b) location of each student's residence (street addresses in towns, villages and hamlets, and where available in rural areas, and legal land descriptions in all other rural areas);
 - c) maps of individual bus routes;
 - d) a list of names of **eligible transported ECS children** transported by bus and the names and grades of **eligible passengers**;
 - e) records of **route distance** verified by an official(s) of the **school jurisdiction**;
 - f) copies of **educational services agreements**;
 - g) copies of **transportation agreements** with **school boards, private schools, charter schools** and **private ECS operators**;
 - h) copies of current vehicle inspection certificates issued under the *Safety Traffic Act*; and
 - i) Copies of contracts with:
 - (i) operators of contracted busses for regular transportation;
 - (ii) **parents** providing transportation indicating the amount to be paid; and
 - (iii) agents providing special transportation for **students with disabilities**.

ADDITIONAL INFORMATION

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

ALLOCATION FORMULA

1. Urban District transportation:

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

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

2. Francophone Authorities within an Urban Area:

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

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

New 3. Inter-School Transportation Support:

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

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

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

ALLOCATION CRITERIA

1. A **school jurisdiction** that is an **urban district** or **division** may receive urban transportation funding for each **eligible passenger** and each **eligible transported ECS child**.
2. For an **eligible passenger** or **eligible transported ECS child** of a city, town, village or hamlet with a population of:
 - 10,000 or fewer, refer to Section 1.19;
 - between 10,000 and 19,999, the rate applicable is the lowest density funding rate provided to rural **school jurisdictions**;
 - between 20,000 and 29,999, the rate applicable is the mid-point between the above two rates (i.e. the lowest rural density funding rate and the urban transportation rate);
 - 30,000 or greater, the rate applicable is the urban transportation rate;
3. An **urban district** may receive funding for a student who is not a **resident student** of the **board** that accesses the **board's** transportation system in accordance with the *Student Transportation Regulation*, Section 4, at a point that is 2.4 kilometres or more from the **school** in which the student could be enrolled.
4. If an **urban district** extends its transportation service outside its jurisdiction boundaries to provide service to a non-resident student not covered by a **transportation agreement** or an **educational services agreement** between the **resident board** and the **board** providing transportation, the **board** providing transportation service is not eligible for transportation funding for that student.
5. An **urban district** that claims ECS regular transportation funding must transport or make arrangements for the transportation of **eligible transported ECS children** at a service level that is consistent with the transportation of students under Section 51(1) of the *School Act*.
6. An **urban district** providing transportation to and from an **ECS program** may charge the **parent** of a **funded child** a fee for the transportation service. The total amount of the transportation fee charged to **parents** shall not exceed the total costs of the provision of ECS transportation services less the ECS transportation funding the **school board** receives from Alberta Education.
7. An **eligible passenger** or an **eligible transported ECS child** can only be counted once under this section.
8. Funding is not provided for transporting students or ECS children between **schools**.
9. Where a **board** has adopted over-lapping **school** attendance or transportation service areas, eligibility for funding under this section is determined by the **distance** to the **school** nearest the student's residence.

10. If a **resident student** of an **urban district** is enrolled in a **school** of the **parent's** choice outside the attendance area or transportation service area (as defined in the *Student Transportation Regulation*) in which the student resides, eligibility for transportation support is determined by the distance to the **school** nearest the student's residence.
11. If a **board** of an **urban district** or **division** transports students residing less than 2.4 km from the **school** within the attendance area or transportation service area (as defined in the *Student Transportation Regulation*) in which the students reside, to a **school** other than the **school** within the attendance area or transportation service area in which the students reside because the 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 with the attendance area or transportation service area and enrolled in that **school** shall be deducted from the number of **eligible passengers** claimed for funding under this section.
12. Where the **board** of an **urban district** has a rural area under its jurisdiction and is providing transportation services in that area, the **school jurisdiction** may receive funding under the Rural Transportation formula for each **eligible passenger** and each **eligible transported ECS child** residing in the rural area. A **school jurisdiction** claiming both urban and rural transportation must have received prior approval from the **Minister**. Requests for approval should be submitted to the School Reporting Branch.
13. To recognize the dispersion of students for a Francophone authority within an **urban district** a weighted factor of 3.5 will be used for Francophone **eligible passengers** (Grades 1-12) and Francophone **eligible transported ECS children**.
14. **Eligible passengers** with severe disabilities who ride on a regular **school bus** route will be claimed under this section using the urban transportation rate and are not eligible for funding under Section 1.21, Special Transportation.

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

15. Eligible **distance** is determined to be the **distance** from the student's residence to the nearest **school** in the attendance area or transportation service area in which the student resides unless the student is directed by the **board** to attend another **school** for any of the following reasons:
 - **Alternative French Language Programs** (includes French Immersion and bilingual programs) and **Other Language Immersion Programs**;
 - Integrated Occupational courses (IO);
 - Special Education programs to meet the needs of students with severe disabilities;

- Special Education programs to meet the needs of students with mild or moderate disabilities, when **board** criteria have been met;
- High school CTS programs offered to an advanced level in a specialized classroom facility where the course curriculum requires the instructor to have the technical trade qualification (courses include Mechanics, Fabrication Studies, Cosmetology and Construction Technology).

16. Students transported by a **board** to an **on-line program** or an **outreach program** accessing 50 percent or more of their educational program at a **school** of the **board** or to a **blended program** at a **school** of the **board** may be claimed as **eligible passengers** under Urban Transportation.

New 17. Inter-school Transportation

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

DOCUMENTATION AND REPORTING REQUIREMENTS

- Revised** 1. **Urban districts** are required to submit electronically an “URBAN CLAIM” to the School Reporting 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.

New Note that the 2005/2006 “URBAN CLAIM” will now include the Urban Special Transportation section on the claim form; please refer to Section 1.21 Special Transportation for Urban Special Transportation Allocation Criteria and funding rates.

2. Transportation support payments for each new school year will be paid at 100% of the previous year’s funded monthly amount until review of the new funding application has been completed. If the new funding application has not been received on December 31, the January payment will be reduced to 75% of the previous year funded monthly amount retroactive to September 1, and continued until the new funding application is received and reviewed.

3. The **count date** for Urban Transportation funding is September 30. Special consideration for the **count date** may be given to **school jurisdictions** experiencing exceptional growth in transportation needs.
4. Urban transportation funding is calculated by multiplying the number of **eligible passengers** and **eligible transported ECS children** by the urban transportation rate.
5. The funding an urban jurisdiction receives for rural students will be calculated using the Rural Transportation formula. These students cannot be included as **eligible passengers** under the Urban Transportation formula.
6. **Urban districts** are required to retain the following information on file for a minimum of seven years and make it available for review by Alberta Education upon request. Items a), b), c), and d) should be kept in an electronic file and made available to Alberta Education either electronically or on a computer disc:
 - a) electronic geographic roadway maps of overall attendance areas and transportation service areas;
 - b) location of each student's residence (street addresses in town, villages and hamlets);
 - c) maps of individual bus routes;
 - d) a list of names of **eligible transported ECS children** transported by bus and the names and grades of **eligible passengers**;
 - e) records of **route distance** verified by an official(s) of the **school jurisdiction**;
 - f) copies of **education service agreements**;
 - g) copies of **transportation agreements** with **school boards, private schools, charter schools** and **private ECS operators**;
 - h) copies of current vehicle inspection certificates issued under the *Highway Traffic Act*; and
 - i) copies of contracts with:
 - (i) operators of contracted **school busses** for regular transportation;
 - (ii) **parents** providing transportation showing amounts paid.

ADDITIONAL INFORMATION

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

ALLOCATION FORMULA

1. a) Special Transportation:

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

b) Weekend Transportation

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

Revised c) Family-Oriented ECS Programming Transportation

$$\begin{aligned} \text{Family-oriented ECS programming Transportation Allocation} &= \begin{array}{l} \text{Number of scheduled} \\ \mathbf{\text{family-oriented ECS programming}} \text{ sessions} \\ \text{(minimum 4 and maximum 36)} \end{array} \times \begin{array}{l} \text{Rate per Round Trip} \end{array} \end{aligned}$$

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

Funding is provided to **school jurisdictions** for up to 100 percent of approved costs for the purchase of a wheelchair lift or ramp to be installed on a new or used bus if prior written approval is given by the Director, School Reporting Branch. Applications should be submitted to the School Reporting Branch.

ALLOCATION CRITERIA

- Revised 1. Urban or rural **school jurisdictions** may receive special transportation funding for **students** and **children with a disability/delay** riding on a special route designated only for the transportation of those **students** and **children with a disability/delay**

who cannot, because of the severity of their disability/delay, use the transportation services described in Sections 1.19, 1.20, or 1.22 of this manual. The metro urban **school jurisdictions** (Edmonton and Calgary) are eligible for ECS Special Transportation funding under this section. (NOTE: all students on a special route must be claimed under the same section.)

2. Special Transportation funding is also provided for **children with special needs** who, because of their young age, are not able to ride regular transportation.

This includes **children with a severe disability/delay** (ages 2.5 to 4.5 years), and **children with a mild or moderate disability/delay** and **funded children** who are gifted and talented (ages 3.5 to 4.5 years).

3. Program or **school** location shall not be considered when determining eligibility for this funding.
4. Special Transportation funding is provided for **children with a disability/delay** and **students with a disability** who require special transportation between their residences or boarding places (boarding refers only to **students with a disability**) and:

- a) the **school** of a **school jurisdiction**;
- b) a **funded accredited private school**;
- c) a **private ECS operator**; or
- d) a program at an **institution** operated and/or funded by Alberta Education:
 - (i) which the **student with a disability** has been directed to attend by the **school jurisdiction** because the **school jurisdiction** does not operate a suitable program, or
 - (ii) which is the closest suitable and available program offered.

5. To claim Special Transportation funding for a **student with a disability** attending a **funded accredited private school**, the **school jurisdiction** must have directed the student to attend that **school**.

6. Weekend Transportation

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

- (ii) a **funded accredited private school**.
- b) funding for weekend transportation is paid to the **school jurisdiction** of the **district** or **division** in which the **parent** of the **student with a disability** resides.

ECS SPECIAL TRANSPORTATION – the following items apply for transportation of ECS children with a disability/delay:

- New 7. Total Days Transported: funding will be paid based on the number of days that an ECS child is transported to/from the **ECS program** – to a maximum of 185 days.
8. **Family-Oriented ECS Programming Transportation (Funded children only)**:
- a) **family-oriented ECS programming** transportation means transportation for each scheduled **family-oriented ECS programming** session (formerly home visit) made by a teacher, a child development specialist, or a teacher assistant to the home of a **child with a disability/delay** receiving **family-oriented ECS programming**.
 - b) the following applies to the number of sessions (formerly home visits) that may be claimed for **Family-Oriented ECS Programming** Transportation funding:
 - (i) a minimum of 4 sessions and a maximum of 36 sessions for a program unit **funded child**;
 - (ii) a maximum of 22 sessions for a **child with a mild or moderate disability/delay**.
9. Transportation costs incurred for field trips or in-program activities cannot be claimed under this funding. These costs may be claimed for **children with a severe disability/delay** under Program Unit Funding.

DOCUMENTATION AND REPORTING REQUIREMENTS

- Revised 1. **School jurisdictions** are required to submit electronically their claims to the School Reporting 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*.

New 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 School Reporting Branch by November 30.

2. Transportation support payments for each new school year will be paid at 100% of the previous year's funded monthly amount until review of the new funding application has been completed. If the new funding application has not been received on December 31, the January payment will be reduced to 75% of the previous year funded monthly amount retroactive to September 1 and continued until the new funding application is received and reviewed.
3. The **count date** for special transportation funding is September 30. Special consideration on **count dates** may be given to **school jurisdictions** experiencing exceptional growth in transportation needs.
4. **School jurisdictions** are required to retain the following information on file for a minimum of seven years and make it available for review by Alberta Education upon request. Items a), b), and c) should be kept in an electronic file and be made available to Alberta Education either electronically or on computer disc.
 - a) electronic geographic roadway maps of overall attendance areas and transportation services areas;
 - b) location of each student's residence (street addresses in towns, villages and hamlets, and where available in rural areas, and legal land descriptions in all other rural areas);
 - c) maps of individual bus routes;
 - d) records of **route distance** verified by an official(s) of the **school jurisdiction**;
 - e) copies of **education service agreements**;
 - f) copies of transportation agreements with **school boards, private schools, charter schools** and **private ECS operators**;
 - g) copies of current vehicle inspection certificates issued under the *Highway Traffic Act*; and
 - h) copies of contracts with:
 - (i) written **transportation agreements** with agents, organizations, **parents** or other persons;
 - (ii) records showing the amount to be paid on behalf of **students with a disability** requiring special transportation.

ADDITIONAL INFORMATION

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

ALLOCATION FORMULA

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

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

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

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

- c) ECS **funded children** will be included in the Metro Urban Transportation Block 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 co-efficient will be reduced from 0.735 to 0.730.

ALLOCATION CRITERIA

1. Edmonton School District No.7, Edmonton Catholic Separate School District No. 7, Calgary School District No. 19 and Calgary RCSSD No. 1 school districts are eligible for Metro Urban Transportation Block 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 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**, Designated Home Education **Schools**, and other special **schools** (**schools** where the majority of the **funded students** are special needs students) as determined by School Finance are excluded;
 - b) an ECS-elementary school with fewer than 75 students is not counted;
 - c) an ECS-elementary school with 75 or more students and 3 or fewer grades will be counted as half an ECS-elementary school;
 - d) a junior high school with fewer than 75 students is not counted;
 - e) a senior high school with fewer than 75 students is not counted; and
 - f) a senior high school with fewer than 200 but with 75 or more students is counted as a junior high school.

5. The formula used to calculate Metro Urban Transportation block 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 Block funding. The ECS enrolments will be included in the formula.
7. **ECS children with disabilities** who require special transportation will be funded outside of the Metro Urban Transportation block formula at the ECS Special Transportation rate. Transportation funding for **children with disabilities** should be claimed under Section 1.21 of the Manual. **ECS children with a severe disability** who qualify for Program Unit Funding (PUF) cannot be included in the count of **students with severe disabilities** in the Metro Urban Transportation formula.
8. **School jurisdictions** receiving Metro Urban Transportation funding must transport or make arrangements for the transport of **children** attending **ECS programs** at a service level that is consistent with the transportation of students under Section 51(1) of the *School Act*.
9. When a metro urban district is accessing the Metro Urban Transportation Block funding and has under its jurisdiction an area included in another municipality, the metro urban district may be reimbursed for each **eligible passenger** transported to **school** using the rural transportation formula, or, if the municipality is a city outside of Calgary or Edmonton, for each **eligible passenger** using the Urban Transportation formula. A metro urban district currently claiming under this section and seeking to claim either Rural Transportation (Section 1.19) funding, or Urban Transportation (Section 1.20) funding, must have approval from the **Minister**. Requests for approval should be submitted to the School Reporting Branch.
10. A metro urban district, which has made an arrangement with a **charter school** to transport the **charter school's** students, may include the **funded students** attending the **charter school** for the purposes of calculating the number of **expected eligible passengers**. The **charter school** is not counted by the **school jurisdiction** in determining the number of **schools**.

DOCUMENTATION AND REPORTING REQUIREMENTS

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

ADDITIONAL INFORMATION

1. A **school jurisdiction** providing transportation to and from an **ECS program** may charge the **parent** of a **funded child** a fee for the transportation service. The total amount of the transportation fee charged to **parents** shall not exceed the total cost of the provision of ECS transportation services less the ECS transportation funding the **school jurisdiction** receives from Alberta Education.
2. The basic block formula will continue for the 2005-2006 school year.
3. **School jurisdictions** may also qualify for Relative Cost of Purchasing Goods and Services Adjustment (RCPA) funding for transportation services. Please see details in Section 1.17.

New

ALLOCATION FORMULA

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

ALLOCATION CRITERIA

1. The relative weighting factor (see Funding Rates) is applied to the Learning Grant Rate to determine the **Francisation** Rate for Canadian-born ECS **funded children** and **funded students** (Code 306) and Foreign-born ECS **funded children** and **funded students** (Code 307). Non-Francophone authorities offering **Francisation** services through an agreement with a **Francophone regional authority**, must use Codes 306 and 307 with Code 145 when registering a Francophone student.
2. A **Francophone regional authority** with students who have insufficient fluency in French to achieve grade level expectations in Français and other subject areas may receive **Francisation** funding for eligible **funded children** counted at 0.5 full-time equivalent and eligible **funded students** in Grades 1 to 12.
3. Students eligible for **Francisation** funding:
 - a) have homes in which the primary spoken language is not French; and
 - b) have minimal French or are non-French speaking.
4. There are two enrolment counts taken for funding both Canadian-born **Francisation** students (Code 306) and Foreign-born **Francisation** students (Code 307) – September 30 and March 1. The March 1 count provides funding for in-year growth in both Canadian-born **Francisation** enrolments and Foreign-born **Francisation** enrolments. Each count will be used for funding 50 percent of the school year, except, if the March 1 count of **Francisation** students is less than the September 30 count, then the September 30 count will be used for the entire school year.
5. Coding of an eligible **Francisation funded child/student** must be supported by an annual assessment of the student's language proficiency in French. This assessment documentation must be kept on file at the **school** and made available upon request.

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

DOCUMENTATION AND REPORTING REQUIREMENTS

1. September 30: Student registration information for ECS to Grade 12 as of September 30 of the current school year that is submitted to the Information Services Branch by October 5. This registration will include Canadian-born (Code 306) and Foreign-born (Code 307) **Francisation** students. This coding of **francisation** students is required for **francophone regional authorities** to receive funding.
2. March 1: Student registration for ECS to Grade 12, **Francisation** Canadian-born and Foreign-born, as of March 1 and submitted to the Information Services Branch by March 6.
3. **Francophone regional authorities** cannot claim both **Francisation** funding and ESL funding for the same child.
4. See Section 1.25 for funding of Enhanced ESL and Support Services for Immigrant Students.

ALLOCATION FORMULA

Revised	Base Year Stabilization Calculation	=	Total Eligible Funding under the renewed Funding Framework (2003-2004)	-	Total Eligible funding under the Previous Funding Framework (2003-2004)
	Stabilization Allocation	=	Base Year Stabilization Calculation	+	Annual grant rate increase adjusted for Funded Enrolment Decline

ALLOCATION CRITERIA

1. The 2003-2004 school year total eligible funding from Alberta Education is the base year amount from which Stabilization funding will be determined. This base year amount was finalized in April 2005 when actual funding for the 2003-2004 school year was complete.
2. The established 2003-2004 base year amount will receive annual funding rate adjustments commencing in the 2004-2005 school year, and will also be adjusted for funded enrolment decline commencing in the 2005-2006 school year.
3.
 - a) In September each year using previous year enrolments, **school jurisdictions** estimates of current year enrolments and current year funding rate change will be used to estimate Stabilization funding.
 - b) In June each year, the Stabilization funding for the current year will be finalized when the current year funded enrolments are finalized. This adjustment will commence in the 2005-2006 school year.
4. The following example shows how Stabilization funding is determined over a two-year period.

SECTION 1.24

STABILIZATION FUNDING

EXAMPLE
STABILIZATION FUNDING

Enrolment Data:		
Year	Funded Enrolment	% Change
03/04	5100	0%
04/05	5100	0%
05/06	5050	-1.0%

2003-2004 Base Year Calculation	
	Total Eligible Funding
Current Framework:	\$35,912,000
RFF:	\$34,612,000
Stabilization Funding	<u>\$1,300,000</u>
* Before funding rate increase for the 2004-2005 school year.	

ADJUSTMENTS: Assumed Funding Rate increase of 2% each year and enrolment decline in the second year:

2004-2005:

$$\$1,300,000 \times \frac{5100}{5100} \times 1.02 = \underline{\$1,326,000}$$

2005-2006:

$$\$1,326,000 \times \frac{5050}{5100} \times 1.02 = \underline{\$1,339,260}$$

FUNDING ALLOCATION DETAILS

	2004-2005	2005-2006
Base Instruction – ECS to Grade 12	\$25,676,000	\$25,932,000
Outreach Program	52,000	53,000
Home Education	25,000	25,000
Severe Disabilities (profile)	2,272,000	2,295,000
ESL/Francisation	71,000	72,000
First Nations, Métis	519,000	524,000
Socio-Economic Status	461,000	465,000
ECS – Mild/Moderate, Gifted and Talented	106,000	107,000
Northern Allowance	272,000	274,000
Intra-Jurisdiction Distance	292,000	294,000
Small Board Administration	-	-
Small Schools by Necessity	655,000	661,000
Program Unit Funding	380,000	384,000
Learning Resources Credit	46,000	46,000
Transportation	3,719,000	3,756,000
RCPA	24,000	24,000
Hutterite Colony Funding	24,000	24,000
Sub Total	\$34,570,000	\$34,912,000
Stabilization Funding	1,326,000	1,339,260
Sub Total	\$35,896,000	\$36,251,260
Enrolment Growth	6,000	-
Enrolment Decline	10,000	20,000
AISI	712,000	719,000
Student Health	-	-
High Speed Networking	-	-
Enhanced ESL and Support Services for Immigrant Students	7,000	7,000
Class Size	1,000,000	1,200,000
Total Funding	\$37,631,000	\$38,197,260

SECTION 1.25

**ENHANCED ESL/FRANCISATION AND
SUPPORT SERVICES FOR IMMIGRANT STUDENTS FUNDING**

ALLOCATION FORMULA

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

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

ALLOCATION CRITERIA

1. This funding recognizes students who are functionally illiterate in their language of origin, have little or no exposure to English or French, have little or no formal schooling, have significant challenges to successful enculturation and have been exposed to traumatic events in their country of origin arising from political or civil unrest. This allocation recognizes the costs associated with hiring ESL liaison workers and providing coordinated services for these students.
2. Funding for this program will be based on the following counts as determined under Sections 1.8 and 1.23:
 - a) Code 301: ESL Foreign-born **funded children** (counted at 0.5 FTE) and Foreign-born **funded students**; and
 - b) Code 307: **Francisation** Foreign-born **funded children** (counted at 0.5 FTE) and Foreign-born **funded students**.
3. There are two enrolment counts taken for the Enhanced ESL and support Services for Immigrant Students funding. The counts will be the Foreign-born ESL counts (Code 301) and Foreign-born **Francisation** counts (Code 307) – September 30 and March 1. The March 1 count provides funding for in-year growth. Each count will be used for funding 50 percent of the school year except, if the ESL or **Francisation** Foreign-born March 1 count is less than the September 30 count, then the September 30 count will be used for the entire school year.
4. **Francophone regional authorities** cannot claim both Enhanced **Francisation** funding and Enhanced ESL funding for the same child/student.

NEW

ALLOCATION FORMULA

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

ALLOCATION CRITERIA

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

DOCUMENTATION AND REPORTING REQUIREMENTS

1. School information for funded students enrolled as of September 30 must be submitted to the Information Services Branch by October 5.
2. **School jurisdictions** are not required to apply for funding under this section. The School Finance Branch will determine the funding allocation for each **school jurisdiction**.

ADDITIONAL INFORMATION

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

NEW

ALLOCATION FORMULA

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

ALLOCATION CRITERIA

1. The number of colony **schools** to be funded will be determined based on the colony **schools** with funded enrolments on September 30.
2. **School jurisdictions** will not charge a fee or surcharge to the Hutterite Colony for the basic education of students in Hutterite colony **schools** (see exception described in #3).
3. When a **school jurisdiction** believes that the cost of providing services for students in colony **schools** exceeds the funding they are receiving for those students, then they may make application to the Assistant Deputy Minister, Corporate Services Division, Alberta Education to levy a fee on individual Hutterite colonies. Before making application, **school jurisdictions** must have:
 - pooled all funding associated with the colony **school(s)** – this includes Hutterite Colony Schools funding, Base Instruction funding, Socio-Economic Status funding, and Special Needs funding;
 - consulted with the Hutterite colony(ies) affected when developing the application.

DOCUMENTATION AND REPORTING REQUIREMENTS

1. **School jurisdictions** must submit September 30 student registration information for colony **schools** to the Information Services branch by October 5.

ADDITIONAL INFORMATION

1. This funding enables eligible **school jurisdictions** to address the higher costs associated with providing programs in Hutterite colony schools.
2. The Hutterite colony school rate will receive the same grant rate increase as other funding areas.

NEW

ALLOCATION FORMULA

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

ALLOCATION CRITERIA

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

DOCUMENTATION AND REPORTING REQUIREMENTS

1. Francophone school authorities must submit September 30 student registration information to the Information Services Branch by October 5.
2. Francophone school authorities are not required to apply for funding under this section. The School Finance Branch will determine the funding allocation.

ADDITIONAL INFORMATION

1. This funding enables Francophone school authorities to provide their students access to programming that is equivalent to that being offered by English-language **schools** in the community -in accordance of the *Canadian Charter of Rights and Freedoms* (Section 23)

ALLOCATION FORMULA

Revised The formulas and requirements for funding that apply to **school jurisdictions** under Part 1; Section 3.3 of Part 3; Part 6; and Part 7 also apply to **charter schools**; however, **charter schools** are not eligible to claim funding for Home Education and Debt Retirement.

ALLOCATION CRITERIA

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

DOCUMENTATION AND REPORTING REQUIREMENTS

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

ADDITIONAL INFORMATION

1. Funding may be advanced on a one-time basis to any newly approved **charter school**.
2. Funding for **students with severe disabilities** attending **charter schools** is provided based on the eligibility of individual students.

REFERENCES

Charter Schools Handbook

Charter Schools Policy 1.1.1

Charter Schools Regulation AR 212/2002

PURPOSE

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

CONDITIONS

1. Base Instruction funding is provided to **ECS operators** for each **funded child** enrolled in an **ECS program** which provides access to at least 475 hours of instruction. Some modification to this requirement is allowed for **children with special needs** (mild, moderate, or severe and gifted and talented) who because of their special needs or young age cannot be accommodated by a 475-hour program (i.e., they may require more or fewer hours). Also some **children with special needs**, either because of their disability or young age, may benefit from a combined program involving **school** hours and **family-oriented ECS programming** sessions (formerly home visit). A combined program must have a minimum of four **family-oriented ECS programming** sessions to qualify for funding. See definition of **family-oriented ECS programming** in the Glossary of Terms for more details.

New

Note: The ECS Base Instruction rate for **private ECS operators** has been increased to equal the ECS Base Instruction rate that **school jurisdictions** receive. Funding previously provided for under ECS Teacher Salary Enhancement, ECS Program Enhancement Projects, and ECS Early Literacy has been combined with the previous ECS Base Instruction funding to provide the new increased ECS Base Instruction rate. Therefore, these sections of the Funding Manual are deleted.

2. An approved **ECS operator** must be prepared to accept and organize programming for all **funded children** for whom programming is requested, including **children with special needs**.
3. A **child** referred to in Section 30(1)(a) of the *School Act* is not a resident or non-resident student of a **board**, therefore, approved **ECS operators** shall not use the residency or non-residency of the **parent** of a child in a district or **division** to:
 - a) deny a **funded child** access to the program; or
 - b) differentiate as to the fees charged for the program.

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

However, if a **funded child** is attending more than one **ECS program** on September 30 and a resolution cannot be reached as to which **ECS operator** should count the **funded child**, then the ECS Base Instruction funding will be split accordingly. For example, a **funded child** may be enrolled in a morning program with one **ECS operator** and also enrolled in an afternoon program with another **ECS operator**.

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

5. **ECS operators** are eligible for one year of Base Instruction funding for regular ECS **funded children**. **Funded children** must be at least 4 years 6 months of age and less than 6 years of age on September 1. The minimum age may vary depending on the **school** entrance age policy of the **school authority** the child will enter. Alberta Education will not provide more than one year of funding for a regular ECS **funded child**.
6. An ECS **child with a disability/delay** may qualify for more than one year of funding. See definition of **funded child** in the Glossary of Terms.
7. Alberta Education provides funding for a basic 475 hour **ECS program** which includes support for instructional salaries and benefits, learning resources, furnishings and equipment. **ECS operators** may not charge a fee for services provided within the basic 475 hour program.
8. An **ECS operator** may charge a fee to **parents** of **funded children** in a basic 475 hour program to offset non-instructional costs such as supplies, snacks, and field trips.
9. **ECS operators** that offer an **ECS program** with more than 475 hours may charge a reasonable fee to cover the cost of additional hours.
10. Individuals age 5 years 6 months or older, but less than 6 years of age on September 1 are counted as **funded students** (rather than as **funded children**) if they are eligible to enter Grade 1 under the **school** entrance age policy of a **school jurisdiction**. The exceptions to this are:
 - a) if the **funded child** has spent less than the number of years in the program for which he/she is eligible for funding, i.e., received less than three years program unit funding; or

- b) if the **funded child** has not enrolled in an **ECS program** prior to this age; or
- c) if the **funded child** has been identified as **developmentally immature** (Code 10). This child is not eligible for special needs funding and should not have been identified as special needs in prior years.

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

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

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

12. An individual who is eligible to proceed to Grade 1, but has been identified as **developmentally immature** and whose program plan involves both ECS and Grade 1 instruction may be counted either as a **funded child** or as a **funded student**.
13. Individuals aged 6 to 7 years old, who require another year of ECS and who have been assessed as having special needs (mild, moderate, severe or gifted and talented) must be counted as **funded students**.
14. Under no circumstances can an individual be counted as both a **funded student** and as a **funded child** in the same school year.
15. An **ECS operator** that receives provincial funding must ensure that **parents** can access a basic **ECS program** of 475 hours for their **funded children** without any charge for instruction.
16. When a **funded child** (not a special needs child) lives in a remote area and where there is no ECS **school** program within a reasonable transportation **distance**, the **school jurisdiction** may provide an **ECS home program** so that the child may have the opportunity to experience an **ECS program**. The program must be planned, delivered and evaluated by a certificated teacher. Twenty-two visits to the family home for a minimum of 1.5 hours each is 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**.

New

REQUIREMENTS**1. New Private ECS Operators**

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

2. Existing Private ECS Operators

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

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

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

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

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

- 5. All private ECS operators** must advise their respective Zone Services Branch within one week of any changes which occur in facility, society, programs, or teaching staff during the school year. **Funded accredited private schools** must send a list of any teaching staff changes to their respective Zone Services Branch by September 19.

6. A **private ECS operator** must maintain a blanket fidelity bond with respect to the **private ECS operator** for employees and **board** members in the amount of \$50,000 or the accumulated surplus plus 40 percent of Alberta Education funding for the program year (the value of the first payment in the first month of operation), whichever is less.
7. Funding for ECS Base Instruction is made on the basis of the **funded child** registration information submitted to the Information Services Branch.
8. Funding for ECS Base Instruction is calculated by multiplying the number of eligible **ECS funded children** by the rate for ECS Base Instruction.
9. For **ECS programs** beginning in September, the **count date** is September 30 and the information must be submitted by October 5 to the Information Services Branch.
10. For **ECS programs** beginning after September 30 the count will be taken as of the last **operating day** in the month in which the **ECS program** begins. The information must be submitted within three weeks of that day to the Information Services Branch.
11. If any adjustment is required to the enrolment data reported to the Information Services Branch, the **private ECS operator** must either complete the "Add, Modify, Delete" form (Form 05AE1.2c) and submit to the School Finance Branch or submit the data using the Funding Events System (FES) by the April 28 deadline.
12. An **ECS home program** must be approved by the Director of the Governance and
New Program Delivery Branch on an individual child basis.

CONSIDERATIONS

1. **ECS operators** who are intending to cease operation of an **ECS program** should refer to the policy in the Appendices section of this Manual.
2. Refer to Section 7.7 for additional information on Enrolment Counts and Conflicts.

FEES AND DEDUCTIONS

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

2. Access Copyright (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 **private ECS operators**. The cost of the license, plus GST, is recovered from **private ECS operators** on a full-time equivalent student basis. It is up to the individual **private ECS operators** to apply for any GST rebate from the Government of Canada.

3. Edulink:

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

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

Alberta Education will forward the maintenance fee of \$195,000 to Edmonton Catholic **Schools**, the host **board**. This funding will provide for the annual maintenance budget, but is not sufficient enough to pay for significant changes to the software.

REFERENCES

ECS Advisory Manual on Early Childhood Services, August 2004

Kindergarten Program Statement Revised September 2000

Early Childhood Services Policy 1.1.3

Early Childhood Services Regulation AR 31/2002

PURPOSE

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

CONDITIONS

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

REQUIREMENTS

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

4. For **funded children** who have been assessed as having a mild or moderate disability/delay or identified as being gifted and talented after the September 30 count has been submitted, but who were enrolled in the program on September 30, an “Add, Modify, Delete” form (Form 05AE1.2c) must be completed and submitted to School Finance by the April 28 deadline to receive this funding.
5. **ECS operators** receiving this funding must offer educationally based programs that meet the needs of **children with mild or moderate disabilities/delays** or **funded children** who are gifted and talented.

CONSIDERATIONS

1. Funding for **children with mild or moderate disabilities/delays** or **funded children** who are gifted and talented is calculated by multiplying the number of **children with mild or moderate disabilities/delays** or **funded children** who are gifted and talented (exceptional student Code 30 or 80 and grants program Code 500) on September 30 by the mild/moderate rate.
2. Programs serving **children with mild or moderate disabilities/delays** and **funded children** who are gifted and talented may be monitored by Alberta Education.

REFERENCES

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

Early Childhood Services Policy 1.1.3

Guide to Education: ECS – Grade 12

PURPOSE

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

CONDITIONS

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

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

REQUIREMENTS

1. A PUF application must be submitted (Form 05AE2.3a) to the School Finance Branch by January 3. Payment is based on approval of this application. Applications may be submitted either on paper or electronically using the Program Unit Funding System (PUFS). A separate PUF application must be completed for each **school** that has **funded children** eligible for PUF. As part of the application an individual budget must be submitted for each program unit listed on the application. Revisions to PUF applications will be accepted until May 1. Assessment information must be sent to the Special Programs Branch for approval of a child's eligibility prior to submission of a PUF application.

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

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

3. An application for a **funded child** who is diagnosed or registered after January 3 will be accepted until May 1, using the process described in #1.
4. When a **funded child** leaves a program before the end date specified on the PUF application please notify Alberta Education of the changes by submitting the PUF Application Adjustments Form (Form 05AE2.3b) to the School Finance Branch within 30 days of the child's departure. The original budget total and ceiling will then be adjusted.
5. When a **child with a severe disability/delay** moves from one **ECS operator** to another, a new PUF application based on the **IPP** must be submitted by the second operator prior to May 1 of the program year.
6. All **private ECS operators** must report actual expenditures on the schedule pertaining to Program Unit Expenditures in the Audited Financial Statements which are due November 30.
7. If a program unit **funded child** has a medical condition/disability which has not changed significantly since the initial diagnosis and was previously approved by Alberta Education, current documentation outlining assessments, treatment and current level of functioning may be sufficient to ensure continuation of PUF. This information should be kept on file and available for review by Alberta Education.

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

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

It is the responsibility of the **private ECS operator** to ensure that all **funded children** claimed under PUF meet the eligibility criteria outlined. **ECS operators** that are uncertain about the eligibility of a **funded child** are encouraged to contact the Special Programs Branch for confirmation of eligibility.

8. **Clustering** (see definition in Glossary of Terms) should be the first option considered for PUF children especially for children with a **Severe Delay Involving Language** (Code 47). Whenever possible operators should cluster program unit **funded children** with similar needs who receive services in the same setting at the same time or who share resources (regardless of setting). The decision to cluster **funded children** into a program unit should be based on the educational needs of the program unit **funded children**.

Revised

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

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

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

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

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

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

10. To access the full ceiling amount, the program offered must be a full-time program. A full-time program must provide either 800 hours of educational programming for a program unit **funded child** in **centre-based ECS programming** or a minimum of 36 **family-oriented ECS programming** sessions (formerly home visit) during the school

year, or the equivalent combination of hours and sessions. Special Programs Branch may review the setting and level of program to ensure these meet the educational needs of the child.

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

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

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

For **ECS operators** who are providing a program for a **child with a severe disability/delay** in the regular ECS classroom:

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

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

a) Instructional costs

- (i) Salaries, wages and employer's portion of benefits and expenditures applicable to teacher assistants directly involved in planning, implementing and evaluating the program for the program unit **funded child(ren)**. The number of hours claimed here may exceed the **funded child's** program hours by up to 10 percent for each child within that program unit. **Clustering** and small group program delivery should be considered as alternatives to full-time direct one-to-one assistance. Teacher Salary costs are not eligible costs under this category. (See Additional Information #7 on page 10 of this section).

- (ii) Services Purchased – includes services of qualified personnel in the areas of speech-language pathology, occupational therapy, physical therapy, orientation and mobility training, special education consultation, psychological and other services, and assessment costs that are not provided free by public service agencies. Costs should be reasonable. Operators must keep records of all services purchased under PUF. All options regarding service delivery should be considered. Operators must ensure that all services purchased are relevant to the child's educational program and are in direct support of the goals and objectives included on the child's **IPP**.

Special Education Consultation is a service purchased by the **private ECS operator** to provide programming support for the ECS teacher. Examples of services provided under Special Education Consultation include assistance with **IPP** development and review, programming strategies, suggested resources and materials and support of the off-campus components of the program. Special education consultation is delivered by a certificated teacher with the appropriate training and experience. On-site special education consultation costs are additional costs to the **private ECS operator** that provide direct programming support. These costs will be subject to a maximum of \$1,500 per program unit **funded child** based on a full-time program. For programs less than 800 hours, the \$1,500 maximum will be pro-rated based on the program hours and number of eligible **family-oriented ECS programming** sessions (formerly home visits). For example, special education consultation costs for 475 hours and 6 **family-oriented ECS programming** sessions (formerly home visits) would be calculated as follows:

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

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Some daycare fees may be claimed as an eligible PUF cost under Services Purchased. For **ECS operators** contracting placement in a Day Care and for Day Cares with approved ECS status the following apply:

- in circumstances where a program unit **funded child** is placed in a day care program because the location is the best place to implement the **IPP** for the **funded child**, the fees only for the education component portion of the day may be claimed under PUF. The education component should reflect a typical education schedule;
- costs for childcare are not eligible to be claimed under PUF.

Costs for special education administration may not be claimed in this category. These costs are covered by ECS Base Instruction funding.

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

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

Funding for transportation of program unit **funded children** is available under Section 2.5 ECS Special Needs Transportation funding and under Section 2.4 ECS Regular Transportation funding. Funding for these sections may be applied for by submitting electronically an ECS Transportation Application.

PUF may pay for any transportation costs not covered by the above transportation grants. To determine the amount of transportation costs that may be covered by PUF, all transportation costs must be listed on the PUF budget, then all transportation revenues (from the above transportation grants) must be deducted from the transportation costs. The following descriptions indicate the types of transportation costs which can be claimed and which transportation grants are available. Note: transportation claims must be submitted to the School Reporting Branch by November 30 and only program unit **funded children** who were enrolled by September 30 are eligible.

- (i) Transportation to and from school: Transportation funding for these costs may be claimed under Section 2.5 for a program unit **funded child** who requires special transportation; e.g. handi-bus, when, because of the severity of his or her disability or because of the program unit **funded child's** age, the program unit **funded child** cannot ride regular transportation or be transported under Section 2.4 by a regular

Revised

bus. Transportation costs for **children with severe disabilities/delays** in excess of the funding paid under Section 2.4 or 2.5 may be claimed as transportation costs under PUF;

- (ii) **Family-Oriented ECS Programming sessions** (formerly home visits): Transportation funding for these costs may be claimed under Section 2.5 for each scheduled session made by a member of the child's learning team to the home of a program unit **funded child** who has **family-oriented ECS programming** sessions as part of his/her **ECS program**. Funding provided under Section 2.5 is based on the number of **family-oriented ECS programming** sessions up to a maximum of 36 sessions. Transportation costs in excess of the funding paid under Section 2.5 may be claimed as transportation costs under PUF;

- (iii) **Other – Field Trips**: Transportation costs for field trips that are provided in addition to field trips for the regular ECS class or for a program unit **funded child** who, because of his/her disability/delay, requires special transportation on a regularly scheduled field trip may be claimed under PUF; and

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- (iv) **In-Program**: Transportation costs for this area may be claimed as transportation costs under PUF. In-program transportation is transportation of the program unit **funded child** from the **school/centre** program off-site to another program or service as part of the **funded child's Individualized Program Plan (IPP)**.

e) Operation and Maintenance

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

f) Administration

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

g) Capital: Furniture and Equipment – these are child specific expenditures for specialized furniture and equipment that are not available free or subsidized by another source, and are required to meet the special needs of a program unit **funded child**.

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

costs of the capital equipment. This letter should be attached to the PUF application.

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

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

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

- a) Approval by Special Programs Branch is required to qualify for this status.
- b) **ECS operators** who qualify for this status may claim all education program costs except capital building costs.
- c) A budget based on the total education program costs must be submitted on the program unit funding application budget page for **Designated Special Education ECS programs**.
- d) Operation & Maintenance costs: This would include costs associated with the operation and maintenance of the **school** facility and would also include rent costs. PUF will cover costs that exceed the funding provided under Section 2.6 of this Manual.
- e) Administration: Reasonable costs for administration of the **ECS program** may be claimed here. Costs in this area are typically in the 6% to 12% range. System Administration funding revenues will be applied to these costs as per item (g).

- f) Capital costs must meet the specific needs of a program unit **funded child** or a group of program unit **funded children** to be eligible. An itemized list of capital must be included with the application if costs are claimed in this category.
- g) Alberta Education will apply all applicable revenues to the total program costs (such as ECS Base Instruction funding, mild/moderate funding, Program Enhancement Project (PEP) funding, ECS Transportation funding and other applicable revenues) to determine a net program cost total to which the program unit funding will apply.
- h) **Designated Special Education ECS programs** must comply with all Conditions, Requirements and Considerations on Program Unit Funding outlined in Section 2.3 of this Manual. These programs must also comply with the principles contained in Alberta Education's *Kindergarten Statement Revised September 2000*.

Revised i) Applications for new programs must be submitted as a proposal to the Director of the Special Programs Branch by June 1, 2005 for approval. To be considered for this designated status, the program must have operated as an **ECS operator** for at least one year and must have a minimum enrolment of at least 10 program unit **funded children**. Newly designated programs will be subject to program review within the first year. The proposal should contain the following information:

- a rationale for applying for status as a **Designated Special Education ECS program** including the potential benefits to children with severe special needs and their families. The rationale should also explain why the program could not operate as a regular **ECS program** and should highlight how receiving the designated status would resolve those issues;
- an overview of the proposed program including population served, program format, service delivery model, support services provided, opportunities for inclusion, transition to the community **school** and a brief summary of the role descriptions of program staff;
- a proposed budget completed using Form 05AE2.3a. This budget should outline all estimated expenditures and projected revenues; and

New j) **Designated Special Education ECS programs** must maintain a minimum enrolment of at least 10 program unit **funded children** to retain their designated status.

New k) Existing **Designated Special Education ECS programs** must apply to the Special Programs Branch to expand to another site or location.

- l) The status of approved **Designated Special Education ECS programs** may be reviewed and withdrawn at any time by Alberta Education.

CONSIDERATIONS

1. A **child with a severe disability** who:
 - a) is at least 5 years 6 months but less than 6 years of age on September 1 of the school year in which s/he is counted; and
 - b) is eligible to enter Grade 1 under the **school** entrance age policy of a **school jurisdiction**; and
 - c) has not spent 3 years in an **ECS program**,

may be eligible for PUF if, in the opinion of the **school jurisdiction**, **parent** and **private ECS operator**, an **ECS program** is the most appropriate placement for the child.
2. The calculation of the ceiling amount for a program unit with one **funded child** in it using examples of **centre-based ECS programming**, and a program based on a combination of **centre-based ECS programming** hours and **family-oriented ECS programming** sessions (formerly home visits) is determined as follows:

Calculation of the ceiling for <u>centre-based ECS programming</u> of 500 hours	Calculation of the ceiling for a <u>combined program</u> based on 500 centre-based ECS programming hours and 10 family-oriented ECS programming sessions.
$\frac{500 \text{ hrs}}{800 \text{ hrs}} \times \$22,141$ $= \$13,838$	$\left\{ \frac{500}{800} + \frac{10}{36} \right\} \times \$22,141$ $= \$19,988$

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

3. The maximum program unit rates should be viewed as ceilings only. Provincial averages indicate the cost of most programs average about \$14,000 per program unit funded child. Careful stewardship of funds by **private ECS operators** is integral to the PUF program.

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

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

$$\left\{ \frac{\# \text{ hours}}{800} + \frac{\# \text{ sessions}}{36} \right\} \times \$22,141$$

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

$$+ \left\{ \frac{\# \text{ hours}}{800} + \frac{\# \text{ sessions}}{36} \right\} \times \$5,493$$

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

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

The ceiling is then calculated as follows:

$$\begin{aligned} & \left[\frac{500}{800} + \frac{10}{36} \right] \times \$22,141 = \$19,988 \\ & + \left[\frac{400}{800} \right] \times \$5,493 = \$2,747 \\ & + \left[\frac{600}{800} + \frac{4}{36} \right] \times \$5,493 = \$4,730 \\ & = \text{Total ceiling for the unit} \quad \underline{\$27,465} \end{aligned}$$

5. Funding ceiling amounts will be adjusted when a **funded child's** program starts after September 30 and prior to May 25. Funding ceiling amounts will also be adjusted when a **funded child** leaves the program earlier than planned. In these situations, the ceiling will be the lesser of:
- A pro-rated ceiling amount of approximately \$2,214 per month for the number of months the program runs; or
 - The ceiling amount based on **centre-based ECS programming** and the number of **family-oriented ECS programming** sessions (formerly home visits) provided.

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

Ceiling calculation for a 4 month program in a 10 month program year	
Lesser of:	
a)	$\$22,141 \times 4/10 = \$8,856$ or
b)	$\$22,141 \times (300/800 + 4/36) = \$10,763$
Ceiling amount is \$8,856	

6. **Family-Oriented ECS Programming** Sessions: What Counts as an eligible session and what doesn't.

New

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

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

of 45 minutes and can be counted as a 0.5 session. A school authority can claim a maximum of one session per child per year for consultation.

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

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

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

REFERENCES

ECS Program Unit Funding: A Handbook for ECS Operators

PURPOSE

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

CONDITIONS

1. **Funded children** who reside at least 2.4 kilometres from the **ECS program** in which they are enrolled and are being transported will be eligible for transportation funding.
2. A **child with special needs** (mild, moderate or severe) who requires transportation to and from **school** residing less than 2.4 kilometres from **school** is eligible for this funding if they are able to ride regular transportation. If a claim is made under this section, no other transportation funding to and from the **ECS program** may be claimed.
3. Transportation costs incurred for field trips or other activities cannot be claimed under this funding. For **children with severe disabilities**, these costs can be claimed under the Program Unit Funding (PUF).

REQUIREMENTS

1. A **private ECS operator** that claims ECS regular transportation funding must transport, or make arrangements for the transportation of, **funded children** attending **ECS programs**. Transportation funding cannot be claimed if the **private ECS operator** has not provided or arranged transportation or if there was no cost to the **private ECS operator** for the transportation provided.
2. If the transportation of an **eligible transported ECS child** is not done by the **private ECS operator**, then a contract or signed agreement must be in place with the company or person(s) transporting the **eligible transported ECS child**.
3. The following applies for parent provided transportation where there is a written agreement or contract in place:
 - a) **parents** who transport their own child(ren) only require a class 5 operator's license and their own liability insurance.
 - b) **parents** or other individuals who use their own vehicle to transport a child that is not their own, require a class 4 operator's license and a minimum of \$2 million of liability insurance.

- Revised 4. To apply for ECS Regular Transportation funding, **private ECS operators** are required to submit electronically their ECS transportation claim form to the School Reporting Branch by November 30. Payment is made on the basis of submitted information, funding allocation criteria and funding rates. Please note that the electronic transportation claim form will have both regular and special transportation application forms. **School jurisdictions** that provide transportation for a **funded child** will claim the **funded child** as an **eligible transported ECS child** under rural transportation, urban transportation or metro urban transportation block. For further details please refer to Section 1.19, Rural Transportation; Section 1.20, Urban Transportation; and Section 1.22, Metro Urban Transportation Block.
5. For **ECS programs** beginning in September, the **count date** for transportation funding is September 30.
- Revised 6. For **ECS programs** beginning after September 30, the **count date** for transportation will be the last **operating day** of the month in which the program begins. Electronic ECS transportation claim form must be submitted to School Reporting Branch within three weeks of that date.
7. **Eligible transported ECS children** registered after the **count date** are not eligible for regular transportation funding.

CONSIDERATIONS

1. A **private ECS operator** may receive transportation funding for each **eligible transported ECS child** and transported by:
 - a) a **school bus**;
 - b) a **parent** where the **private ECS operator** does not provide bus services.
2. Private **ECS operators** may enter into agreements with **school jurisdictions** for the transportation of **eligible transported ECS children** enrolled in their programs. Funding for these children will be claimed by the **school jurisdictions** providing the transportation service.
3. A **private ECS operator** providing transportation to and from an **ECS program** may charge the **parent** of an **eligible transported ECS child** a fee for the transportation service. The amount of the fee shall not exceed the total cost of the provision of ECS transportation services less the ECS transportation funding received from Alberta Education.
4. Regular transportation funding is calculated by multiplying the number of **eligible transported ECS children** by the regular transportation rate for **private ECS operators**.

PURPOSE

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

CONDITIONS

1. Special Transportation
 - a) **private ECS operators** may receive special transportation funding for ECS **children with a disability/delay** who cannot be accommodated by regular transportation because of their disabilities and, therefore, require special transportation, such as a handi-bus.
 - b) Special Transportation funding is also provided for ECS **children with special needs** who, because of their young age, are not able to ride regular transportation. This includes **children with a severe disability/delay** (ages 2.5 to 4.5), and **children with a mild or moderate disability/delay** and **funded children** who are gifted and talented (ages 3.5 to 4.5).
 - c) program or **school** location shall not be considered when determining eligibility for this funding.
2. A **student with a disability** who is eligible to enter Grade 1 and is at least 5 years 6 months on September 1 cannot be counted for ECS transportation. These **funded students** are to be counted and claimed for transportation by the **school jurisdiction** under the rural or urban transportation funding in Part 1.
3. **Family-Oriented ECS Programming** Transportation
 - a) for the purpose of this section, **family-oriented ECS programming** transportation means transportation for each scheduled session made by a teacher, a child development specialist, or a teacher assistant to the home of a **child with a disability** enrolled in **family-oriented ECS programming**.
 - b) the following applies to the number of sessions that may be claimed for **Family-Oriented ECS Programming** Transportation funding:

- (i) a minimum of 4 sessions to a maximum of 36 sessions in the case of a program unit **funded child**, or
 - (ii) 22 sessions in the case of a regular **funded child** or a **child with a mild or moderate disability/delay**.
4. Transportation costs incurred for field trips or in-program activities cannot be claimed under this funding. For **children with a severe disability/delay** these costs may be claimed under Program Unit Funding.

REQUIREMENTS

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

The special transportation funding provided for **ECS children** is calculated by multiplying the number of **children with special needs** who require special transportation because of their disability or young age by the number of days transported. The total transportation days are multiplied by the special transportation rate. **Private ECS operators** must return the completed form to School Finance.

Funding for **family-oriented ECS programming** sessions (formerly home visits) made by a teacher or other professional is calculated by multiplying the number of scheduled **family-oriented ECS programming** sessions by the special transportation rate.

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

For **ECS programs** beginning in September:

6. The **count date** for transportation funding is September 30.

For **ECS programs** beginning after September 30:

7. The **count date** for transportation will be the last **operating day** in the month in which the program begins. Electronic ECS transportation claim form must be submitted to School Reporting Branch within 3 weeks of that **count date**.
8. **ECS children with special needs** registered after the **count date** are not eligible for special transportation funding. Transportation costs for **ECS children with a severe disability/delay** eligible to receive PUF may be claimed as a Program Unit expense.

CONSIDERATIONS

1. A **private ECS operator** providing special transportation to and from an **ECS program** may charge the **parent** of a **funded child** a fee for the transportation service. The amount of the fee shall not exceed the total cost of the provision of ECS transportation services less the ECS transportation funding received from Alberta Education.

PURPOSE

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

CONDITIONS

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

REQUIREMENTS

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

CONSIDERATIONS

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

$$\begin{aligned} & (\# \text{ funded children} \times \text{rate per funded child}) + (\text{Area rate per 25 funded children}) \\ &= (15 \times \$237) + (\$474) \\ &= \$4,029 \end{aligned}$$

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

$$\begin{aligned} & (40 \times \$237) + (\$474 \times 2) && \$474 \text{ is provided for every 25 funded children or} \\ &= (\$9,480) + (\$948) && \text{portion of 25 funded children.} \\ &= \$10,428 \end{aligned}$$

3. **School jurisdictions** with **ECS programs** will receive their Plant Operations and Maintenance funding from Alberta Infrastructure. The formula for calculating funding may be different from the one outlined in this section.

PURPOSE

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

CONDITIONS

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

REQUIREMENTS

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

CONSIDERATIONS

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

PURPOSE

This funding provides for instruction that meets the learner expectations of students (Grades 1 to 12) in core programs, complementary programs, and programs for **students with special needs**.

CONDITIONS

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

New

8. Course Completions for Students in Grades 10 to 12

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

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

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

Updated

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

- b) For regular courses delivered to students on-line or by distance learning the attendance funding criteria may not apply. Funding will be provided if the student has:
- i) earned a final mark of 50% or better in the course; or

- ii) earned a final mark of 25% or greater but less than 50% in the course and has worked on and been assessed on at least 50% of the course content.
- c) For all regular courses (non-CTS), **funded accredited private schools** must maintain course outlines, detailed assessment records of student work in the course, records of student withdrawal, student attendance, and final marks. Also see the Requirements in this section for more details.
- d) A one credit CTS course is considered completed for funding purposes when a student has worked on and been assessed on at least 50% of the course content.
- e) Funding will not be provided for a CTS course if the prerequisite(s) was not completed in the same term or a prior term.
- f) For all CTS courses, **funded accredited private schools** must maintain course outlines, detailed assessment records of student work in the course records of student withdrawal and final marks. Also see the Requirements in this section for more details.
- g) Students are not restricted in the number of credits they can take in a school year.
- h) Course Completion Statuses:
All course submissions for the 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 **funded accredited private school** agrees to remove the student from the course. When a completion status of WDR is used, the course will not appear on a student’s transcript. A course completion status of WDR may be used for all courses.
 - An “incomplete” (INC) status should be used when a student does not withdraw from a CTS course yet does not demonstrate mastery of all the learner expectations identified in the Programs of Study. An incomplete status has no associated mark(s). A course completion of INC may only be used for CTS courses.
 - When a course is reported as eligible for funding, all funding conditions must be met and all supporting documentation maintained, regardless of the completion status report.

9. Funding for Funded Students in Grades 10 to 12

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

- a) funding is provided on a Credit Enrolment Unit (CEU) basis for senior high school courses completed during regular daytime hours, weekends, evenings and the summer months, with a maximum of 60 CEUs funded per student per school year (September to August). For senior high school courses with a credit value of 3, funding is based on 2.5 CEUs. For courses with a credit value of 5, funding is based on 5 CEUs. For courses with a credit value of 1, funding is based on 1 CEU;
- Revised**b) funding is provided for credits in senior high school courses completed during weekends (Saturday and Sunday), statutory holidays, evenings (after 6:00 p.m.), and during the summer break, if instruction is provided for a minimum of:
 - 80 hours for a five credit course; or
 - 48 hours for a three credit course.
- c) funding is provided for credits in Alberta Distance Learning (ADL) courses paid by a **funded accredited private school** for students whose marks are reported by the ADLC;
- Revised**d) funding is provided for RAP, Work Experience, and other credit courses involving substantial off-site instruction;
- e) funding is provided for repeated courses if instruction is provided in accordance with the same requirements as the first time the course was taken. Funding is not provided for students repeating courses where they previously received a final mark of 100 percent in the course;
- f) funding is provided for high school credit courses completed that may not otherwise be counted towards a high school diploma (e.g. ESL 1125);
- Updated** g) funding is provided for credits earned through locally developed senior high school credit courses, where instruction is provided; and if the **funded accredited private school** is authorized to deliver the course (see Guide to Education –section on Locally Developed/Acquired and Authorized Junior/Senior High Optional Courses).
- h) funding is provided for credit-bearing religious education courses, where instruction is provided;
- i) funding is provided for credits in Special Projects 10 – 20 – 30 courses;
- Revised** j) funding is provided for students in senior high school who take a junior high course for 125 hours; the equivalent of 5 CEUs will be funded for each course completed (Form 05AE1.2a);

- k) for **students with special needs** (identified with the 500 Grants code) on September 30 and classified as senior high students, funding is provided based on 35 CEUs. Additional funding based on CEUs will be provided for course credits completed in the summer months by **students with special needs**;
- l) Integrated Occupational (IO) course credits completed will be converted to CEUs at 5/3 times credit value;
- m) students registered on September 30 and enrolled in at least one of the following ESL courses: ESL 1120, 1121, 1122, 1123 or 1125, will be funded at the rate of 17.5 CEUs per student per semester of ESL courses taken. No additional funding is provided for other courses completed during these semesters. Students taking ESL courses or non-ESL courses during the summer will be funded on a CEU basis;

funding is provided for credits granted through **challenge assessments** at 20 percent of the CEU value for the course(s) challenged;

- n) when a student takes two French as a Second Language courses by instruction in the same term only one course will be funded;
- o) funding based on 35 CEUs, is provided for senior high school students enrolled in Institutional programs (Code 550) on September 30.

10. **CEU Funding Penalty Schedule**

Updated/New

- a) A 10% funding reduction penalty will be applied for the following Access to Instructional Hours violations:
 - i) Courses where access to instruction is found to be less than 25 hours per high school credit (20.8 hours per credit for a 3 credit course).
 - ii) When a school timetables several high school courses in the same block and the access to instruction for courses offered is found to be less than 25 hours per credit.
 - iii) Courses/classes with unreasonably high enrollments where it is determined that it is not reasonable or even possible for a large number of students to have access to 25 hours of instruction per credit.
 - iv) Where a high school student does not have access to at least 1000 hours of instruction.
- b) A 100% funding reduction penalty will be applied when:
 - i) Courses taught did not follow the Program of Studies.
 - ii) A school that has been assessed a penalty previously, continues to be non-compliant.
 - iii) Courses have both access to instruction and Program of Studies contraventions.

- c) A 75% funding reduction penalty will be applied when:
 - i) Special Projects do not meet the programming requirements set out in the Guide to Education.

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

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

- a) waived or retroactive credits;
 - b) maturity credits;
 - c) courses completed by non-**resident students** and **First Nations students** as defined in the Glossary of Terms;
 - d) high school credits taken by junior high students (except for summer courses, if the student taking the course is eligible to enter Grade 10 in the next school year); this includes CTS courses completed by students in junior high school and Heritage Language high school credit courses;
 - e) post-secondary courses, including those that have been approved as locally developed courses;
 - f) credits granted through evaluation of out-of-province courses; or
 - g) extra-curricular, co-curricular or community-based activities, such as competing on an athletic team.
12. New **private schools** must obtain accreditation through the Governance and Program Delivery Branch. Final approval is given by the **Minister**. Newly qualifying **private schools** will indicate:
- a) the **school** is operated on a non-profit basis and is incorporated under the *Societies Act* or registered under Part 9 of the *Companies Act* or is incorporated under an act of the Legislature; and
 - b) the **parents of funded students** enrolled in the **school** are ordinarily residents of Alberta. (*School Act*, Section 273).
13. A **funded accredited private school** must keep in force a blanket fidelity bond with respect to the **private school** for all employees and **board** members in an amount acceptable to the **Minister**. The amount that is acceptable to the **Minister** shall be \$50,000 or the amount of the accumulated surplus plus 40 percent of Alberta Education funding for the program year (the value of the first payment in the first month of operation), whichever is less.

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

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

REQUIREMENTS

1. New **funded accredited private schools**

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

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

2. Existing **funded accredited private schools**

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

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

3. **Funded accredited private schools** must complete and return the "AOP", to their respective Zone Services Branch or complete an electronic version through the Extranet by May 31. Information on this form initiates the first payment of the coming school year.

4. All **funded accredited private schools** must advise their respective Zone Services Branch within one week of any changes which occur in **facility**, society, or programs during the school year.

5. Accredited **private schools** must send an updated list of teaching staff (based on teachers employed as of September 15) to their respective Zone Services branch by September 19, including those who have been hired subsequent to May 31. Any changes to teaching staff after September 15, should be submitted to their respective Zone Services Branches within one week of any changes.

6. Base Instruction funding is based on:

- a) student registration enrolments in Grades 1 to 9 as of September 30 that is submitted to Information services by October 5;
- b) course completion information for students in Grades 10 to 12 as follows:
 - i) Student Information System for specific enrolment;
 - ii) Student Records System / Course Information Database System (CIDS) for course marks;
 - iii) **schools** are required to maintain and retain for a period of 7 years, records of student attendance, final marks, course outlines, detail assessment records for student work in the course and records of course withdrawal for students in Grades 10 to 12.
- c) student information on Form 05AE1.2b for students attending First Nations **schools**.
- d) student information on Form 05AE1.2a for senior high students taking junior high courses.

7. Base instruction funding for a **funded accredited private school** is calculated as follows:
 - a) for Grades 1 to 9, by multiplying the number of **funded students** enrolled on the **count date** by the base Instruction rate; and
 - b) for Grades 10 to 12, by multiplying the completed CEUs by the CEU rate, with a maximum of 60 CEUs per student per school year (Sept. to Aug.).
8. Adjustments to enrolment data:
 - a) if an adjustment is required to the enrolment data reported to the Information Services Branch on September 30, **school authorities** must ensure that changes are made to their modification file; and
 - b) after receiving your January payment details or your first RACERS data, any modification required can be submitted using the “Add, Modify, Delete” form (Form 05AE1.2c) or submitted using the Funding Events System (FES) by the April 30 deadline.
9. Refer to Section 7.7 for additional information on Enrolment Counts and Conflicts.

CONSIDERATIONS

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

FEES AND DEDUCTIONS:1. Access Copyright (formerly Cancopy):

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

2. EduLink:

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

The College of Alberta School Superintendents (CASS) and Association of School Business Officials of Alberta (ASBOA) have agreed their membership will provide the necessary funds to support EduLink for a three-year period – from September 2002 to August 2005. Alberta Education will deduct approximately 35¢ plus GST per **funded student** and **funded child** on behalf of all participating **funded accredited private schools**. This deduction will be made in September and based on the prior year frozen **funded student** and **funded child** count. The deduction will be reflected on the September funding statement. It is up to the individual **funded accredited private schools** to apply for any GST rebate from the Government of Canada.

Alberta Education will forward the maintenance fee of \$195,000 to Edmonton Catholic Schools, the host **board**. This funding will provide for the annual maintenance budget but is not sufficient to pay for significant changes to software.

PURPOSE

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

CONDITIONS

1. Funding is provided for **students with special needs**, who meet Alberta Education special education eligibility criteria, who were enrolled on September 30. Students without special needs attending **DSEPS** with a sibling(s) who has special needs will be funded at the regular **private school** Base Instruction funding rate.
2. Funding is only provided to **DSEPS** that have been approved by the **Minister**. To obtain approval for this status the **private school** must send a request in writing to the Director of Special Programs Branch, Alberta Education, by March 31 for the upcoming school year. The Director will review the request to determine if the operator meets or exceeds Alberta Education standards for special education programming and that students attending the **school** meet eligibility requirements for special education. The status of approved **DSEPS** may be reviewed and withdrawn at any time by Alberta Education.
3. No satellite campuses for existing **DSEPS** will be approved without written consent of the Director of Special Programs Branch. Requests for satellite campuses must be submitted by March 31.
4. a) The **DSEPS** must advise **parents** of the need to discuss their **child's mild or moderate disability** or gifted and talented special needs eligibility and programming options with their **resident board** 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:

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

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

The **resident board** official must retain a record of the discussion to confirm that **parent(s)** did consult with their **resident board**.

One of the following types of documentation must be kept on file at the **DSEPS**:

- a signed registration form at the **DSEPS** which contains a statement declaring that the **parent** consulted with their **resident board**; or
 - a signed letter from the **parent** attesting that they consulted with the **resident board**; or
 - a letter from the **resident board** official confirming that the **parent(s)** consulted with them on their special needs child's programming options.
- b) When a student with a mild or moderate disability or who is gifted and talented is enrolled in a **DSEPS**, and whose **parent** consulted with the **resident board**, instruction funding of \$9,353 per student will be paid directly to the **DSEPS**, with no cost to the **resident board** if enrolment occurs on or before September 30. These students must be coded by the **DSEPS** using the funding Codes 110 and 500 with the applicable special education 50's Code (mild/moderate) or 80 Code (gifted and talented).
- c) If a **parent** enrolls their child with mild or moderate disabilities or a child who is gifted and talented in a **DSEPS** without consulting with the **resident board** on the child's eligibility for special education programming, the **DSEPS** will be eligible for funding of \$5,825 (rather than funding of \$9,353) per student. These students must be coded by the **DSEPS** using the funding Code 500 with the applicable special education 50's Code (mild/moderate) or 80 Code (gifted and talented). The 110 Code cannot be used for these students.
5. For **students with severe disabilities** attending a **DSEPS**, instruction funding of \$5,825 and severe disabilities funding will be provided to the **DSEPS**.
6. The **DSEPS** shall report all students enrolled on September 30 in their **school** to the Information Services Branch by October 5.
7. **DSEPS** must notify **school boards**, in writing, of the **board's resident students** who are registered at the **DSEPS**. This list should indicate:

- which students' **parents** consulted with the **resident board** on the special education programming options for their **funded student** prior to enrolment at the **DSEPS**; and
- which students are newly enrolled; and
- which students currently attending who were enrolled in previous years.

A copy of this notification list must also be sent to the Director of School Finance, Alberta Education by December 15, confirming which of the students' **parents** discussed special education programming and placement options with their **resident board** and which did not. For students whose **parents** consulted their **resident board**, please attach to the notification list a copy of the documentation referred to in Condition #5. This confirmation will determine the basis of Alberta Education's payment to the **DSEPS**.

8. The higher instruction rate will be provided for students with mild/moderate disabilities and students who are gifted and talented whose **parents** placed them in the **DSEPS** prior to September 30, 1998 as long as they are attending the **DSEPS**.
9. For students with a mild or moderate disability or students who are gifted and talented enrolled with a **school jurisdiction** on September 30 who transfer to a **DSEPS** after September 30 in the current school year (or vice versa), funding will no longer be required to be transferred by the **school jurisdiction** or by the **DSEPS** on a pro-rated basis. No pro-rated funding will be provided by Alberta Education to the **DSEPS** for students enrolled after September 30.
10. A **school jurisdiction** that directs a student to a **DSEPS** will pay all program costs that are not covered by funding provided by Alberta Education to the **DSEPS**.

PURPOSE

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

CONDITIONS

- Revised 1. **Funded accredited private schools** will use the severe disabilities categories and codes outlined in the definition of **student with a severe disability** in the Glossary of Terms, and the Handbook for the Identification and Review of Students with Severe Disabilities to determine a student's eligibility and to properly code the child for funding purposes.
- Revised 2. Severe disability funding for **students with a severe disability** attending a **funded accredited private school**, including **Designated Special Education Private Schools (DSEPS)** will be based on September 30 enrolments as reported by the **funded accredited private school** to the Information Services Branch (See Requirement #2). Severe disability funding will be paid directly to the **DSEPS** and **funded accredited private school** for eligible **students with a severe disability**.
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 **funded accredited private 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. Severe disability funding for a **funded accredited private school** is calculated by multiplying the number of eligible **students with a severe disability** by the severe disabilities funding rate.
5. **Funded accredited private schools** providing an approved institutional program may not claim severe disabilities funding for **students with a severe disability** who are funded through **institution** program funding.
6. **Students with a severe disability** enrolled in an **on-line program, blended program** or a home education program are not eligible for severe disabilities funding.
- New 7. **Charter schools** that have eligible **students with a severe disability** must comply with the Conditions and Requirements in this section for funding purposes.

REQUIREMENTS

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

Eligibility and approval of severe disabilities funding will be based on an audit of each student's file. Each information file must contain all of the following:

- a) assessment and diagnosis by qualified personnel (note: a diagnosis alone is not sufficient to qualify for funding);
 - b) documentation/assessments of the student's current level of functioning in the learning environment;
 - c) a current **Individualized Program Plan (IPP)** which addresses the student's diagnosed needs; and
 - d) identification of the types of support and services being provided to the student. Students claimed for this funding must receive three or more of the following types of support:
 - i) a minimum of 0.5 FTE one-on-one instruction/intervention/support (e.g., specialized teacher and/or teacher assistant);
 - ii) specialized equipment or assistive technology;
 - iii) assistance for basic care (e.g., toileting, grooming, catheterization);
 - iv) frequent documented monitoring of medical and/or behaviour status; and
 - v) direct specialized services at cost to the system (e.g., behaviour specialist, orientation and mobility specialist).
2. Eligibility for severe disability funding is based on student registration information, as of September 30, that has been submitted to the Information Services Branch by October 5. **Funded accredited private schools** (including **DSEPS**) must also send the electronic Special Programs Branch Report that lists the students identified with severe disabilities by October 5.
 3. Students who are registered with a **school jurisdiction** on September 30 and are coded as having a severe disability, who then move after September 30 to a **funded accredited private school** (including **DSEPS**), may be claimed for pro-rated severe disabilities funding by the **funded accredited private school**. Pro-rated funding for applicable students may be claimed from Alberta Education using the March 1

enrolment **count date**. Funding will be provided at fifty percent of the rate for **students with a severe disability**.

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

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

Students with a severe disability who were not registered with any **school authority** as of September 30, and who are registered in a **funded accredited private school** after September 30, may also be claimed for pro-rated severe disabilities funding.

Funded accredited private schools should identify these students to the Information Services Branch using the March 1 enrolment **count date** and provide a list of the students and documentation including monitoring forms, assessments, and **IPP** to the Special Programs Branch.

4. For **students with a severe disability** who transfer from a **funded accredited private school** to a **school jurisdiction** after September 30, severe disabilities funding shall be transferred by the **funded accredited private school** to the jurisdiction on a pro-rated basis based on a 10-month program year.
5. For **students with a severe disability** who transfer from a **funded accredited private school** (including **DSEPS**) to a different **funded accredited private school** after September 30, severe disability funding shall be transferred from the first **funded accredited private school** to the second **funded accredited private school** on a pro-rated basis, based on a 10-month program year.
6. For **students with a severe disability** in a **charter school**, who transfer after September 30 to a **funded accredited private school**, (or vice versa), severe disabilities funding must be transferred by the **charter school** to the **funded accredited private school**, (or vice versa), on a pro-rated basis, based on a 10 month program year.

New

REFERENCES

Guide to Education for Students with Special Needs (1997)

Handbook for the Identification and Review of Students with Severe Disabilities

PURPOSE

This funding to **funded accredited private schools** is provided to assist **parents** with the education of their children in the home.

CONDITIONS

1. Funding may be provided to the supervising **funded accredited private school** for **home education students** the **school** has agreed to supervise and provide with learning resources. The education programs for these students must be consistent with the student learning outcomes described in the Alberta Programs of Study or stated in the schedule attached to the *Home Education Regulation*.
2. Additional funding may be provided to **funded accredited private schools** for **home education students** in Grades 7 to 12 enrolled in the Alberta Education Program of Studies through the Alberta Distance Learning Centre (ADLC) or through Distance Learning Consortia operated by public **school authorities** in courses to a maximum of 50 percent of the cost of the registration fees and compulsory learning materials for these courses. The total costs of Alberta Distance Learning (ADL) courses funded by Alberta Education for a **home education student** in a school year will not exceed the home education funding rate. This funding may be claimed on Form 05AE1.4a.
3. Additional funding may be provided to the supervising **funded accredited private school** for **home education students** in Grades 1 to 6 taking a full course load of ADL courses where the total compulsory course costs (net of any applicable refundable deposit) exceed the 50 percent funding provided by the supervising **funded accredited private school** to the home education **parents**. This funding may be claimed on Form 05AE1.4b.
4. Students enrolled in Grades 1 to 9 and participating in a **blended program** and accessing 50 percent or more of their education program at **school** may be claimed as **funded students** by the supervising **funded accredited private school**. However, Alberta Education will prorate the funding based on the percentage of the student's program taken at **school**, and the percentage of the student's program taken at home.
5. Students enrolled in Grades 10 to 12 and participating in a **blended program** and accessing 20 percent or more of their education program at **school** may be claimed as **funded students** by the supervising **funded accredited private school**. However, Alberta Education will prorate the funding based on the percentage of the student's program taken at **school**, and the percentage of the student's program taken at home.

6. In accordance with Section 8 of the *Home Education Regulation*, a supervising **funded accredited private school** shall provide to a **parent** of a student enrolled in a **blended program** an amount of money using the home education rate which is in proportion to the percentage of the program or courses provided by the **parent**.
7. When a student moves from one supervising **funded accredited private school** to another after September 30, and the receiving supervising **funded accredited private school** agrees to purchase ADL courses and related resources from the Learning Resources Centre, Alberta Education will pay for 50 percent of the course costs to a maximum of the home education funding rate for the combined ADL purchases of both supervising **funded accredited private schools**. This funding may be claimed on the applicable form, 05AE1.4a, for Grades 7 to 12 and 05AE1.4b, for Grades 1 to 6.
8. **Home education students** and their **parents** must live in Alberta on September 30 of the current school year.
9. Students enrolled in a home education program are not eligible for severe disabilities funding.

REQUIREMENTS

1. **Parents** are responsible for notifying their supervising **funded accredited private school** of their decision to provide a home education program for their children. **Parents** must fulfill this requirement by submitting all parts of the *Home Education Regulation* Notification Form No. 2 to the supervising **funded accredited private school**. Form No. 2 is available from the supervising **funded accredited private school** or from Alberta Education's Home Education Information Package at: <http://www.education.gov.ab.ca/educationsystem/homeedinfo.pdf>
2. The supervising **funded accredited private school** must annually conduct at least two evaluations of their **home education students'** progress.
3. A supervising **funded accredited private school** must offer annually not less than 50 percent of basic funding for home education to the **parents** of **home education students** for the purchase of Programs of Study and instructional materials.
4. Home Education funding is based on:
 - a) student registration information in Grades 1 to 12 as of September 30 that is reported to the Information Services Branch by October 5;
 - b) report of ADLC courses for home education students on Form 05AE1.4a; and
 - c) report of additional ADL course costs for Grades 1 to 6 on Form 05AE1.4b.

5. Home education funding for a supervising **funded accredited private school** is calculated by:
- multiplying the number of **home education students** in Grades 1 to 12 on the September 30 **count date** by the home education rates;
 - adding 50 percent of compulsory ADL course costs for students enrolled in Grades 7 to 12, as paid for by the supervising **funded accredited private school**, not exceeding the home education funding rate;
 - adding the compulsory course costs for **home education students** in Grades 1 to 6 which exceed the 50 percent funding provided by the supervising **funded accredited private school** to home education **parents**.
6. Funding for a supervising **funded accredited private school** for each student enrolled in a **blended program** on the September 30 **count date** is the sum of the calculations in (a) and (b) as follows:
- multiply the percentage of the student's **school** provided portion by the base instruction funding rate for supervising **funded accredited private schools**; plus
 - multiply the percentage of the student's home education portion by the home education rate including 50 percent of the ADL course costs to the pro-rated portion of the maximum.

Example 1:

A student in a home education program 40 percent of the time, using ADL courses and in a regular **school** program 60 percent of the time would be funded as follows:

Home Education rate	40%	X	\$1,272	=	\$508.80
Plus ADL course costs to a maximum of 40 percent of the home education rate	40%	X	\$1,272	=	\$508.80
Plus the Regular school rate (for applicable grade)	60%	X	\$3,052	=	<u>\$1,831.20</u>
Total					<u>\$2,848.80</u>

Example 2:

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

Home Education rate	70%	X	\$1,272	=	\$890.40
Regular School rate (for applicable grade)	30%	X	\$3,052	=	<u>\$915.60</u>
Total					<u>\$1,806.00</u>

CONSIDERATIONS

1. **Funded accredited private schools** shall have home education policies in place that indicate which Programs of Study and instructional materials will be considered for reimbursement and the amount of reimbursement for students in **blended programs**.

REFERENCES

Home Education Policy 1.1.2

Home Education Regulation AR 126/99

PURPOSE

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

CONDITIONS

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

REQUIREMENTS

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

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

NEW

PURPOSE

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

CONDITIONS

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

REQUIREMENTS

1. School information for funded students enrolled as of September 30 must be submitted to the Information Services Branch by October 5.
2. **Funded accredited private schools** are not required to apply for funding under this section. The School Finance Branch will determine the funding allocation for each **funded accredited private school**.

PURPOSE

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

CONDITIONS

1. Under an agreement between the Governments of Canada and Alberta, and according to Section 10(1) of the *School Act*, **francophone regional authorities** may receive federal funds for providing a **French First Language (Francophone) Education** for **funded students** in Grades 1 to 12 and **funded children** in **ECS programs**.
2. **Francophone regional authorities** may also include as **funded students** under this section:
 - a) a **funded student** they have directed to attend College Mathieu in Gravelbourg, Saskatchewan; or
 - b) a student who attends another **school jurisdiction** with which the **francophone regional authority** has entered into an **educational services agreement** as per Section 62 of the *School Act*. When registering these students, the providing **school authority** must register the students using Code 145, and enter the authority code for the directing **francophone regional authority** in the “**Resident Board**” field. The **francophone regional authority** does not register the students.
 - c) an individual who is a **First Nations student with status who resides on a reserve** is not eligible to be counted for funding under this section.

REQUIREMENTS

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

CONSIDERATIONS

1. This funding for **francophone regional authorities** is based on **funded student** enrolments as of September 30 (reported to Information Services by October 5) and the hours of French instruction for the school year (including both semesters for Grades 10 to 12) for the reported students. The funding amount is calculated by multiplying the number of eligible FTE students by the per **funded student** rate provided in Consideration #4.

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

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

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

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

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

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

ECS to Grade 9

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

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

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

PURPOSE

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

CONDITIONS

1. Under an agreement between the Governments of Canada and Alberta, **school authorities** may receive federal funds for providing instruction in French for **funded students** in Grades 1 to 12 and **funded children** in **ECS programs**. The categories of instruction involving French which are funded as follows:
 - a) **Alternative French Language Programs** (French programs offered under Section 11(1) and 21(1)(a) of the *School Act*, including French Immersion); and
 - b) **French as a Second Language (FSL)** courses (French programs offered under Section 39 of the *School Act*).
2. An individual who is a **First Nations student with status who resides on a reserve** is not eligible to be counted for funding under this section.

REQUIREMENTS

1. **School authorities** must ensure that students in an **Alternative French Language Program** (such as French Immersion), which provides the minimum instructional hours in French outlined in Consideration #2, are coded using Code 211.
2. **School authorities** must ensure that students taking **FSL courses**, or students in **Alternative French Language Programs** that do not meet the minimum instructional hours in French as outlined in Consideration #2, are coded using Code 230.
3. A **school authority** offering an **Alternative French Language Program** may, by resolution, authorize the commencement of an **Alternative French Language Program** in a **school** and upon passing the resolution shall inform the **Minister** in writing.

4. A **school authority** must develop, keep current and implement written policies and procedures consistent with provincial policies and procedures for:
- a) **Alternative French Language Programs** (such as French Immersion); and
 - b) **FSL courses**.

CONSIDERATIONS

1. Federal French Language funding is based on French program student enrolments as of September 30 (reported to the Information Services Branch by October 5) and the hours of instruction in French for the school year (including both semesters for Grades 10 to 12) for the reported students. The funding amount is calculated by multiplying the number of eligible FTE students by the per FTE **funded student** rate provided in Consideration #5.

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

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

2. **Alternative French Language Programs** such as French Immersion should provide the following minimum number of student instructional hours in French per year:

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

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

SECTION 4.2 FEDERAL FRENCH LANGUAGE FUNDING

If a student in an **Alternative French Language Program** receives less than the minimum hours of instruction in French specified above, the student will be funded according to the formula for **FSL** (see Consideration #4).

3. **FSL courses** should fall within the following range of student instructional hours in **Revised French** per year:

ECS to Grade 3	40 to 474 hours per student/year
Grades 4 to 6	95 to 474 hours per student/year
Grades 7 to 9	95 to 379 hours per student/year
* Grades 10 to 12	125 to 250 hours per student/year

- * **Schools** will indicate 250 hours for students who take two 5-credit **FSL courses** in one year.

4. **Funded students** and **funded children** enrolled in a **FSL** course, or in an **Alternative French Language Program** with less than the minimum hours of instruction in French specified in Considerations #2 and #3, will be funded as follows:

ECS to Grade 9

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

Funding Rate per FTE Funded Student	X	$\frac{\text{Instructional hours per year}}{1000 \text{ Hours}}$	X	Number of Funded Students in the program
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SECTION 4.2 FEDERAL FRENCH LANGUAGE FUNDING

5. The following grant rates for 2005-2006 are provided as estimates for planning purposes only. Final grant rates will be confirmed once all enrolments for 2005-2006 are compiled.

PROGRAM	RATE
Alternative French Language Program ECS to Grade 6	\$105 per FTE
Alternative French Language Program Grade 7 to 12	\$180 per FTE
FSL courses ECS to Grade 6/other courses*	\$65 per FTE
FSL courses Grade 7 to 12/other courses*	\$90 per FTE

- * This funding rate also applies for students and children taking courses in an **Alternative French Language Program** who receive less than the minimum number of instructional hours in French per year as per Considerations # 2 and #4.

REFERENCES

Policy, Regulations and Forms Manual

French as a Second Language and French Immersion Policy 1.5.2

PURPOSE

This inter-ministerial funding is provided to Student Health Partnerships to improve access to and enhance the provision of integrated health and related support services for **school** children with special health needs so that they can participate fully in their education programs to attain their potential and be successful at learning.

CONDITIONS

1. Students with special health needs include students with physical disabilities, development disabilities, neurological disorders, sensory impairments, medical conditions, and/or emotional/behavioural disabilities who are registered in **school** programs from **Early Childhood Services (ECS)** through Grade 12. Services eligible for funding include speech-language therapy, physical therapy, occupational therapy, audiology, respiratory therapy, clinical nursing, and emotional/behavioural supports.
2. Student Health Initiative (SHI) funding is accessed by Student Health Partnerships consisting of **school authorities**, Regional Health Authorities, and Child and Family Services Authorities, which collectively set priorities, develop collaborative strategies for delivering services and share accountability for results.
3. Alberta Education administers SHI funding on behalf of the following provincial government partners – Alberta Education, Alberta Health and Wellness, and Alberta Children's Services.
4. SHI funding must be pooled and shared by the Student Health Partnership to provide students with identified special health needs with access to student health services. Students throughout the region must have equitable access to services regardless of their **school** program.
5. The SHI funding allocation may only be accessed if, and when, the **school authority** joins a Student Health Partnership, and a Service Plan is submitted that is signed by the Chair of the Partnership on behalf of all the required partners. The Partnership must include the regional health authority, the child and family services authority and at least one **school board**.
6. Decisions on how the SHI funding is to be utilized must be made jointly by the partners in the Student Health Partnership.

7. Alberta Education distributes SHI funding for Student Health Partnerships through the “banker” **school board** designated by the Partnership to administer the Student Health Initiative funds on behalf of all partners.

REQUIREMENTS

1. Every school year, Student Health Partnerships must submit a Service Plan for approval. The service plan for the 2005-2006 school year with all required documents must be submitted by May 15, 2005.
2. Student Health Partnerships must submit an Annual Report for the previous school year, with all required components and documents, by November 30 of the current school year.
3. Student Health Partnerships must designate a **school board** as a “banker” through which they will receive and distribute their funding. Student Health Partnerships are required to identify in their annual service plan who they have designated as their “banker” **school board** and of any changes to this designation.

CONSIDERATIONS

1. The allocation of the SHI funding to the Partnership is based on a funding distribution formula: that estimates the number of students within the participating **school authorities** who require student health services by combining the numbers of **students with disabilities** with a portion of the general student population who may require student health services; and that address the effect of the factors of **distance** and socio-economic status on the region.

Base Funding: 30% of the provincial funding provides a base level of funding to each Partnership based on its proportion of the total provincial ECS to Grade 12 **funded child/student** enrolment, based on Alberta Education total **funded child/student** enrolment data.

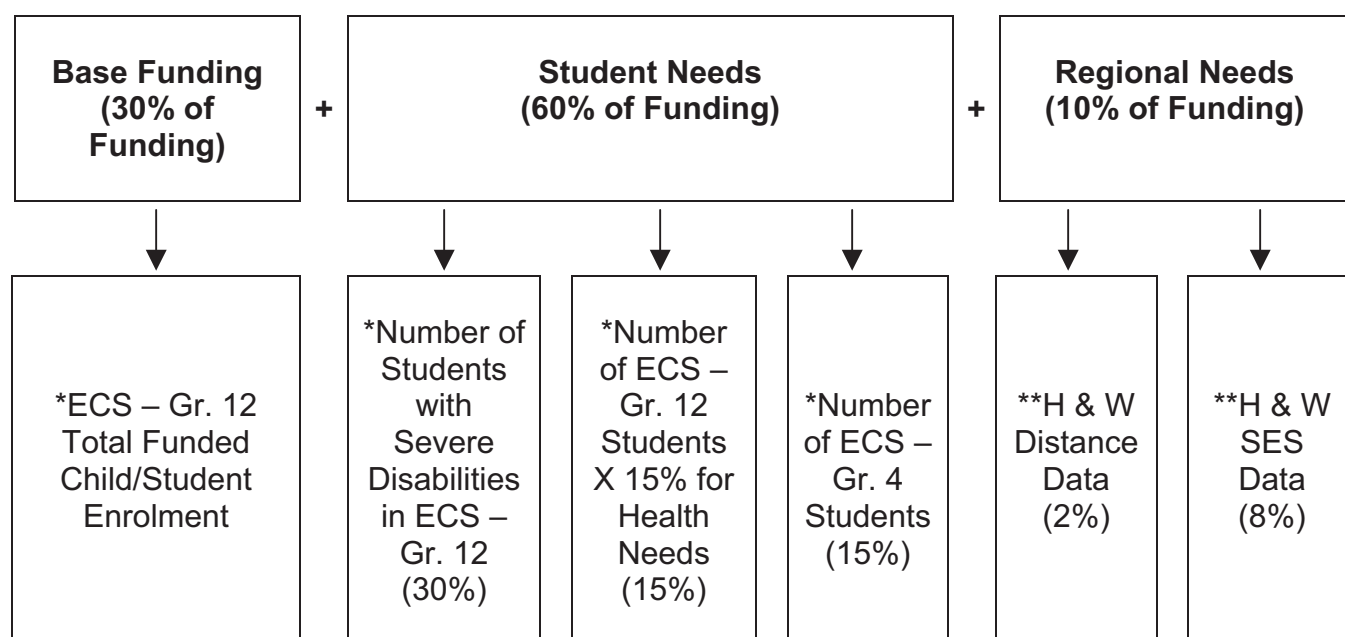
Student Need: 60% of the provincial funding provides additional funding to each Partnership based on:

- 30% towards each Partnership’s proportion of the total provincial number of ECS to Grade 12 **students with severe disabilities**. Alberta Education maintains **school jurisdiction** profiles (Grades 1 to 12) that include data on **students with severe disabilities**.
- 15% toward each Partnership’s total student population who potentially require student health services (15%) based on Alberta Education ECS to Grade 12 student enrolment data.
- 15% toward each Partnership’s proportion of the total provincial number of students in Early Childhood Services to Grade 4 to give emphasis to early intervention, based on Alberta Education data on student enrolment by grade.

Regional Need: 10% of the provincial funding provides additional funding to each Partnership based on:

- 2% of the total provincial funding allocation distributed towards each Partnership's distance needs based on a formula that considers children's **distance** from services. (Data provided by Alberta Health and Wellness.)
- 8% of the total provincial funding allocation distributed towards each Partnerships' socio-economic needs based on a formula that considers the socio-economic factors of children in the region. (Data provided by Alberta Health and Wellness.)

STUDENT HEALTH INITIATIVE FORMULA



*Alberta Education data as of September 30th; based on data for ages 2 ½ to 20 years of age.

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

The total for the Partnerships is the sum of the Partnership's proportion of the provincial allocations towards each of: base funding, **students with severe disabilities**, students who potentially require student health services, students in ECS to Grade 4 distance factors and socio-economic factors. This sum is the SHI allocation provided to the Partnership of which the **school authorities** are partners.

Commencing with the 2004-2005 Service Plan year, the above model was implemented. The partners in the Student Health Partnership will continue to decide how the pooled funding will be shared and utilized based on identified student health needs and priorities.

2. **Funded students** who are registered with **school authorities** in alternative programs such as home education/**blended**, **outreach** and **online** are counted in the SHI funding allocation through the **school authority** where they are registered. The SHI funds are provided to the SHI Partnership to which that authority belongs. Each Student Health Partnership is responsible for the student health needs of any student registered with its **school authority** partners who live in another region of Alberta.
3. Funding for administration costs is included in the allocation.

Requirements are outlined in the Student Health Partnership Service Plan Guidelines for 2005/2006 and the Student Health Partnership Annual Report Guidelines for 2005/2006 (available at <www.gov.ab.ca/studenthealth>).

PURPOSE

This funding is provided to **school authorities**, in addition to Base Instruction funding, for specific local initiatives to improve student education and performance.

CONDITIONS

1. Funding is provided for projects and project budgets that have been approved by Alberta Education. Therefore the funding provided is the total of all the approved project budgets.
2. The amount in Condition #1 is subject to a maximum funding level, which is calculated by multiplying the applicable rate per student/child by the September 30 student count of the previous school year for registered students in Grades 1 to 12 and registered ECS children.

Alberta Education will approve multi-year projects. Funding for future years will be based upon demonstrated evidence of success as collaboratively decided by Alberta Education and the **school authority**. If funding is not continued for a project, the **school authority** may submit a new project proposal to Alberta Education for the same or a lesser amount of funding.

3. Heritage Language Schools are not eligible for funding under this section.

REQUIREMENTS

1. **School authorities** develop **school** improvement project proposals based on identified student needs, which reflect unique local needs and circumstances. A project proposal must be submitted to the School Improvement Branch for approval using the project application form found on the Alberta Education Extranet.
2. **School authorities** have a high degree of autonomy and flexibility in designing **school** improvement projects and in allocating funding. The following conditions must be met for project approval:
 - a) the project plan must provide for sufficient professional development and administrative support;
 - b) funding may not be used for payment of bonuses or other types of incentives; and
 - c) funding may not be allocated on a per-student basis to **schools**.

3. **School authorities** must provide Alberta Initiative for School Improvement (AISI) reporting information according to the following timelines:
 - **October 15** – AISI Project Annual Report (APAR); AISI Project Final Report (APFR) in the final year of the project.
 - **November 30** – Annual Education Results Report includes a summary of the AISI projects.
4. Unexpended AISI funds at the end of the AISI project may be transferred to another AISI project, whether existing or new.

CONSIDERATIONS

1. Funding for projects approved prior to September 1 will commence in September of the school year and will be based on the same payment schedule as Base Instruction payments.
2. Funding for projects approved after September 1 will commence in the month following approval and may include “retroactive” funding, if that was part of the project approval.
3. **School authorities** may transfer funding among their project budgets as long as they remain within their total approved allocation.

REFERENCES

Framework for the Alberta Initiative for School Improvement, 1999

Alberta Initiative for School Improvement Administration Handbook

Alberta Initiative for School Improvement website at www.education.gov.ab.ca/sib/aisi

PURPOSE

This funding provides basic high-speed network connectivity opportunities for **school authorities**.

CONDITIONS

1. **School authorities** will receive High Speed Networking Access funding for each approved site that is connected to and using the SuperNet services obtained through the SuperNet vendor, Axia SuperNet Ltd.

REQUIREMENTS

1. **School authorities** must sign a contract with High Speed Networking vendor for all High Speed Networking connected sites.
2. **School authorities** must apply for High Speed Networking Access funding by submitting a High Speed Networking Access funding application (Form 05AE5.3) to Alberta Education's Stakeholder Technology Branch (STB) and a copy of the contract as soon as possible after the sites are connected to high speed network services.
3. **School authorities** must provide notification to STB of any proposed changes, including additions and/or deletions to the list of connected sites and the connection or disconnection dates for each site.

CONSIDERATIONS

1. High Speed Networking Access 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 high speed network access rate.
2. High Speed Networking Access funding for **school jurisdictions** is provided for 100 percent of the monthly service cost to a maximum of \$503.50 per month for each approved site. **Funded accredited private schools** will be funded for 60% of the monthly service cost to a maximum of \$302.10 for each approved site. **Private ECS operators** will be funded for 50% of the monthly service cost to a maximum of \$251.75 for each approved site. If the connection date is other than the 1st of the

month, the payment for that month will be pro-rated according to the connection date.

3. ELIGIBLE SITES:

- a) Eligible sites include **school authority** central offices, **schools**, and network operation centres.
- b) Alberta Education will consider special circumstances for inclusion as an eligible site on a case-by-case consultation with the High Speed Networking consortium. The STB may be contacted for more information.

ADDITIONAL INFORMATION

1. NETWORK HEAD-END AGGREGATION PROVISION

The aggregation of many SuperNet-connected **schools** back to a single network “head-end” location in larger public ECS – Grade 12 **school authorities** will create a significant bottleneck for network traffic.

As a result, Alberta Education will provide additional High Speed Networking funding to a public **school jurisdiction** network head-end location based on the following formula: Head End SAF = \$503.50 x (jurisdiction student population/Average number of students per public jurisdiction provincially at June 30, 2005).

2. MULTIPLE STAKEHOLDER SHARED FACILITY AGREEMENTS

When different education stakeholders are sharing the same facility and each have their own local-area network infrastructure, they are eligible to have one stakeholder (transferring stakeholder) transfer their High Speed Networking 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 High Speed Networking 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 High Speed Networking Funds paid to the receiving stakeholder must not exceed the total monthly contracted value of SuperNet services to that stakeholder by Axia SuperNet Ltd.

3. EXISTING HIGH-SPEED NETWORKING INFRASTRUCTURE PROVISION

Some **school authorities** already own and operate their own fibre-optic high-speed network connections between eligible SuperNet connectable sites. In this case they can claim High Speed Networking funding for these sites without an Axia SuperNet Ltd. contract for those sites given the following procedures and considerations:

- a) This addendum applies to sites with qualifying network infrastructure installed prior to the initial SuperNet rollout only.
- b) At least one site on the **school authority** owned network infrastructure must connect to SuperNet using an Axia SuperNet Ltd. contracted service.
- c) The total amount of monthly High Speed Networking 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 High Speed Networking funding paid to the **school authority** exceed the total monthly contracted value of SuperNet services to them by Axia SuperNet Ltd.
- d) The **school authority** owned infrastructure used to connect the sites together must be single mode fibre equal to or better than that used by the SuperNet build (contact STB for details). Proof of the fibre used must be provided to the STB (installation invoice, purchase invoice, or third-party engineering validation).

PURPOSE

This funding enables **school jurisdictions** to hire additional teachers in order to lower class size averages to those recommended by Alberta's Commission on Learning (ACOL), over a three (3) year period.

CONDITIONS

1. Jurisdiction specific funding allocations were provided to each jurisdiction in July 2004. The September 2003 class size survey information that was provided by **school jurisdictions** was used as the base for calculating the funding allocation.
2. The funding allocations for three years (2004/2005 to 2006/2007) were calculated based on the higher of:
 - A jurisdiction's 2003/2004 class size average; or
 - A combination of per student funding and the jurisdiction's 2003/2004 class size average.
3. The 2003/2004 **frozen funded student count** (ECS count at 0.5 FTE) was used for the per student portion of the calculation.
4. Based on this data, **school jurisdictions** will receive funding allocations over the three year period to achieve the ACOL guidelines in the third year (2006/2007).
5. Funding in this manner ensures that all **school boards**, including those who have already met the ACOL guidelines, will receive funding.
6. Total teacher costs of \$65,800 were used to determine funding allocations.
7. The funding for 2005-2006 has been increased by 5.5% to ensure that teachers hired in 2004-2005 under this initiative are retained.

New

REQUIREMENTS

1. For those jurisdictions that have already met the ACOL guidelines or are unable to hire teachers due to factors beyond their control, these funds can be used, with the prior approval of the **Minister**, for classroom/student supports. Under no circumstances can this funding be used to increase salary/benefit levels of jurisdiction staff, other than a provision for grid movement.

2. A three year phase-in will allow jurisdictions the necessary time to align their class size averages to the ACOL guidelines. It is expected that by 2006/2007, all jurisdictions will be at the ACOL guidelines.

Grades	Phased-In Averages *			Commission Guidelines *
	2004/2005	2005/2006	2006/2007	
K-3	20.0	18.5	17.0	17.0
4-6	25.0	24.0	23.0	23.0
7-9	27.0	26.0	25.0	25.0
10-12	29.0	28.0	27.0	27.0

*Includes Special Education classes.

3. Some jurisdictions are already at or below some or all of the targets; however, the goal is for every jurisdiction across the province to reach the ACOL guidelines in all grade categories as quickly as possible.
4. 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 at the jurisdiction level.
5. **School jurisdictions** are required to post on their Web site by January 15, jurisdiction and **school** average class sizes for the current year by grade category (K-3, 4-6, 7-9, 10-12). They will be accountable for explaining whether or not the guidelines have been met by the 2006-2007 school year.

Revised

PURPOSE

Revised This inter-ministerial funding is provided to:

- support the creation and operation of a regional integrated case management system to better coordinate the diverse range of programs and services required by children and youth with complex needs as identified in the *Policy Framework*.
- provide specialized services for children and youth with complex needs who require significant extraordinary care due to the severity of their impairment(s) so that they can attain their potential, participate fully in their education programs and be successful at learning.

CONDITIONS

- Revised**
1. This funding is provided to Regional Integrated Case Management Teams, who then determine on an individual case-by-case basis the amount of funding to be provided for each eligible child or youth. The following terms must be met for the Team to consider providing funding:
 - a) The child or youth:
 - is less than 20 years of age as of September 1 (there is no minimum age), and
 - has one or more disabling conditions that severely impairs his/her ability to participate in daily activities at home, in **school** and in the community, and
 - requires extraordinary care and services from more than one ministry or service sector, and
 - requires a high degree of service coordination because of the complexity of the variety and intensity of services required.
 - b) The local programs and services:
 - cannot provide the extraordinary combination and level of services the child requires or
 - do not have sufficient resources to provide the combination and level of services the child requires or
 - are prevented by mandate/policy from providing the combination and level of services the child requires.

- c) The local case managers, service providers and family/guardian:
- have met to develop an integrated service plan, and
 - have determined that all local resources have been exhausted, and
 - have determined that an adequate service plan cannot be developed locally, and
 - have determined that without an adequate service plan the child, youth, family or public will be at risk, and
 - agree that the child/youth should be referred for a Regional Integrated Case Management Team Review, and
 - have determined that the child/youth has a guardian who is willing to participate in a review and in the development of an adequate integrated service plan.
2. Children and Youth with Complex Needs funding is accessed by Regional Integrated Case Management Teams consisting of **school authorities**, regional health authorities, child and family services authorities, **parents** and other partners. The Team must collaboratively provide integrated case management for the child or youth with complex needs and they must develop integrated service plans and share accountability for results.
3. The Children and Youth with Complex Needs funding allocation may only be accessed if, and when, the **school authority**, regional health authority and child and family services authority join a Regional Integrated Case Management Team, and a Terms of Reference has been submitted that has been signed by all the required partners of the Regional Integrated Case Management Team. The Terms of Reference must include roles and responsibilities for decisions regarding the use of the funding. (See Requirement 2.)
4. Decisions on how the Children and Youth with Complex Needs funding is to be utilized must be made jointly by the partners of the Regional Integrated Case Management Team. Children and Youth with Complex needs funding must be pooled and shared by the Regional Integrated Case Management Team for operation and service delivery to provide children and youth with access to services. Children and youth with complex needs throughout the region must have equitable access to services.
5. Alberta Education administers Children and Youth with Complex Needs funding on behalf of the following provincial government partners - Alberta Education, Alberta Children's Services, and Alberta Health and Wellness, including the Alberta Mental Health Board.
6. Alberta Education distributes Children and Youth with Complex Needs funding for Regional Integrated Case Management Teams through the "banker" school authority.

REQUIREMENTS

1. All other sources of funding for service delivery must be exhausted prior to accessing the Children and Youth with Complex Needs funding.
2. Regional Integrated Case Management Teams must submit, for approval, a Terms of Reference for the school year with all required documents, by May 15 of the previous school year.
3. Regional Integrated Case Management Teams must submit an Annual Report for the previous school year, with all required documents, by November 30 of the next school year.
4. Regional Integrated Case Management Teams must designate a **school authority** as a "banker" through which they will receive and distribute their funding. Regional Integrated Case Management Teams are required to identify in their Terms of Reference who they have designated as their "banker" school authority and any changes to this designation.

CONSIDERATIONS

1. Funding for Children and Youth with Complex Needs is comprised of two components:

- Revised a)** Operational Funding
Each Regional Integrated Case Management Team receives a base amount (\$70,000) of funding for implementation of the team including a regional support coordinator.
- b) Service Delivery Funding
Service delivery funding is provided to each of the Regional Integrated Case Management Teams based on the region's portion of the total provincial service delivery funding.

The allocation of the service delivery funding for each Regional Integrated Case Management Team is based on the region's average percentage. This average percentage is the calculated average of the three percentages outlined below:

- The region's percentage of the total provincial population of children and youth age 0 to 19. Data is provided by Health and Wellness.
- The region's percentage of the total provincial number of Early Childhood Services to Grade 12 **students with severe disabilities** enrolled in school programs. Data is provided by Alberta Education.
- The region's percentage of the total provincial number of children and youth receiving services under Resources for Children with Disabilities. Data is provided by Children's Services.

The region's average percentage is then multiplied by the total provincial service delivery funding to determine the Children and Youth with Complex Needs funding allocation that will be provided to the Regional Integrated Case Management Team.

2. Annual reviews of the allocated funding will be conducted to review what regions have spent and to look at equity across regions. Allocations will be confirmed and adjusted in the subsequent year if necessary.

REFERENCES

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

Management of Integrated Services for Children and Youth with Complex Needs and Their Families: Guidelines for Alberta Regional Teams. (Available at www.child.gov.ab.ca)

PURPOSE

This funding provides for education programs for **resident students of the government** placed in **institutions** such as hospitals, young offender centres, treatment centres, youth assessment centres and **group homes**.

CONDITIONS

INSTITUTIONAL PROGRAMS

1. **School jurisdictions and funded accredited private schools** authorized to provide an education program in an **institution** operated or approved by the Government of Alberta may qualify for institutional program funding. Funding is provided for educational programs for **resident students of the government** who reside in an **institution** or a **group home** approved by the **Minister** of Education. Eligible **resident students of the government** are those who:
 - a) are in custody under the *Corrections Act*, the *Corrections and Conditional Release Act* (Canada), the *Youth Criminal Justice Act* (Canada) or the *Youth Justice Act*, or
 - b) are **in the custody of a director** of Child Welfare, or have a guardian appointed under the *Child, Youth and Family Enhancement Act*; or
 - c) are in long term medical care; or
 - d) are a temporary resident of a women's shelter and require protection from physical, psychological or sexual abuse (for funding purposes under this section, these students are considered **resident students of the government**).

Updated

These **resident students of the government** have been placed in the **institution** because they require care and protection, or they pose a danger to themselves or others, or they require extensive treatment and therapy.

2. **School jurisdictions and funded accredited private schools** must have approval from the **Minister** and a contract/agreement with Alberta Education to provide an educational program to students in the **institution**. Application for program approval should be submitted to the Director of the Special Programs Branch of Alberta Education.

3. Institutional funding will only be provided for **eligible resident students of the government** who:
 - a) reside in the **institution**; and
 - b) must receive their education program in the **institution** because they are not able to attend a local community **school** or the local community **school** cannot provide an appropriate program.

Alberta Education will not provide funding to cover the education program costs for non-eligible students attending institutional programs as outlined above (e.g., students who do not reside in the **institution** and/or who are not **resident students of the government**). These would include day students, students placed by the **school authority** providing the institutional program, tuition students from another **school jurisdiction**, or tuition students from out-of-province.

4. **Students with severe disabilities** who reside in an **institution** will be funded through Institutional Program funding and are not eligible for Severe Disabilities funding.
5. Only **group homes** with treatment program/facilities are eligible for funding under this category.
6. Institutional programs will only be funded for a 10-month/regular school year program. Only Young Offender Centre's will be funded for a 12-month program.

REQUIREMENTS

INSTITUTIONAL PROGRAMS

School jurisdictions and **funded accredited private schools** with a contract or approval to provide an education program in an **institution** are required to:

1. Ensure all eligible institutional students are registered with the grant program under Code 550.
2. Submit a budget of reasonable and eligible costs using Form 05AE6.1 to the Special Programs Branch by April 28 for the following school year. See Requirement #10 for further instructions.
3. Submit a letter for approval to the Special Programs Branch explaining the need for additional funds when requesting a significant change to an approved budget.

4. Submit a statement of actual program costs and revenues using Form 05AE6.1 to School Finance Branch by October 14 of the following school year. Funding will be based on the net actual cost of providing the program for costs approved on the budget. See Requirement #10 for further instructions. The Special Programs Branch may request explanation for cost categories where actual costs significantly exceed approved budget amount for that category.
5. Keep daily attendance records for all students.
6. Submit annually an Institutional School Profile Report form for the previous school year to the Special Programs Branch by October 14.
7. Ensure that the program provided in the **institution** is comparable quality to other **school** programs provided by the **school jurisdiction** or **funded accredited private school**. The **institution's** educational program shall be considered an integral part of the **school jurisdiction** or **funded accredited private school** and subject to the same level of planning, evaluating and reporting required by provincial and local policy.
8. Submit a written proposal for approval of new institutional programs. The proposal should provide a description of the program and a budget that outlines the financial needs to support delivery of the program. The proposal should be sent to the Director of the Special Programs Branch by May 1 of the school year preceding the school year for which approval is being requested.
9. Maintain the confidentiality of students in Women's Shelter programs by withholding the students' names and Alberta Student Numbers when submitting final costs for the programs. However, **school jurisdictions** and **funded accredited private schools** should claim Base Instruction funding for these students and report this revenue on budget and final cost forms.
10. **Instructions for Completion of 2005-2006 Institutional Funding Applications**

Important: There are two categories of institutional programs – Regular and Mixed programs. Regular institutional programs only have eligible **resident students of the government** (e.g. students who were placed in the **institution** by a government agency and they reside in the **institution**). Programs of this type should complete the Regular Institutional Program form.

Mixed institutional programs have both eligible **resident students of the government** and non-eligible students. Non-eligible students are students who were not placed by a government agency and do not reside in the **institution** (e.g. day students, students placed by the **school jurisdiction**, tuition students from another **school jurisdiction** or tuition students from out-of-province). Programs of this type should complete the Mixed Institutional Program form.

Instructional Salary Costs

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

Supplies and Services Costs

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

Note: Counseling, therapy or psychiatric services are not to be included in this category as these are the responsibility of the government agency operating the **institution**.

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

Note: Office capital equipment such as audio-visual equipment, copiers, staff computers, furniture, fixtures for the classroom or office are not to be included in this category as these costs are the responsibility of the government agency operating the **institution**.

Technology Costs

Computers and computer upgrades, peripherals (printers for instructional use, peripherals for special needs students), technical support, and software for teacher and student use that supports the learner outcomes identified by Alberta Education.

Technology costs will be calculated using the lesser of the following amounts:

- a) Actual costs, or
 - i) For regular institutional programs that have only institutional students, \$500 x the daily average number of students (line D of the budget form), or

- ii) For mixed programs (e.g. programs with institutional students and non-institutional students), \$500 x the daily average number of institutional students (line E of the budget form), or
- b) Maximum of \$10,000 total per year. Requests over the maximum amount require prior approval from the Education Manager for **institutions** at the Special Programs Branch.

Revenues:

Please list the Base Instruction revenues you received (or plan to receive) for the eligible **resident students of the government** who were enrolled on September 30 (note: these students should be coded as 550 in order to receive funding). List other funding you received for eligible **resident students of the government** in the program, but do not include the Institutional funding payments you received. For Mixed Institutional programs, please ensure that the revenues reported are only for eligible institutional students. Revenues for non-eligible students should not be included.

Average Number of Students Enrolled:

To calculate the average number of students enrolled:

- Step 1: Determine the number of students enrolled for each month that the program operated. Note: students who are enrolled for more than one month will be counted for each month attended (e.g. if a student attends the program for 3 months, then the student would be counted for each of the 3 months attended.) For 2005-2006 Budgets, please use monthly enrolments from the 2004-2005 school year. For 2005-2006 Finals, please use monthly enrolments for the 2005-2006 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.

PURPOSE

This funding is provided to designated **school jurisdictions** to provide **school authorities** with access to subsidized educational specialized services for children and students with special education needs.

CONDITIONS

1. **School authorities** may access Regional Educational Consulting Services (RECS) for **funded students** and **funded children** assessed and identified by the **school authority** as meeting the criteria for one of the following Alberta Education exceptional student codes and requiring the support of a multidisciplinary educational support team:

Code 41 – Severe Cognitive Disability

Code 43 – Severe Multiple Disability

Code 44 – Severe Physical/Medical Disability

Code 45 – Deafness

Code 46 – Blindness

Code 55 – Hearing Disability

Code 56 – Visual Disability

Revised RECS are not available for Early Childhood Services (ECS) children with a Severe Delay Involving Language (Code 47).

2. Francophone **school authorities** may access “Le Réseau provincial d’adaptation scolaire” for **funded students** meeting the criteria for any special needs code/category.
3. Alberta Education will determine the funding allocation for each program based on provincial and regional needs.

REQUIREMENTS

1. The **school jurisdiction** designated by Alberta Education to provide regional consulting services will use RECS to provide the following services to eligible students referred by **school authorities**.
 - a) Consultation

Provide support to **schools** by teaming collaboratively to develop educational program recommendations, to make suggestions for curricular modifications, to recommend materials, to identify equipment needs, assistive technology, or environmental modifications and to model teaching strategies.
 - b) In-Service

A wide range of in-service and staff development activities are available to teachers, paraprofessionals, administrators, professional colleagues and **parents**. Given the varied experience and expertise of the consultants, workshops may be tailored to the specific needs of the group.
 - c) Assessment

This process includes identification of an individual's specific educational needs to assist **school** staff to design and implement effective programming for the student.
2. A rate of \$45 per hour will be charged for services provided to **school authorities** during the 2005-2006 school year. **School authorities** are responsible for prioritizing their need for regional consulting services.
3. The funding allocation is comprised of two components: The Base Operating Funding is on-going permanent funding for which long-term decisions may be made. The Provincial Initiatives Funding is not permanent and may be adjusted as provincial priorities change. No long-term decisions should be made for this funding component. **School jurisdictions** designated to provide regional educational consulting services will be informed by letter from the School Finance Branch by April 30 of their funding allocation from Alberta Education for the next school year.
4. The **school jurisdictions** designated to provide regional educational consulting services will submit a budget (Form 05AE6.2) to the Special Programs Branch by May 31, indicating projected expenditures and revenues for the assessment consultation services for the upcoming school year. **School jurisdictions** will be allowed to retain any surpluses to help offset future expenses or deficits. The budgeted expenditures shall not exceed the total revenues projected, including any surplus funds from previous years. Alberta Education will not fund any deficits.

5. The designated **school jurisdictions** will provide, to the School Finance Branch, an audited financial statement that identifies the revenues and expenditures associated with the provision of services on or before November 30 of each year for the previous school year.
6. The designated **school jurisdictions** will provide an annual results report to the Special Programs Branch by November 30 for the previous school year.

CONSIDERATIONS

1. Administration funding is included in the allocation.
2. The **school jurisdictions** designated by Alberta Education to provide regional assessment services are:
 - a) Grande Prairie School District #2357
 - b) Edmonton School District #7
 - c) Calgary School District #19
 - d) Greater North Central Francophone Education Region No. 2 (for **Francophone Authorities** only) – Le Réseau provincial d'adaptation scolaire
3. For referral information in the following zones, contact:

Updated	ZONE 1	C.A.S.E. (Coordinated Assessment Services for the Exceptional) Crystal Park School 9315 – 116 Avenue Grande Prairie, Alberta T8V 6L5 Phone: (780) 539-0333 Fax: (780) 539-7613 E-mail: mkay@gppsd.ab.ca
	ZONES 2, 3 and 4	Edmonton Regional Educational Consulting Services Edmonton School Public Schools Queen Elizabeth High School 9425 - 132 Avenue Edmonton, Alberta T5E 0Y4 Phone: (780) 472-4455 Fax: (780) 478-7037 E-mail: Judy.Miller@epsb.ca

ZONES 4, 5 and 6 REACH Services
(Regional Educational Assessment and Consultation Services)
Emily Follensbee School
5139 – 14 Street SW
Calgary, Alberta
T2T 3W5
Phone: (403) 777-6983
Fax: (403) 777-6997
E-mail: ddmorgan@cbe.ab.ca

Services for Francophone Authorities
Le Réseau provincial d'adaptation scolaire
206, 8627 – 91 Street
Edmonton, Alberta
T6C 3N1
Phone: (780) 487-3200
Fax: (780) 487-3434
E-mail: sgareaukubicki@csrcn.ab.ca

PURPOSE

A purchasing credit to assist in purchasing learning resources at the Learning Resources Centre (LRC) is provided to **school jurisdictions**, accredited **private schools** and band operated and Federal Government administered First Nations **schools**.

CONDITIONS

1. **Revised** The Learning Resources Credit Allocation (LRCA) is used by **school jurisdictions** and accredited **private schools** to help pay for learning resources purchased from the LRC. The LRCA covers 25 percent of an order while the **school jurisdiction** or accredited **private school** pays for 75 percent of the order value when applied, until the LRCA is fully utilized.
2. Unless requested otherwise by the **school jurisdiction** or accredited **private school**, the LRCA will be applied automatically against purchase orders until the full credit amount is used. **School jurisdictions** and accredited **private schools** that do not want a particular purchase order charged against the credit should clearly state, "DO NOT APPLY THE LEARNING RESOURCES CREDIT ALLOCATION" on the purchase order sent to LRC.
3. The LRC will charge the regular selling price after the credit amount is fully utilized.

REQUIREMENTS

1. A **school jurisdiction** or accredited **private school** is not required to apply for the LRCA; Alberta Education will determine the credit amount allocated on the school's account with the LRC using enrolment information in Grades 1 to 12 (who are under the age of 20) on September 30 of the previous school year. To receive the credit, students must be registered by the **school jurisdiction** or the accredited **private school** with the Information Services Branch.

CONSIDERATIONS

1. The 2005/2006 Learning Resources Credit Allocation is valid for April 1, 2005 to March 31, 2006.
2. If requested, LRC will assist **school jurisdictions** and accredited **private schools** in managing locally determined credit ceilings on an individual **school** basis.
3. **School jurisdictions** and accredited **private schools** may call the LRC or visit the LRC website at www.lrc.learning.gov.ab.ca to inquire about the status of their credit.
4. **School jurisdictions** and accredited **private schools** must show the amount of credit utilized as 'Provincial Revenue' and also as an expenditure on the Audited Financial Statements.

PURPOSE

This funding is provided for the management of six regional professional development consortia that coordinate resources at the local, regional and provincial level to support the development of knowledge, skills, and attributes necessary for all people who have an influence on student education.

CONDITIONS

1. The consortium and its agent **board** will operate under the provisions of the “Guidelines for Establishing Regional Consortia” and the recommendations of the Alberta Regional Professional Development Consortia 2003 Assessment Final Report.
2. Funding will be provided, to the six established regional professional development consortia approved by the **Minister**, for the management and “infrastructure” of the consortium.
3. Alberta Education will provide infrastructure funding to a consortium’s agent **board** at the specified rates.
4. Each consortium shall provide services on a cost-recovery basis.

REQUIREMENTS

1. If the annual infrastructure expenses are less than the funding provided by Alberta Education, the consortium may transfer the surplus funds to the consortium program account. The consortium may utilize surplus funds for the delivery of professional development programs and services.
2. The consortium must ensure that it has sufficient funds in its Accumulated Surplus to cover any current year deficit.
3. Each consortium shall assign an agent **board** to provide financial services, including financial reporting, on behalf of the consortium.
4. The agent **board** will provide the consortium with a Statement of Revenues and Expenses, a Statement of Financial Position and the Certification (Form 05AE6.4). The consortia shall submit their statements to the School Finance Branch by December 31. The consortia shall also submit to the School Improvement Branch by December 31, an annual report that provides program details and results achieved.

5. Each consortium's Board of Directors shall complete plans to assist **schools** and **school jurisdictions** in the implementation of education programs through brokering and co-ordination of regional professional development, and development opportunities for the education community.

CONSIDERATIONS

1. Alberta Education will provide infrastructure funding to a consortium through its agent as follows:

70 percent – September
30 percent – April

The release of the scheduled April payment will be dependent upon the receipt of the prior school year's Statement of Revenues and Expenses.

2. The **Minister** and the agent **boards** may add to, delete, vary or amend the terms of the Guidelines by reciprocal correspondence and mutual agreement.

3. CONSORTIA NAMES

AGENT BOARD

Updated

Southern Alberta Professional Development Consortium	Lethbridge School District No .51
Calgary Regional Consortium	Greater Southern Public Francophone Education Region No. 4
Central Alberta Regional Consortium	Red Deer School District No. 104
Edmonton Regional Consortium	Parkland School Division No. 70
East Central Regional Consortium	Lakeland RCSS District No 150
Northwest Regional Education Consortium	Grande Prairie School District No. 2357

REFERENCES

Guidelines for Establishing Regional Consortia: An Initiative for the improvement of Education and Its Delivery, Alberta Education, October 1995

New Alberta Regional Professional Development Consortia 2003 Assessment Final Report

PURPOSE

This funding repays the annual supported debt, principal and interest, that **school jurisdictions** owe on **school** facilities.

CONDITIONS

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

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

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

5. Interest-shielding through payment for debenture interest on the unsupported portion of the principal is limited to compensation for interest rates up to 12 percent inclusive.

CONSIDERATIONS

1. 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.
2. The payment schedule for supported capital loans is on a monthly basis using information requested on Form 05AE6.5. These payments will be made directly to **school jurisdictions**.
3. Interest-shielding on unsupported debentures will be paid directly to the **school jurisdiction**.

**2005-2006
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SCHOOL JURISDICTIONS

**SECTION 7.1
SCHOOL JURISDICTION FUNDING RATES**

School Jurisdictions Base Funding	2004-2005	2005-2006
For the 2005-2006 school year, most funding rates were increased by 2%. Base Instruction funding rates were increased by 2.5%, Transportation rates were increased 3% and the Severe Disabilities rate was increased 4%.		
ECS Base Instruction (per funded child)	\$2,482	\$2,544
Base Instruction Grades 1 – 12:		
Grades 1 – 9 (per funded student)	\$4,963	\$5,087
Grades 10 – 12 (per CEU)	\$141.80	\$145.34
Outreach Programs:		
Outreach Base funding (per program)	\$52,020	\$52,020
Grades 1 – 9 (per funded student)	\$4,963	\$5,087
Grades 10 – 12 (per CEU)	\$141.80	\$145.34
Integrated Occupational (IO):		
Grades 10 – 12 (per CEU)	\$236.33	\$242.24
Home Education (per eligible funded student)	\$1,241	\$1,272
Plus 50% of the cost of ADLC courses for Gr. 7-12 to a maximum of:	\$1,241	\$1,272
Plus additional funding for Grades 1 -6		
Differential Cost Funding		
Education Grant Rate (per eligible funded child/student)	\$1,637	\$1,670
Multiply by weighting factor where applicable		
ECS Mild or Moderate Disability/Delay, Gifted and Talented	\$2,154	\$2,197
(per eligible funded child) –weighting factor of 1.316		
ECS Program Unit		
Maximum per eligible funded child	\$21,707	\$22,141
Maximum for each additional funded child in a unit	\$5,385	\$5,493
Severe Disabilities (per funded student based on severe profile)	\$14,415	\$14,992
Weighting factor of 8.977		
English as a Second Language	\$1,020	\$1,040
(per eligible FTE funded child/student) weighting factor of 0.623		
First Nations, Métis and Inuit Education	\$1,020	\$1,040
(per eligible FTE funded child/student) weighting factor of 0.623		
Socio-Economic Status (per eligible FTE funded child/student)	\$408	\$416
Weighting factor of 0.249		
Small Schools by Necessity: Base Allocation		
Schools with ≤ 150 FTE students	\$76,500	\$78,030
Schools with > 150 but < 226 FTE students	sliding scale reducing to zero	

School Jurisdictions Differential Cost Funding			2004-2005	2005-2006
Small Schools by Necessity: Variable Allocation				
School Type	Peak Enrolment	Enrolment Limit		
K – 3	40	80	\$510	\$520
K – 6	80	150	\$1,428	\$1,457
K – 9	80	220	\$1,632	\$1,665
K – 12	80	290	\$2,550	\$2,601
Intra-Jurisdiction Distance (per km of eligible distance)			\$1.02	\$1.04
Enrolment Growth:				
Year-to-year growth:				
Growth rate > 4% (per FTE funded child/student)			\$552	\$563
Growth rate > 7% (per FTE funded child/student)			\$552	\$563
Enrolment Decline:				
Year-to-year decline:				
Decline rate > 1.5% (per FTE funded child/student)			\$3,723	\$3,797
Decline rate > 4% (per FTE funded child/student)			\$552	\$563
Small Board Administration				
Charter School (per school)			\$56,100	\$57,222
School jurisdiction enrolment < 2000 (per school jurisdiction)			\$408,000	\$416,160
School jurisdiction enrolment > 2000 but < 3000			sliding scale reducing to zero	
Northern Allowance				
Lower Zone (per FTE funded enrolment)			\$408	\$416
Intermediate Zone (per FTE funded enrolment)			\$612	\$624
Upper Zone (per FTE funded enrolment)			\$918	\$936
Relative Cost of Purchasing Goods and Services Adjustment (RCPA)				
(20% of total Education funding except Prov. Priorities and Transportation)			per jurisdiction rate	
(47% of Transportation and Boarding funding from Education)			per jurisdiction rate	
Francisation (per eligible FTE funded child/student)			\$1,020	\$1,040
Weighting factor of 0.623				
Stabilization			top up funding of 2004-2005 amount plus 2%	
(to ensure a school jurisdiction receives identical funding under new funding framework compared to the old framework)				
Enhanced ESL/Francisation and Support Services for Immigrant Students (per eligible FTE funded child/student)			\$357	\$364
Weighting factor of 0.218				

School Jurisdictions Differential Cost Funding	2004-2005	2005-2006
Hutterite Colony Schools (per colony school)	\$10,000	\$10,200
Daily Physical Activity (per eligible Grades 1-9 school)	N/A	\$1,000
Francophone Equivalency Access (per eligible funded student)	N/A	\$550
Provincial Priority Targeted Funding		
Student Health Initiative	per formula	
Alberta Initiative for School Improvement (AISi) (Maximum per registered student)	\$123	\$125
High Speed Networking (max. per month per approved site)	\$503.50	\$503.50
Small Class Size Initiative Funding	per formula	
Children and Youth with Complex Needs	per formula	
Other Provincial Support Funding		
Institutional Programs	net cost of program for eligible students	
Regional Educational Consulting Services	as per approved allocation	
Learning Resources Credit (per registered student)	\$10.67	\$10.88
Regional Consortium (per consortium)	\$166,368	\$169,695
Transportation Funding		
Urban Transportation 3% increase; ECS Special -adjusted plus 3%		
10,000-19,999 population (per eligible passenger)	\$520	\$536
20,000-29,999 population (per eligible passenger)	\$483	\$497
30,000 + population (per eligible passenger)	\$445	\$458
Special (per eligible funded student with a disability)	\$2,365	\$2,436
ECS Special (per round trip/eligible transported child – max. of 185 trips)	\$11.97	\$13.17
Weekend (per eligible funded student)	\$3,851	\$3,967
Boarding (per eligible funded student)	\$3,461	\$3,565
Interschool Transportation Rates (per km for two-way distance between schools for eligible programs)	\$0.69	\$0.71

**2005-2006
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SCHOOL JURISDICTIONS

**SECTION 7.1
SCHOOL JURISDICTION FUNDING RATES**

School Jurisdictions Transportation Funding	2004-2005	2005-2006
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Metro Urban Transportation 3% increase; ECS Special adjusted plus 3%

Regular (per expected eligible passenger)	\$445	\$458
Special (per funded student based on severe profile)	\$2,365	\$2,436
ECS Special (per round trip/eligible transported child - max of 185 trips)	\$11.97	\$13.17

Rural Transportation 3% increase; ECS Special adjusted plus 3%

Regular	formula based using grid below	
Special (per eligible funded student with a disability)	\$4,731	\$4,873
ECS Special (per round trip/eligible transported child –max of 185 trips)	\$11.97	\$13.17
Weekend (per eligible funded student)	\$3,851	\$3,967
Interschool Transportation Rates (per km for two-way distance between schools for eligible programs)	\$0.69	\$0.71
Boarding (per eligible funded student)	\$3,461	\$3,565

Distance (Km)	2.4-5.9	6-9.9	10-13.9	14-17.9	18-25.9	26-37.9	38+
Rate	\$8.85	\$12.95	\$15.49	\$17.81	\$21.43	\$22.63	\$23.80

<u>Weighted Passengers</u>		<u>Density of Effective Transportation Service Area</u>								
	0-.29	.30-.35	.36-.57	.58-.76	.77-.95	.96-1.14	1.15-1.30	1.31-1.59	1.60-3.01	3.02+
0-700	\$541	\$619	\$657	\$662	\$667	\$689	\$773	\$920	\$1,243	\$1.451
701 -1400	\$541	\$599	\$647	\$659	\$662	\$684	\$770	\$903	\$1,093	\$1,451
1401 – 2100	\$541	\$591	\$630	\$657	\$659	\$680	\$768	\$893	\$1,091	\$1,451
2101 – 2800	\$541	\$561	\$591	\$655	\$657	\$678	\$767	\$888	\$972	\$1,383
2801 – 3500	\$541	\$558	\$591	\$647	\$655	\$662	\$716	\$778		
3501 – 4200	\$541	\$552	\$561	\$645	\$647	\$662	\$710	\$736		
4201 – 4900	\$536	\$541	\$552	\$578	\$645	\$657	\$710			
4901 – 5600	\$536	\$536	\$543	\$552	\$552	\$630	\$642			
5601 – 6300	\$536	\$536	\$536	\$552	\$552	\$575				
6301 +	\$536	\$536	\$536	\$536	\$536					

ECS Funding for Private ECS Operators and Private Schools with approved ECS Programs	2004-2005	2005-2006
For the 2005-2006 school year, most funding rates were increased by 2%. Base Instruction funding rates were increased by 2.5%, Transportation rates were increased by 3%.		
ECS Base Instruction Funding (per funded child)	\$2,272	\$2,544
Portable Classrooms for ECS Operators (per month plus GST)	\$100	\$100
Mild/Moderate, Gifted and Talented (per eligible funded child)	\$2,154	\$2,197
Program Unit Funding		
Maximum per eligible child	\$21,707	\$22,141
Maximum for each additional child in a unit	\$5,385	\$5,493
ECS Transportation – Regular (per eligible transported child)	\$445	\$458
ECS Transportation – Special Needs (adjusted plus 3%) (per round trip/eligible transported child - max of 185 trips)	\$11.97	\$13.17
Plant Operation and Maintenance (per funded child) no increase	\$237	\$237
Plus (for every 25 funded children or portion thereof -based on 40 sq. m.)	\$474	\$474
ECS Administration (percentage based on enrolments of <2000 FTE funded children)	6% of ECS funding per section 2.7	
Alberta Initiative for School Improvement (AISi) (maximum per registered child)	\$62	\$62.50
High Speed Networking Funding (maximum per month per approved site)	\$251.75	\$251.75

Private Schools Funding	2004-2005	2005-2006
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For the 2005-2006 school year, most funding rates were increased by 2%. Base Instruction funding rates were increased by 2.5%. Severe Disabilities rate was increased by 4%.

Base Instruction Funding

Grades 1 – 9 (per funded student)	\$2,978	\$3,052
Grades 10 – 12 (per CEU - max of 60 CEU's/student per year)	\$85.09	\$87.20

Designated Special Education Private Schools (DSEPS)

Instruction funding rate for students with mild or moderate disabilities whose parents consulted with their resident school board prior to placement in the DSEPS (coded as 110).	\$9,125	\$9,353
Instruction funding rate for students with mild or moderate disabilities whose parents did not consult with their resident school board prior to placement in the DSEPS (do not code as 110). This is also the Base Instruction rate for students with severe disabilities in DSEPS .	\$5,683	\$5,825

Integrated Occupational (IO):

Grades 10 – 12 (per CEU)	\$141.82	\$145.34
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Severe Disabilities Funding (per eligible **funded student**)

\$14,415	\$14,992
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Home Education (per eligible **funded student**)

\$1,241	\$1,272
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Plus 50% of the cost of ADLC courses for Grades 7 - 12 to a maximum of:	\$1,241	\$1,272
Plus additional funding for Grades 1-6 ADLC courses		

Early Literacy (per **funded student** in Grades 1 and 2 on Sept 30)

\$138	\$141
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Learning Resources Credit (per registered student)

\$10.67	\$10.88
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Institutional Programs

net cost of program for eligible students

Alberta Initiative for School Improvement (AISI)
(maximum per registered student)

\$74	\$75
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High Speed Networking Funding
(maximum per month per approved site)

\$302.10	\$302.10
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Daily Physical Activity (per eligible Grades 1-9 **school**)

N/A	\$600
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PART 1 – School Jurisdiction Funding

Sections 1.1 to 1.29, 5.2, 5.4, 6.1 and 6.2.

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

Alberta School Foundation Fund (ASFF)

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

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

Payments

Revised Funding will be distributed on a monthly basis at 8.33% per month, with the exception of January and August - which will be at 8.35% and the month of March. An initial payment of 5% will be processed for March 10 and an additional payment will be made by March 31. If this additional payment does not equal 3.33%, then the difference will be either deducted/added to the April 15 payment, based on the prior approval of the Assistant Deputy Minister, Corporate Services.

Payment Receipt Dates

Sept. 15, 2005	Jan. 16, 2006	Apr. 18, 2006	Aug. 15, 2006
Oct. 17, 2005	Feb. 15, 2006	May. 15, 2006	
Nov. 15, 2005	Mar. 10, 2006	Jun. 15, 2006	
Dec. 15, 2005	Mar. 31, 2006	Jul. 17, 2006	

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

Adjustments will be made in January for Grades 1 to 9 funding. For Grades 10 to 12, payments will be adjusted at the end of March and August, and if necessary, the following October for summer students.

In all cases, when funding is adjusted during the school year, the payment system will determine the amount owing to date, the advances previously paid, and the balance owing to adjust the allocation to the correct amount.

PART 4 – Federal French Funding

Sections 4.1 and 4.2

On approval of allocations	⇔ 100 %
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PART 5 – Provincial Priority Targeted Funding

Section 5.1 Student Health Initiative and Section 5.5 Children and Youth with Complex Needs

On approval of joint plan	⇔ 58.33 % advance
March/April	⇔ 100 % less previous payment

Section 5.3 High Speed Networking Funding

September or upon approval of application	⇔ Prorated basis to March 31
April or upon approval of application	⇔ Prorated basis to August 31

PART 6 Other Provincial Support

Section 6.4 Regional Consortium Funding

September	⇔ 70 %
*April	⇔ 100 % less previous payments

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

Section 6.5 Debt Retirement

Supported debenture payments are made directly to the Alberta Municipal Financing Corporation on behalf of the **school jurisdiction**.

Funding for short term loans will be paid to a **school jurisdiction** on the same day as Funding Framework of each month is based on 1/12 of the loans payable by the **school jurisdiction** in the school year.

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.

Revised

Sections 2.1, 2.2, 2.6 to 2.7 and 5.2.

The first payment for **private ECS operators** is processed after the “Notice of Intent to Operate” is received and is based on the enrolment estimate from that form.

All payments in January or later will be based on adjusted amounts using current year September 30 enrolment counts.

September	⇔ 40 % advance*
January	⇔ 70 % less previous payment**
April	⇔ 100 % less previous payments

*Any ECS program with 13 or more mild/moderate children in the prior school year will receive an advance of Mild or Moderate funding based on last year’s child enrolment.

** All ECS programs with mild/moderate children will receive Mild or Moderate funding based on their current year September 30 enrolment count.

Note: With the approval of the Assistant Deputy Minister, Corporate Services, a March payment may be made up to 90 % less previous payments.

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

Revised

Section 2.3 Program Unit Funding (PUF)

September – Designated Sp. Ed. ECS programs	⇔ 40 % advance based on the previous year approved PUF budget amount.
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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.
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Upon receipt of PUF application	⇔ 70 % less any previous amount
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April	⇔ 80 % less previous payments
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May	⇔ 90 % less previous payments
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Upon approval of final costs	⇔ 100 % less previous payments
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Note: With the approval of the Assistant Deputy Minister, Corporate Services, a March payment may be made up to 90 % less previous payment.

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

Revised **Sections 2.4 and 2.5 Transportation**
 Payment is based on receipt and review of a transportation application

January	⇔ 70 % advance
April	⇔ 100 % less previous payments

PART 4 – Federal French Funding

Sections 4.2 Federal French Language

On approval of allocations	⇔ 100 %
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PART 5 – Provincial Priority Targeted Funding

Section 5.3 High Speed Networking Funding

September or upon approval of application	⇔ Prorated basis to March 31
April or upon approval of application	⇔ Prorated basis to August 31

PART 3 – Private Schools Funding

The funding provided by Alberta Education to **funded accredited private schools** is released at set times provided all conditions and requirements have been met. The payment months are provided in this schedule to allow **funded accredited private schools** the opportunity to plan their cash flow to meet ongoing expenditures.

Sections 3.1 (Grades 1 – 9), 3.2 to 3.6 and 5.2

Advance payments will be made based on 2004/2005 enrolments and course information and 2005/2006 rates.

All payments in January or later will be based on 2005/2006 enrolments.

September	⇒ 40 % advance based on last year's enrolment
January	⇒ 58.33 % less previous payment
April	⇒ 100 % less previous payments

Note: With the approval of the Assistant Deputy Minister, Corporate Services, a March payment may be made up to 90 % less previous payments.

Section 3.1 Base Instruction (Grades 10 – 12)

September	⇒ 40 % advance based on last year's CEUs
March	⇒ 58.33 % less previous payment
August	⇒ 100 % less previous payments

Note: With the approval of the Assistant Deputy Minister, Corporate Services, a March payment may be made up to 90 % less previous payments.

PART 4 – Federal French Funding

Section 4.2 Federal French Language

On approval of allocations	⇒ 100 %
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PART 5 – Provincial Priority Funding

Section 5.4 High Speed Networking Funding

September or upon approval of application	⇒ Prorated basis to March 31
April or upon approval of application	⇒ Prorated basis to August 31

PART 6 – Other Provincial Support**Section 6.1 Institutional Programs and Resident Students of the Government**

September	⇒ 58.33 % advance based on approved budget claim form
April	⇒ 90 % less previous payments
On approval of Final Costs claim form	⇒ 100 % of actual costs less previous payments

PURPOSE

Enrolment counts are used to determine funding allocations for **school jurisdictions**, **funded private schools** and **private ECS operators** and are based on information obtained from Information Services.

CONDITIONS

1. All ECS children and all students in Grades 1 to 12 who are enrolled and attending a **school** on September 30 of the school year will be counted at the **school** they are attending on that date. Enrolment records must be kept on file in the **school authority** or **school** that will substantiate the September 30 ECS child/student enrolment data submitted to the information Services Branch. Students and ECS children enrolled after the **count date** will not be counted for funding purposes.
2. A **school authority** may count a student who was not physically in attendance on the **count date** if the student was enrolled and in attendance prior to the **count date** and returned to class within 15 calendar days of the **count date**.
3. A **funded child/student** who was not physically in attendance in any **school authority** on the **count date** but was in attendance in a **school authority** prior to the **count date**, and then changed to a different **school authority** during the **count date** period, may be claimed by the receiving **school authority** if the **funded child/student** was enrolled and in attendance within five calendar days of the **count date**.
4. **Funded children/students** who are receiving their education in a **home education program** provided by their **parents** will be counted by the supervising **school authority** where the student is enrolled on the **count date**.
5. **School jurisdictions** or **funded private schools** offering year round education to **funded students** in Grades 1 to 9 will use **count dates** determined by School Finance on an individual basis to ensure fair and equitable funding for the students they are educating.
6. A priority **school** conflict occurs when more than one **school** claims the **funded child/student** on the September 30 **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 30 **count date**.

7. Priority **school** conflicts must be resolved before a **school authority** is entitled to receive funding for a **funded child/student**. When priority **school** conflicts occur, **school authorities** should make every effort to resolve them as they have first-hand knowledge of the instruction the student is receiving and are in the best position to determine a fair and equitable solution.
8. If **school authorities** cannot resolve a priority **school** conflict, they should forward supporting documentation to School Finance for resolution as follows:

For Grades ECS to 9

Attendance Sheets for the months of September and October are required, along with any documentation indicating (if applicable) the date of the **funded child's/student's** last day of attending **school** and registration forms for new children/students.

For Grades 10 to 12

Instructional minutes for the first term (September through January) are required. These minutes should be based on the actual attendance of the **funded child/student** in all the courses that they were registered in the **school** during the first term. Note: Do not factor in second term class time.

Example: If a **funded child/student** missed a total of 30 classes in the first term, the instructional minutes should be based on total class time offered in the first term minus the 30 classes missed. Do not default to total class time offered.

In making its decision, School Finance will determine the priority **school** as follows:

- a) The **school** where the **funded child** was enrolled, and in attendance, on the **count date**;
- b) If the **funded child/student** was enrolled, and in attendance, in two or more **school authorities** on the **count date**:
 - i) The **school** delivering the majority of instructional minutes in the first term of the current school year would be deemed the priority **school**; or
 - ii) In situations where instructional minutes are the same for two **school authorities**, funding will be distributed at 50 % of the Base Instruction rate applicable to each **school authority**.

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9. **Course conflicts (Grades 10 –12)**

A course conflict occurs when a regular senior high student has a **school** awarded mark reported by two **schools** in the same course, in the same semester and in the same school year. The **school** that delivered the most instructional minutes will be deemed the priority **school**. School Finance will identify these students in a turn-around report for **school authorities**.

To resolve these conflicts, the Course Conflict form must be completed and submitted to School Finance Branch by using the Funding Events System (FES) or by paper submissions. On this form, the **school** must indicate the number of actual instructional minutes delivered to the student. These minutes should be based on the total class time offered minus any class time absent. Do not default to total class time offered.

REQUIREMENTS

1. Enrolment counts of **funded children/students** in ECS to Grade 12 must be completed on September 30 and reported to the Information Services Branch by October 5.
2. The ages of all **funded students** and **funded children** must be determined as of September 1.

CONSIDERATIONS

1. The Student Information System User's Guide provides additional information for reporting student enrolments.

SUMMARY OF FUNDING APPLICATION FORMS

DELEGATION OF SIGNING AUTHORITY FORM

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.

School Authority Name: _____

School Authority Code: _____

NAME (S) (Please Print)	SIGNATURES

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

Secretary – Treasurer

Date

SCHOOL JURISDICTIONS AND PRIVATE SCHOOLS

JUNIOR HIGH COURSES (TAKEN BY SENIOR HIGH STUDENTS)

For the School Year: September 1, 2005 to August 31, 2006

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

Name of School: _____ School Code: _____

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

COMPLETION DATE

☐ September 1 to March 1

☐ March 2 to June 30

☐ July 1 to August 31
(Summer School Only)

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

CERTIFICATION

I certify the information reported on this form is correct.

(Signature of: Secretary-Treasurer/Superintendent)

(Signature of: Teacher/Principal)

(Date)



**BASE INSTRUCTION
ADD, MODIFY, DELETE FORM
FOR ENROLMENTS**

School Year: 2005/2006

Count Date: September 30, 2005

Authority Code: _____ **Authority Name:** _____

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

Action: _____	Registration: _____	Grade: _____	Enrolment Date: _____
ASN: _____	Local Board ID: _____	Citizenship: _____	Expiry Date: _____
Last Name: _____	First Name: _____	Sec.23 Eligibility: _____	French Hours: _____
AKA Last Name: _____	AKA First Name: _____	Reg. Entry Status: _____	Resident Juris: _____
Birth Date: _____	Gender: _____	Exit Description: _____	Exit Date: _____
Address Line 1: _____		Special Needs: 1 _____ 2 _____	
Address Line 2: _____		Enrolment Type: 1 _____ 2 _____ 3 _____	
City: _____	Province: _____	Grant Codes: 1 _____ 2 _____ 3 _____	
Postal Code: _____	Phone: _____		

See Reverse for Legend

Comments: _____

Blended Home
Percentage of
Program at School

Please Note: The student must be enrolled and attending on September 30th of the current school year.

CERTIFICATION

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

(Signature of: Secretary-Treasurer/Superintendent)

(Signature of: Teacher/Principal)

(Date)

Legend

Action:	(A) Add, (M) Modify, (D) Delete
ASN:	Alberta Education assigned (Alberta Student Number) (9 Digits)
Last/First Name:	Student Name
Local Board ID:	Then 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 Enrolment Type Table in Student Information System User's Guide
Grant Codes:	Refer to Enrolment Type 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:	This field applies to: a) Designated Special Education Private Schools (Code 110). For students who's parents consulted with their resident school jurisdiction prior to 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 Needs:	The following codes are for students and ECS children who have identified special needs. For funding purposes they should also be coded with the 500 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 THE
2005 - 2006 SCHOOL YEAR**

School Authority 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*. As the Board Chairman, Superintendent and Secretary-Treasurer, we support the education practices of the jurisdiction and affirm that the policies of the jurisdiction are in alignment with the intent of education funding to provide a quality education that best meets the needs of students.”

TITLE	SIGNATURES	DATE
Board Chairman		
Superintendent		
Secretary Treasurer		

**APPLICATION TO OPERATE A NEW
OUTREACH PROGRAM**

An outreach program is a program offered by a school to provide a basic education for funded students who are unable to attend or benefit from a regular school program. For the program requirements, refer to the *Funding Manual for School Authorities* Part 1, Section 1.3, and the *Policy, Regulations and Forms Manual (Outreach Program Policy 1.1.4)*.

School Authority: _____
Name and Code of School Jurisdiction

Superintendent: _____

Name of Outreach Program: _____

Grades Offered: _____

Principal Responsible for Outreach Program: _____

Will the program require a school code: Yes ☐ No ☐ (please check one)

If NO: _____
Name and Code of School Offering Outreach Program

Telephone Number of Outreach Program: (____) _____

Fax Number of Outreach Program: (____) _____

Physical Location of Outreach Program (Address): _____

Mailing Address (if different from address above): _____

School boards intending to offer an outreach program must identify a stand-alone facility for each program. Boards must ensure that the building used for the program meets and will continue to meet all applicable local and provincial health, safety and building standards. Please provide a program plan on page 3 of this form. A copy of the board policy regarding outreach programs must be attached to this form. Board policy must be consistent with conditions as outlined in the Funding Manual for School Authorities, (Section 1.3) and the Policy, Regulations and Forms Manual (Outreach Program Policy 1.1.4).

Outreach Program Description

Rationale for the Outreach Program Application:

Note: Prior to making an application superintendents should consider how they might meet the needs of these students through existing funding sources, modifications to existing school programs, and partnerships with other school jurisdictions and community service agencies.

Please provide the following information to complete your application and attach a program plan.

1. Describe the unique needs of the student population that the program plans to serve and the grade levels offered.

2. How will the program serve students who could not be served at a traditional school setting? Describe the type of programming that would be offered, such as Alberta Distance Learning (ADL) courses and the method of evaluation that will be used for students and for the program.

3. What connections has the program made or is the program planning to make with other service organizations to demonstrate and enhance community support and involvement for the program?

4. What additional support programs will be offered to assist these students in becoming successful community members (e.g., counseling; anger management, time management, etc.)?

5. How far away is the program located from another outreach program?

6. Does the jurisdiction offer other outreach programs? If so, please provide the name(s) of the other outreach program(s).
7. What is the potential to partner with another jurisdiction to offer the outreach program?
8. Has the board passed a motion to establish an outreach program and developed a policy for the outreach program (please attach a copy of the board motion and the policy)?
9. Describe and name the stand-alone facility in which the outreach program will be located. Attach a health and safety inspection or indicate when these will be completed.

Note: Alberta Education will not automatically approve all applications for new Outreach Programs. The applicant must clearly establish that:

- 1) The jurisdiction has a reasonable number of students with extraordinary needs, and;**
- 2) The only reasonable way to meet these needs is through establishment of an Outreach Program.**

Please also note that a Field Services manager will conduct an on-site visit to confirm the implementation of the approved program.

For further information about establishing an outreach program, please refer to the *Outreach Programs Handbook* (<http://www.education.gov.ab.ca/educationsystem/OutreachProgHandbook.pdf>)

DECLARATION:

I declare this program will be offered in accordance with the requirements identified in the *Funding Manual for School Authorities* and the *Policy, Regulations and Forms Manual*.

Superintendent

Date

RECOMMENDED FOR APPROVAL:

Reviewer (Education Manager)

Date

APPROVAL FOR OUTREACH PROGRAM:

Director

Date

***Submit to Zone Services Branch, Alberta Education, 9th Floor East, 44
Capital Boulevard, 10044 - 108 Street, Edmonton, Alberta, T5J 5E6***

REPORT OF JUNIOR HIGH AND SENIOR HIGH HOME EDUCATION STUDENTS

**WHOSE ADL COURSES WERE FULLY FUNDED BY THE SCHOOL AUTHORITY FOR HOME
EDUCATION STUDENTS ENROLLED ON SEPTEMBER 30, 2005 OR WHO MOVED FROM
ANOTHER SUPERVISING BOARD AFTER SEPTEMBER 30, 2005**

For the School Year: September 1, 2005 to August 31, 2006

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					\$

**PLEASE REFER TO THE ATTACHED COURSE LEGEND AND CLAIMABLE AMOUNT OF
COURSE COSTS**

CERTIFICATION

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

(Signature of: Secretary-Treasurer/Superintendent)

(Signature of: Teacher/Principal)

(Date)

ALBERTA DISTANCE LEARNING CENTRE PRINT COURSE COSTS
APPROVED FOR REIMBURSEMENT BY ALBERTA EDUCATION

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course Code	Subject	Registration Fee	Compulsory	Claimable Amount
Grade Seven	7100	Language Arts 7	\$155.00	None	\$155.00
	7110	Mathematics 7	\$195.00	None	\$195.00
	7130	Health & Personal Life Skills 7	\$195.00	\$10.00	\$205.00
	7140	Science 7	\$195.00	\$30.00	\$225.00
	7150	Social Studies 7	\$195.00	\$25.00	\$220.00
	7160	Physical Education	\$170.00	None	\$170.00
	7310	Art A	\$130.00	None	\$130.00
	7350	French A	\$130.00	None	\$130.00
	7360	German A	\$130.00	None	\$130.00
	7380	Ukrainian A	\$130.00	None	\$130.00
	7410	Music A	\$170.00	None	\$170.00
	7550	Environmental and Outdoor Education (Year 1)	\$170.00	None	\$170.00
Grade Eight	8100	Language Arts 8	\$155.00	None	\$155.00
	8110	Mathematics 8	\$195.00	None	\$195.00
	8130	Health & Personal Life Skills 8	\$195.00	\$15.00	\$210.00
	8140	Science 8	\$195.00	None	\$195.00
	8150	Social Studies 8	\$195.00	\$15.00	\$210.00
	8310	Art B	\$130.00	None	\$130.00
	8350	French B	\$130.00	None	\$130.00
	8360	German B	\$130.00	None	\$130.00
	8380	Ukrainian B	\$130.00	None	\$130.00
Grade Nine	9100	Language Arts 9	\$195.00	None	\$195.00
	9110	Mathematics 9	\$195.00	None	\$195.00
	9130	Health & Personal Life Skills 9	\$195.00	None	\$195.00
	9140	Science 9	\$195.00	None	\$195.00

ALBERTA DISTANCE LEARNING CENTRE PRINT COURSE COSTS
APPROVED FOR REIMBURSEMENT BY ALBERTA EDUCATION

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course Code	Subject	Registration Fee	Compulsory	Claimable Amount
	9150	Social Studies 9	\$195.00	\$10.00	\$205.00
	9210	Mathematics Modified 9	\$195.00	None	\$195.00
	9310	Art C	\$130.00	None	\$130.00
	9350	French C	\$130.00	None	\$130.00
	9380	Ukrainian C	\$130.00	None	\$130.00
Grades	AGR 1010	Agriculture 1010	\$53.00	None	\$53.00
10, 11, and 12	AGR 1060	Agriculture 1060	\$53.00	None	\$53.00
	AGR 1110	Agriculture 1110	\$53.00	None	\$53.00
	CMH 1010	Community Health 1010	\$53.00	None	\$53.00
	CMH 1050	Community Health 1050	\$53.00	None	\$53.00
	CMH 1060	Community Health 1060	\$53.00	None	\$53.00
	CMH 2010	Community Health 2010	\$53.00	None	\$53.00
	CMH 2050/3050	Community Health 2050	\$120.00	\$10.00	\$130.00
	CMH 3010	Community Health 3010	\$53.00	None	\$53.00
	CMH 3020	Community Health 3020	\$53.00	None	\$53.00
	CMH 3030	Community Health 3030	\$53.00	None	\$53.00
	CMH 3040	Community Health 3040	\$53.00	None	\$53.00
	CMH 3140	Community Health 3140	\$53.00	None	\$53.00
	COM 1020	Communication Tech. 1020	\$53.00	None	\$53.00
	COM 1070	Communication Tech. 1070	\$53.00	None	\$53.00
	CTR 1010	Career Transitions 1010	\$53.00	None	\$53.00
	CTR 1110A	Career Transitions 1110A	\$27.00	None	\$27.00
	CTR 1110B	Career Transitions 1110B	\$53.00	None	\$53.00
	CTR 1120	Fashion Studies CTR1120	\$27.00	None	\$27.00
	CTR 2110	Fashion Studies CTR2110	\$27.00	None	\$27.00

ALBERTA DISTANCE LEARNING CENTRE PRINT COURSE COSTS
APPROVED FOR REIMBURSEMENT BY ALBERTA EDUCATION

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course Code	Subject	Registration Fee	Compulsory	Claimable Amount
Grades	CTR 2120	Fashion Studies CTR2120	\$27.00	None	\$27.00
10, 11, and 12	CTR 2130	Fashion Studies CTR2130	\$27.00	None	\$27.00
	CTR 2140	Fashion Studies CTR2140	\$27.00	None	\$27.00
	CTR 2150	Fashion Studies CTR2150	\$27.00	None	\$27.00
	CTR 3110	Legal Studies 3110	\$53.00	None	\$53.00
	DES 1010	Design Studies 1010	\$53.00	None	\$53.00
	DES 1020	Design Studies 1020	\$53.00	None	\$53.00
	DES 1060	Design Studies 1060	\$53.00	None	\$53.00
	DES 2010	Design Studies 2010	\$53.00	None	\$53.00
	ELA 1104	English 10-2	\$185.00	None	\$185.00
	ELA 1105	English 10-1	\$185.00	None	\$185.00
	ELA 2104	English 20-2	\$185.00	None	\$185.00
	ELA 2105	English 20-1	\$195.00	None	\$195.00
	ELA 3104	English 30-2	\$200.00	None	\$200.00
	ELA 3105	English 30-1	\$195.00	None	\$195.00
	ELT 1010	Electro-Technologies 1010	\$53.00	None	\$53.00
	ESL 1121	English as a Second Language	\$130.00	None	\$130.00
	FAS 1030	Fashion Studies 1030	\$53.00	None	\$53.00
	FAS 1040	Fashion Studies 1040	\$53.00	None	\$53.00
	FAS 1050	Fashion Studies 1050	\$53.00	None	\$53.00
	FAS 1060	Fashion Studies 1060	\$53.00	None	\$53.00
	FAS 1070	Fashion Studies 1070	\$53.00	None	\$53.00
	FAS 2070	Fashion Studies 2070	\$53.00	None	\$53.00
	FAS 2080	Fashion Studies 2080	\$53.00	None	\$53.00
	FAS 2090	Fashion Studies 2090	\$53.00	None	\$53.00

ALBERTA DISTANCE LEARNING CENTRE PRINT COURSE COSTS
APPROVED FOR REIMBURSEMENT BY ALBERTA EDUCATION

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course Code	Subject	Registration Fee	Compulsory	Claimable Amount
Grades	FAS 2110	Fashion Studies 2110	\$53.00	None	\$53.00
10, 11, and 12	FIN 1010	Financial Management 1010	\$53.00	None	\$53.00
	FIN 1020	Financial Management 1020	\$53.00	None	\$53.00
	FIN 1030	Financial Management 1030	\$53.00	None	\$53.00
	FIN 2010	Financial Management 2010	\$53.00	None	\$53.00
	FIN 2020	Financial Management 2020	\$53.00	None	\$53.00
	FIN 2030	Financial Management 2030	\$53.00	None	\$53.00
	FIN 3010	Financial Management 3010	\$53.00	None	\$53.00
	FIN 3020	Financial Management 3020	\$53.00	None	\$53.00
	FIN 3030	Financial Management 3030	\$53.00	None	\$53.00
	FIN 3040	Financial Management 3040	\$53.00	None	\$53.00
	FIN 3060	Financial Management 3060	\$53.00	None	\$53.00
	FNA 1400	Art 10 3 credits	\$94.00	None	\$94.00
		4 credits	\$122.00	None	\$122.00
		5 credits	\$155.00	None	\$155.00
	FNA 1405	Art 11	\$195.00	None	\$195.00
	FNA 1424	Music 10	\$130.00	None	\$130.00
	FNA 2400	Art 20	\$180.00	None	\$180.00
	FNA 2405	Art 21	\$195.00	None	\$195.00
	FNA 3400	Art 30	\$185.00	None	\$185.00
	FNA 3405	Art 31	\$195.00	None	\$195.00
	FOR 1010	Forestry 1010	\$53.00	None	\$53.00
	FOR 1090	Forestry 1090	\$53.00	None	\$53.00
	FOR 2010	Forestry 2010	\$53.00	None	\$53.00
	FSL 1305	French 13	\$230.00	\$35.00	\$265.00

ALBERTA DISTANCE LEARNING CENTRE PRINT COURSE COSTS
APPROVED FOR REIMBURSEMENT BY ALBERTA EDUCATION

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course Code	Subject	Registration Fee	Compulsory	Claimable Amount
Grades	FSL 1309	French 10	\$230.00	\$25.00	\$255.00
10, 11, and 12	FSL 2309	French 20	\$230.00	\$50.00	\$280.00
	FSL 3309	French 30	\$175.00	\$20.00	\$195.00
	GER 1315	German 10	\$155.00	\$20.00	\$175.00
	GER 2315	German 20	\$155.00	\$15.00	\$170.00
	GER 3315	German 30	\$155.00	\$15.00	\$170.00
	INF 1020	Keyboarding 1	\$78.00	None	\$78.00
	INF 2030	Information Processing 2030	\$78.00	None	\$78.00
	INF 2040	Information Processing 2040	\$78.00	None	\$78.00
	INF 3030	Information Processing 3030	\$78.00	None	\$78.00
	INF 3040	Information Processing 3040	\$78.00	None	\$78.00
	INF 3050	Information Processing 3050	\$78.00	None	\$78.00
	LDC 2460	Religious Studies 25	\$165.00	None	\$165.00
	LGS 1010	Legal Studies 1010	\$53.00	None	\$53.00
	LGS 1020	Legal Studies 1020	\$53.00	None	\$53.00
	LGS 2010	Legal Studies 2010	\$53.00	None	\$53.00
	LGS 2020	Legal Studies 2020	\$53.00	None	\$53.00
	LGS 2030	Legal Studies 2030	\$53.00	None	\$53.00
	LGS 3010	Legal Studies 3010	\$53.00	None	\$53.00
	LGS 3040	Legal Studies 3040	\$53.00	None	\$53.00
	LGS 3050	Legal Studies 3050	\$53.00	None	\$53.00
	LGS 3080	Legal Studies 3080	\$53.00	None	\$53.00
	MAM 3010	Management and Marketing 3010	\$53.00	None	\$53.00
	MAM 3020	Management and Marketing 3020	\$53.00	None	\$53.00
	MAM 3030	Management and Marketing 3030	\$53.00	None	\$53.00
	MAM 3040	Management and Marketing 3040	\$53.00	None	\$53.00

ALBERTA DISTANCE LEARNING CENTRE PRINT COURSE COSTS
APPROVED FOR REIMBURSEMENT BY ALBERTA EDUCATION

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course Code	Subject	Registration Fee	Compulsory	Claimable Amount
Grades	MAM 3050	Management and Marketing 3050	\$53.00	None	\$53.00
10, 11, and 12	MAT 1037	Mathematics 10 (Pure)	\$195.00	None	\$195.00
	MAT 1038	Mathematics 10 (Applied)	\$195.00	None	\$195.00
	MAT 1041	Mathematics Preparation. 10	\$195.00	None	\$195.00
	MAT 2037	Mathematics 20 (Pure)	\$195.00	None	\$195.00
	MAT 2038	Mathematics 20 (Applied)	\$195.00	None	\$195.00
	MAT 2225	Mathematics 24	\$195.00	None	\$195.00
	MAT 3037	Mathematics 30 (Pure)	\$195.00	None	\$195.00
	MAT 3038	Mathematics 30 (Applied)	\$195.00	None	\$195.00
	MAT 3211	Mathematics 31	\$195.00	None	\$195.00
	OTH 1999	Special Projects 10 – 5 credits	\$115.00	None	\$115.00
	OTH 1999	Special Projects 10 – 3 credits	\$69.00	None	\$69.00
	OTH 2999	Special Projects 20 – 5 credits	\$115.00	None	\$115.00
	OTH 2999	Special Projects 20 – 3 credits	\$69.00	None	\$69.00
	OTH 3999	Special Projects 30 – 5 credits	\$115.00	None	\$115.00
	OTH 3999	Special Projects 30 – 3 credits	\$69.00	None	\$69.00
	PED 1445	Physical Education 10			
		Credits - 3	\$109.00	None	\$109.00
		Credits - 5	\$155.00	None	\$155.00
	PED 0770	CALM (Careers Life Management)	\$119.00	None	\$119.00
	SCN 1270	Science 10	\$195.00	None	\$195.00
	SCN 1288	Science 14	\$195.00	None	\$195.00
	SCN 2231	Biology 20	\$195.00	\$20.00	\$215.00
	SCN 2242	Chemistry 20	\$195.00	\$20.00	\$215.00
	SCN 2261	Physics 20	\$195.00	\$10.00	\$205.00
	SCN 2270	Science 20	\$195.00	\$30.00	\$225.00

ALBERTA DISTANCE LEARNING CENTRE PRINT COURSE COSTS
APPROVED FOR REIMBURSEMENT BY ALBERTA EDUCATION

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course Code	Subject	Registration Fee	Compulsory	Claimable Amount
Grades	SCN 2285	Science 24	\$195.00	None	\$195.00
10, 11, and 12	SCN 3230	Biology 30	\$195.00	\$20.00	\$215.00
	SCN 3240	Chemistry 30	\$195.00	\$10.00	\$205.00
	SCN 3260	Physics 30	\$195.00	\$40.00	\$235.00
	SCN 3270	Science 30	\$195.00	\$30.00	\$225.00
	SPN 1345	Spanish 10	\$140.00	None	\$140.00
	SPN 2345	Spanish 20	\$155.00	\$20.00	\$175.00
	SPN 3345	Spanish 35	\$155.00	\$35.00	\$190.00
	SSN 2171	Personal Psychology 20	\$119.00	None	\$119.00
	SSN 2172	General Psychology 20	\$119.00	None	\$119.00
	SSN 2176	General Sociology 20	\$119.00	None	\$119.00
	SSN 3166	World Geography 30	\$119.00	None	\$119.00
	SST 1150	Social Studies 10	\$185.00	None	\$185.00
	SST 1151	Social Studies 13	\$195.00	None	\$195.00
	SST 2150	Social Studies 20	\$195.00	None	\$195.00
	SST 2151	Social Studies 23	\$195.00	None	\$195.00
	SST 3150	Social Studies 30	\$195.00	None	\$195.00
	SST 3151	Social Studies 33	\$195.00	None	\$195.00
	TOU 1010	Tourism Studies 1010	\$53.00	None	\$53.00
	TOU 1040	Tourism Studies 1040	\$53.00	None	\$53.00
	TOU 1050	Tourism Studies 1050	\$53.00	None	\$53.00
	TOU 1060	Tourism Studies 1060	\$53.00	None	\$53.00
	TOU 1070	Tourism Studies 1070	\$53.00	None	\$53.00
	TOU 2050	Tourism Studies 2050	\$53.00	None	\$53.00
	TOU 3030	Tourism Studies 3030	\$53.00	None	\$53.00
	TOU 3040	Tourism Studies 3040	\$53.00	None	\$53.00
	TOU 3060	Tourism Studies 3060	\$53.00	None	\$53.00

**ALBERTA DISTANCE LEARNING CENTRE PRINT COURSE COSTS
APPROVED FOR REIMBURSEMENT BY ALBERTA EDUCATION**

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course Code	Subject	Registration Fee	Compulsory	Claimable Amount
Grades	TOU 3070	Tourism Studies 3070	\$53.00	None	\$53.00
10, 11, and 12	TOU 3080	Tourism Studies 3080	\$53.00	None	\$53.00
	UKR 1355	Ukrainian 10	\$155.00	\$25.00	\$180.00
	UKR 2355	Ukrainian 20	\$155.00	\$15.00	\$170.00
	UKR 3355	Ukrainian 30	\$155.00	\$10.00	\$165.00
	WLD 1010	Wildlife 30	\$73.00	None	\$73.00



For the School Year: September 1, 2005 to August 31, 2006

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

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

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

***PLEASE REFER TO THE CHART (on back) FOR FULL COURSE LOAD INFORMATION AND FOR COSTS ELIGIBLE FOR ADDITIONAL FUNDING.**

CERTIFICATION

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

(Signature of: Secretary-Treasurer/Superintendent)

(Signature of: Teacher/Principal)

(Date)

Alberta Distance Learning (ADL) Course Costs – Elementary 2005/2006

	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6
Course	Thematics 1	Thematics 2	Thematics 3	Language Arts 4	Language Arts 5	Language Arts 6
<i>Registration</i>	\$455.00	\$475.00	\$465.00	\$210.00	\$205.00	\$190.00
<i>Textbooks</i>	\$40.00	\$40.00	\$30.00	\$35.00	\$45.00	\$30.00
Course	Mathematics 1	Mathematics 2	Mathematics 3	Mathematics 4	Mathematics 5	Mathematics 6
<i>Registration</i>	\$205.00	\$205.00	\$215.00	\$210.00	\$195.00	\$190.00
<i>Textbooks</i>	\$-	\$ -	\$20.00	\$30.00	\$40.00	\$40.00
Course				Social Studies 4	Social Studies 5	Social Studies 6
<i>Registration</i>				\$145.00	\$145.00	\$145.00
<i>Textbooks</i>				\$50.00	\$60.00	\$50.00
Course				Science 4	Science 5	Science 6
<i>Registration</i>				\$190.00	\$210.00	\$190.00
<i>Textbooks</i>				\$ -	\$ -	\$ -
Total Cost	\$700.00	\$720.00	\$730.00	\$870.00	\$900.00	\$835.00
<i>Less: 50% funding provided by supervising board</i>	\$636.00	\$636.00	\$636.00	\$636.00	\$636.00	\$636.00
Excess costs eligible for additional funding	\$64.00	\$84.00	\$94.00	\$234.00	\$264.00	\$199.00

**ECS PROGRAM UNIT FUNDING
STATEMENT OF ACTUAL EXPENDITURES
FOR SCHOOL JURISDICTIONS
FOR 2004-2005 AND 2005-2006 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 with approved Designated Special Education ECS programs must complete a separate form for each designated program.
- 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 FOR 2004-2005 AND 2005-2006 SCHOOL YEAR

NAME OF SCHOOL JURISDICTION: _____

INSTRUCTION

Salaries and Wages	\$	
Employer's Portion of Fringe Benefits	\$	
Services Purchased	\$	
Supplies and Materials	\$	

PARENT INSERVICE/STAFF INSERVICE

\$ _____

TRANSPORTATION COSTS:

\$ _____

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

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

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

CAPITAL: FURNITURE AND EQUIPMENT

\$ _____

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

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

TOTAL ECS PUF EXPENDITURES	\$ _____
-----------------------------------	----------

FOR DESIGNATED SPECIAL EDUCATION ECS PROGRAMS ONLY

LESS: APPLICABLE REVENUES

• Base Instruction funding	-# of ECS Children on Sept. 30	_____	x	\$2,544	\$	
• Mild or Moderate funding	-# of ECS Children on Sept. 30	_____	x	\$2,197	\$	
• Other Revenues (please specify)	_____				\$	

TOTAL REVENUES \$ _____

NET ECS PROGRAM COSTS ELIGIBLE FOR PUF \$ _____

2005-2006 ECS PROGRAM UNIT FUNDING APPLICATION

Refer to Part 1, Section 1.6 (School Jurisdictions) and Part 2, Section 2.3 (Private ECS Operators) of the Funding Manual for School Authorities for information on the completion of this application.

Submit one copy of this application for each school/centre to School Finance

Name of School Jurisdiction/Private School/Society: _____

Name of School/Centre: _____

Address: _____

Postal Code: _____

Contact Person: _____

Telephone No: _____

E-Mail Address: _____

Fax No: _____

Number of Program Unit Children:
(claimed on this application)

Budget Amount:
(for this application)

\$

Have any of these Program Unit children been with a previous operator?

☐

YES

☐

NO

Has Basic Instruction funding been claimed for these children?

☐

YES

☐

NO

NOTE:

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

DECLARATION

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

- The parent(s) / guardian(s) of each child in this program unit is/are fully aware that special program plans are in place and that this application is being submitted on the child's behalf.
- Each child has been identified through screening and assessment carried out by community health nurses, parent(s) / guardian(s), teachers and/or child development specialists in accordance with criteria outlined in or Part 1, Section 1.6 or Part 2, Section 2.3 of the Funding Manual for School Authorities.
- Program goals for each child have been developed on the basis of recommendations arising from screening and assessment data.
- A program consistent with the special needs of each child will be undertaken by the teacher(s), assisted by appropriate support staff in the most enabling educational environment.
- Consultative assistance will be provided to staff and parent(s) / guardian(s) as required.
- Direct services will be provided to each child and/or parent(s) / guardian(s) as required.
- Case conferences will be held regularly to evaluate each child's progress and to decide on changes, where appropriate, in the program in consultation with the parent(s) / guardian(s).
- Long term plans for the child(ren) have been discussed with the receiving school authority(ies).

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

(Signature of Secretary-Treasurer)

(Date)

FOR DEPARTMENT USE:

APPROVED BY: _____
(Signature of Performance Certifier)
Special programs Branch

Amount Approved: \$ _____

(Signature of Expenditure Officer)
School Finance Branch

Date Approved: _____

In order for a diagnosis of autism to be made, the student/ECS child needs to demonstrate impairment in the following areas:

- Social interaction; and
- Communication; and
- Stereotyped pattern of behaviour (i.e. hand flapping, body rocking, echolalia, instance on sameness and resistance to change).

A student/ECS child diagnosed with severe Fetal Alcohol Spectrum Disorder (FASD) may have Fetal Alcohol Syndrome (FAS) or Alcohol-Related Neurodevelopmental Disorder (ARND) and is included in this category (Code 44 – Severe Physical or Medical Disability – Including Autism). A clinical diagnosis by a psychiatrist, chartered psychologist with specialized training, or medical professional specializing in developmental disorder is required. A clinical diagnosis of FASD is not necessarily sufficient to qualify under this category. Eligibility is determined by the functioning level of the student with FASD. Students/ECS children with severe FASD who exhibit significant impairment in the areas of social functioning, life skills, behaviour, learning, attention and concentration, will need extensive intervention and support.

DEAFNESS (Code 45)

A **funded student/funded child** with a profound hearing loss is one who:

- a) has a hearing loss of 71 decibels (dB) or greater unaided in the better ear over the normal speech range (500 to 4000 hertz (Hz)) which interferes with the use of oral language as the primary form of communication, or has a cochlear implant; and
- b) requires extensive modification and specialized educational supports; and
- c) has a diagnosis by a clinical or educational audiologist. New approvals require an audiogram within the past 3 years.

If a student/ECS child has a severe to profound sensori-neural hearing loss that has not changed significantly since the initial approval by Alberta Education, documentation from a qualified specialist in the field of deafness outlining the severity of the hearing loss and modifications to the learning environment may be sufficient to support eligibility.

BLINDNESS (Code 46)

A **funded student/funded child** with severe vision impairment is one who:

- a) Has corrected vision so limited that it is inadequate for most or all instructional situations, and information must be presented through other means; and
- b) Has visual acuity ranging from 6/60 (20/200) in the better eye after correction, to having no usable vision or field of vision reduced to an angle of 20 degrees.

If a student/ECS child has a severe to profound visual impairment that has not changed significantly since the initial approval by Alberta Education, documentation from a qualified specialist in the field of vision outlining the severity of the disability and modifications to the learning environment may be sufficient to support eligibility.

For those students/ECS children who may be difficult to assess (e.g. cortical blindness – developmentally delayed), a functional visual assessment by a qualified specialist in the field of vision or a medical professional may be sufficient to support eligibility.

SEVERE DELAY INVOLVING LANGUAGE (Code 47) – For ECS children only.

A child with a severe delay involving language is one who has difficulty communicating with peers and/or adults because of a severe delay in expressive, receptive or overall language. The following criteria determine eligibility in this category:

- a) a child who has sufficient communicative ability to permit formal speech/language assessment should demonstrate results less than or equal to the first percentile in expressive, receptive or total language. If formal language assessment is not possible, a parental report and/or observational measure may be used; or
- b) a child who has severe phonological delay and at least a moderate delay in expressive, receptive or overall language (on a formal assessment of language); or
- c) a child who has at least a moderate to severe delay in expressive, receptive or overall language delay (on a formal assessment of language) and at least a moderate to severe delay in one or more of the following areas of development: fine motor, gross motor, vision, hearing.

Alberta Education criteria for a severe delay involving language are based on a child's developmental profile, not on individual subtest scores in any single area of development. Eligibility documentation must include an assessment completed by a Speech and Language Pathologist that includes the results of measures used and a description of the child's communicative ability. In order to qualify, the language delays must have a significant impact on areas such as: functional language, social use of language, vocabulary, language concepts, mean length of utterance, grammar and acquisition of early literacy. If the child qualifies on the basis of a language delay in combination with delays in other areas, those areas of delay must be assessed by an appropriate specialist and must result in a significant impact on the child's ability to function in an ECS environment.

Assessment reports that were completed within six months of the day the child begins his/her program must be submitted to the Special Programs Branch for pre-approval of the child's eligibility or with the PUF application.

Clustering must be the first option considered when planning programming for these children. In most cases a 475 hours program is sufficient.

Children with moderate to severe delays in two or more non-associated areas (not including language) should be considered under Severe Multiple Disability (Code 43).

DETAILS of CHILDREN IN PROGRAM UNITS																		
	Alberta Student Number (ASN) #	Name of Child Surname/Given Name(s)	Age	Date of Birth			Location(s) of Child's Program (Including AM or PM)	R or N	Assessed Primary** Disability/Delay Code	Date Program Starts			Date Program Ends			Number of Centre Program Hours	Family-oriented ECS programming Sessions***	
			Dept Use Only	Yr.	Mo.	Day				Yr.	Mo.	Day	Yr.	Mo.	Day		Total # of Sessions	Total # of Session Hours
		FIRST PROGRAM UNIT																
1.																		
2.																		
3.																		
4.																		
5.																		
6.																		
		SECOND PROGRAM UNIT																
1.																		
2.																		
3.																		
4.																		
5.																		
6.																		
		THIRD PROGRAM UNIT																
1.																		
2.																		
3.																		
4.																		
5.																		
6.																		
		FOURTH PROGRAM UNIT																
1.																		
2.																		
3.																		
4.																		
5.																		
6.																		

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

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

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

*** Please show the total number of eligible family-oriented ECS programming sessions for the school year and the total number of hours these sessions comprise.

PROGRAM UNIT FUNDING (PUF) BUDGET for Regular ECS Programs

PLEASE SUBMIT A SEPARATE BUDGET FOR EACH UNIT

NAME(S) _____

PROGRAM UNIT COSTS

INSTRUCTIONAL COSTS

Salaries and Wages (# of hours _____ **X** _____ rate per hours) \$ _____
 (# of hours should not exceed the child's program hours by more than 10%)

Employer's Portion of Fringe Benefits \$ _____

Services Purchased (Please specify service with # of hours and rate per hour) \$ _____

_____	_____	X	\$	_____	_____
_____	_____	X	\$	_____	_____
_____	_____	X	\$	_____	_____
_____	_____	X	\$	_____	_____

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

PARENT INSERVICE – please specify _____ \$ _____

STAFF INSERVICE – please specify _____ \$ _____

TRANSPORTATION COSTS:

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

• Family-Oriented Programming # sessions _____ **X** \$ _____

• Other: - Field Trips _____

• In-Program Transportation _____

Total Transportation Costs _____ **(A)**

LESS: TRANSPORTATION REVENUES

Alberta Learning Special Needs Transportation Funding: (See Funding Manual, Part 2, Section 2.4 and 2.5 for Private ECS Operators and Part 1, Section 1.19 – 1.22 for School Jurisdictions.)

• Special Transportation # trips _____ **X** \$ 13.17 _____

• Regular Transportation # children _____ **X** \$ 458/yr _____

• Family-Oriented Programming Transportation # sessions _____ **X** \$ 13.17 _____

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

Total Transportation Revenues _____ **(B)**

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

CAPITAL COSTS (child specific only):

Furniture and Equipment: Please specify: _____ \$ _____

Note: Please attach, to this application, a letter of recommendation from an appropriate specialist supporting the capital purchase.

TOTAL PROGRAM UNIT COSTS \$ _____

Guidelines for the above expenditure areas are found in the Funding Manual, Part 1, Section 1.6 or Part 2, Section 2.3

DEPT. USE ONLY **CEILING AMOUNT** (based on program hours and # of in-home sessions) : _____

**TOTAL ECS PROGRAM BUDGET FOR
DESIGNATED SPECIAL EDUCATION ECS PROGRAM APPLYING FOR PROGRAM UNIT FUNDING (PUF)**

ECS PROGRAM COSTS

INSTRUCTIONAL COSTS

Salaries and Wages (Please provide breakdown of # of teachers, aides, etc and costs) \$ _____

Employer's Portion of Fringe Benefits \$ _____

Services Purchased (Please attach breakdown of type of service and cost) \$ _____

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

PARENT INSERVICE

\$ _____

STAFF INSERVICE

\$ _____

TRANSPORTATION COSTS:

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

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

• Other: - Field Trips _____

• In-Program Transportation _____

Total Transportation Costs _____ (A)

LESS: TRANSPORTATION REVENUES

Alberta Education Special Needs Transportation Funding: (See Funding Manual, Part 2, Section 2.4 and 2.5 for Private ECS Operators and Part 1, Section 1.19 – 1.22 for School Jurisdictions.)

• Special Transportation # trips _____ X \$ 13.17 _____

• Regular Transportation # children _____ X \$ 458/yr _____

• Family-Oriented Programming Transportation # sessions _____ X \$ 13.17 _____

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

Total Transportation Revenues _____ (B)

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

FACILITY COSTS (Please attach list of costs) \$ _____

ADMINISTRATION (Please attach a breakdown of costs) \$ _____

CAPITAL COSTS:

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

TOTAL PROGRAM UNIT COSTS \$ _____

LESS: APPLICABLE REVENUES

AB. Education Base Instruction \$ _____

Mild or Moderate \$ _____

Plant Operation and Maintenance \$ _____

AB. Education Other (please attach list) \$ _____

ECS Administration (private ECS operators only) \$ _____

Other Revenues (please specify) \$ _____

TOTAL REVENUES \$ _____

**NET ECS PROGRAM COSTS ELIGIBLE FOR PROGRAM UNIT FUNDING
(total costs minus total revenues)**

\$ _____

Guidelines for the above expenditure areas are found in the Funding Manual, Part 1, Section 1.6 or Part 2, Section 2.3

DEPT. USE ONLY CEILING AMOUNT (based on program hours and # of in-home sessions) :

**Program Unit Funding
PUF APPLICATION ADJUSTMENTS FORM
2005 - 2006 School Year**

NAME OF SCHOOL AUTHORITY: _____

NAME OF SCHOOL: _____

To be completed for PUF children who have left your program earlier than reported on your PUF application, please provide the following information so that your PUF budget and ceiling can be adjusted. (one form per unit)

Alberta Student Number (ASN): _____

Child's Name: _____

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

Number of Centre Program hours provided: _____

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

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

ESTIMATE OF ALL COSTS INCURRED: Please provide a breakdown by cost category (if child is in a cluster please provide revised budget for all children in the cluster)

Teacher Assistant Salaries/wages (# of hours _____ x _____ rate per hour) \$ _____

Employer's Portion of Fringe Benefits \$ _____

Services Purchased (Please specify service with # of hours and rate per hour) \$ _____

_____ (# of hours _____ x _____ rate per hour)

_____ (# of hours _____ x _____ rate per hour)

_____ (# of hours _____ x _____ rate per hour)

_____ (# of hours _____ x _____ rate per hour)

Supplies and Materials \$ _____

Parent In-service – Please specify _____ \$ _____

Staff In-service – Please specify _____ \$ _____

Transportation Costs:

• To and from school # trips _____ x \$ _____ \$ _____

• # of FOP sessions _____ x \$ _____ \$ _____

• Other: - Field Trips \$ _____

• In-Program Transportation \$ _____

Total Transportation Costs \$ _____

Capital Costs: \$ _____

Total PUF Costs: \$ _____



HIGH SPEED NETWORKING FUNDING APPLICATION

For the school Year: September 1, 2005 to August 31, 2006

Name of School Authority: _____

Authority Code: _____

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

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

CERTIFICATION

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

(Signature of: Secretary-Treasurer/Superintendent)

(Date)

Approved by _____
(STB)

(Date)

INSTITUTIONAL PROGRAMS Funding Application Form 2005/2006

For the School Year: September 1, 2005 to August 31, 2006

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 2005/2006

NAME OF PROGRAM: _____

CONTACT PERSON: _____ **TELEPHONE:** _____

Please see Instructions (attached) for completion of this form. Also see Section 6.1 of the 2005-2006 Funding Manual for School Authorities. Note: If your program 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 rate \$ _____ \$ _____ For Budgets, use an estimate of Sept 30 enrolments. 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 2005-2006 Budgets, please use monthly enrolments for the 2004-2005 school year. For 2005-2006 Finals, please use monthly enrolments for the 2005-2006 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.

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

Instructions for Completion of 2005-2006 Institutional Funding Applications

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

1. Instructional Salary Costs

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

2. Supplies and Services Costs

- a. Professional Development: staff training, conferences, & in-services
- b. Educational Supplies: materials & resources which students/teachers require for the educational program, such as; textbooks, notebooks, videos, pens/pencils etc.
- c. Educational Services: costs for educational or psychological assessments directly related to providing the educational program such as; reading, math, I.Q., fine motor/gross motor
Note: Counseling, therapy or psychiatric services are not to be included in this category as these are the responsibility of the government agency operating the institution.
- d. Office Supplies: materials for the administration of the school program such as; paper, pens, binders, files.
Note: Office capital equipment such as audio-visual equipment, copiers, staff computers, furniture, fixtures for the classroom or office are **not** to be included in this category as these costs are the responsibility of the government agency operating the institution.

3. Technology Costs

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

- a. Actual costs
- b. (i) For regular institutional programs that have only institutional students, \$500 X the average number of students enrolled (line D of the budget form).
(ii) For mixed programs (i.e., programs with institutional students and non-institutional students), \$500 X the average number of institutional students enrolled (line D of the budget form).
- c. Maximum of \$10,000 total per year. Requests over the maximum amount require prior approval from the Education Manager for Institutions at the Special Programs Branch.

Revenues: Please list the Base Instruction revenues you received (or plan to receive) for the institutional students who were enrolled on September 30 (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 2005-2006 Budgets, please use monthly enrolments from the 2004-2005 school year. For 2005-2006 Finals, please use monthly enrolments for the 2005-2006 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 2005/2006

NAME OF PROGRAM: _____

CONTACT PERSON: _____ **TELEPHONE:** _____

Please see Instructions (attached) for completion of this form. Also see Section 6.1 of the 2005-2006 Funding Manual for School Authorities. Note: If your program only has institutional students (and non-institutional students), you are considered a Regular Institutional Program and must complete the form for a Regular Institutional Program 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
Average number of students enrolled (see guidelines for this calculation)			_____ B
Average costs per student (A ÷ B)		\$	_____ C
Average number of Institutional students enrolled (see guidelines)			_____ D
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 rate _____		\$	_____
For Budgets, use an estimate of Sept 30 enrolments. For Final Costs, use actual Sept 30 enrolments			
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 2005-2006 Institutional Funding Applications

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

1. Instructional Salary Costs

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

2. Supplies and Services Costs

- a. Professional Development: staff training, conferences, & in-services
- b. Educational Supplies: materials & resources which students/teachers require for the educational program, such as; textbooks, notebooks, videos, pens/pencils etc.
- c. Educational Services: costs for educational or psychological assessments directly related to providing the educational program such as; reading, math, I.Q., fine motor/gross motor
Note: Counseling, therapy or psychiatric services are not to be included in this category as these are the responsibility of the government agency operating the institution.
- d. Office Supplies: materials for the administration of the school program such as; paper, pens, binders, files.
Note: Office capital equipment such as audio-visual equipment, copiers, staff computers, furniture, fixtures for the classroom or office are **not** to be included in this category as these costs are the responsibility of the government agency operating the institution.

3. Technology Costs

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

- a. Actual costs
- b. (i) For regular institutional programs that have only institutional students, \$500 X the average number of students enrolled (line D of the budget form).
(ii) For mixed programs (i.e., programs with institutional students and non-institutional students), \$500 X the average number of institutional students enrolled (line D of the budget form).
- c. Maximum of \$10,000 total per year. Requests over the maximum amount require prior approval from the Education Manager for Institutions at the Special Programs Branch.

Revenues: Please list the Base Instruction revenues you received (or plan to receive) for the institutional students who were enrolled on September 30 (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 2005-2006 Budgets, please use monthly enrolments from the 2004-2005 school year. For 2005-2006 Finals, please use monthly enrolments for the 2005-2006 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

For the School Year: September 1, 2005 to August 31, 2006

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	\$ _____	\$ _____
▪ Other – please specify	\$ _____	\$ _____
Total Expenditures	\$ _____	\$ _____
SUPLUS/(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, 2005
(in whole dollars)

CONSORTIUM NAME: _____

	<u>Actual 2005/2006</u>	<u>Budget 2005/2006</u>	<u>Actual 2004/2005</u>
REVENUES			
Alberta Education:			
Management & Infrastructure (Note 1)	_____	_____	_____
Programming Grants (Note 2)	_____	_____	_____
(Specify) e.g. Special Education	_____	_____	_____
(Specify) _____	_____	_____	_____
(Specify) _____	_____	_____	_____
(Specify) _____	_____	_____	_____
(Specify) _____	_____	_____	_____
Other Alberta Education	_____	_____	_____
Other Revenue:			
Program Registration (Note 3)	_____	_____	_____
Grants – Non Government Sources (Note 4)	_____	_____	_____
Other (Note 5)	_____	_____	_____
(Specify) _____	_____	_____	_____
(Specify) _____	_____	_____	_____
TOTAL REVENUES:	_____	_____	_____
EXPENSES			
Management & Infrastructure (Note 6):			
Salaries, Wages, Benefits, Contracts and Other Fixed Over Heads (Note 7)	_____	_____	_____
Board Expenses (Note 8)	_____	_____	_____
Programming:			
Costs of Delivering Programs (Note 9)	_____	_____	_____
Other:			
(Specify) _____	_____	_____	_____
(Specify) _____	_____	_____	_____
TOTAL EXPENSES:	_____	_____	_____
REVENUES less EXPENSES (Note 16)	_____	_____	_____
Accumulated Surplus at beginning of year:	_____	_____	_____
Accumulated Surplus at end of year:	_____	_____	_____

REGIONAL CONSORTIUM
Statement Of Financial Position
As At August 31, 2006
(in whole dollars)

CONSORTIUM NAME: _____

	<u>Actual 2005/2006</u>	<u>Actual 2004/2005</u>
ASSETS		
Cash in Bank and Temporary Investments	_____	_____
Accounts Receivable (Note 10):		
Province of Alberta	_____	_____
Alberta School jurisdictions	_____	_____
Other	_____	_____
Prepaid Expenses (e.g. Deposits for Programming)	_____	_____
Other Assets	_____	_____
TOTAL ASSETS:	_____	_____
LIABILITIES		
Accounts Payable	_____	_____
Accrued Liabilities (Note 11)	_____	_____
Deferred Revenues		
Programming Grants (Note 2)		
(Specify) e.g. Special Education	_____	_____
(Specify) _____	_____	_____
(Specify) _____	_____	_____
(Specify) _____	_____	_____
(Specify) _____	_____	_____
Prepaid Registration (Note 12)	_____	_____
Other:		
(Specify) _____	_____	_____
(Specify) _____	_____	_____
Total Deferred Revenues	_____	_____
TOTAL LIABILITIES:	_____	_____
ACCUMULATED SURPLUS		
Operational Reserves (Note 13)	_____	_____
Unrestricted Funds (Note 14)	_____	_____
TOTAL ACCUMULATED SURPLUS (Note 15)	_____	_____
TOTAL LIABILITIES AND ACCUMULATED SURPLUS	_____	_____

General Notice: It is suggested that each consortium keep a separate account in it's ledger for each programming grant, posting all receipts and expenses to this account. Any credit balance at the end of the year will represent the unexpended funds, to be adjusted out of this account to deferred revenue. For Financial Statement purposes, the grant revenue will be calculated by adding up the credits (deducting the deferred revenue adjustment) and the expenses by adding up the debit entries (except for the deferred revenue adjustment)

**REGIONAL CONSORTIUM
Financial Statements
CERTIFICATION
For the Year Ended August 31, 2006**

CONSORTIUM NAME: _____

I certify that to the best of my knowledge, the information detailed on forms 1 and 2 (attached) is correct.

(Signature) Chair of Consortium

(Signature) Financial Officer

Date

Date

NOTES

- Note 1** Management and Infrastructure grant from Alberta Education (total amount allocated for the year)
- Note 2** The grant revenue on page 1 represents the amount of the grant expended during the current year, including any amount expended that was carried forward from previous years.
The deferred revenue on page 2 represents funding deferred to future years when it will be matched with the expenditures.
- Note 3** Registration rates are intended to cover the direct costs reported as programming expenses.
- Note 4** E.g. grants and subsidies from private partnerships (Shaw).
- Note 5** Funding from other provincial government departments or the Federal government; bank interest reported should be placed in this section as well.
- Note 6** Costs of operating and maintaining the consortium office.
- Note 7** Including Executive Director, Executive Assistant and office staff. Fixed overheads include office space, utilities, office supplies and equipment.
- Note 8** Including meeting fees, supplies, travel and subsistence and board development.
- Note 9** Including part-time and contracted staff (e.g. program host, presenters, registration staff) and other direct costs including materials, site, audio-visual, catering, etc.
- Note 10** Amounts owed to the consortium but not received in pertaining to the current year.
- Note 11** E.g. Unpaid wages pertaining to the year
- Note 12** Pertaining to programming planned for subsequent year(s).
- Note 13** Board-approved funds earmarked for future operations or programming.
- Note 14** Unrestricted Funds represent the net assets (total assets minus total liabilities) less any operational reserves for earmarked programming.
- Note 15** Accumulated Surplus is the total of operational reserves and unrestricted funds.
- Note 16** Please ensure that any over-expenditure is offset by sufficient Accumulated Surplus at the beginning of the year.

[illegible]

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

ACTIVITY PROGRAM means a co-curricular activity outside of, but usually complimentary to, the regular curriculum and offering a high standard of professional training. This activity should be one requiring intensive training of the student.

ALTERNATIVE FRENCH LANGUAGE PROGRAMS means a program offered under Sections 11 and/or 21 (1)(a) of the *School Act* where French is used as the language of instruction.

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

This is commonly referred to as French Immersion Programs.

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

BLENDED PROGRAM means an educational program consisting of two distinct parts:

1. A **school**-provided program where a teacher employed by a **school board** or accredited **private school** is responsible for providing the delivery and evaluation of courses; and
2. A Home Education Program that meets the requirements of the *Home Education Regulation*.

BOARD means the board of trustees of a **school jurisdiction**.

CENTRE-BASED ECS PROGRAMMING means the instructional program hours (based on **Individualized Program Plan** goals) provided to a **child with a severe disability/delay** in a classroom setting at a **school** or centre during a typical school year of September to June. Programming that is delivered to a **child with a severe disability/delay** primarily or exclusively in the home by a teacher assistant (under the direction of a certificated teacher) is also considered to be **centre-based ECS programming**. **Centre-based ECS programming** is often combined with **family-oriented ECS programming** to provide a comprehensive program (see definition of **Family-Oriented ECS Programming** in the Glossary of Terms).

New

CHALLENGE ASSESSMENTS for the purpose of claiming credit enrolment units (CEUs) are available for high **school** courses. Local **school authorities** may use **challenge assessments** to provide students with a means of receiving credits and a final mark for courses in which they already possess the knowledge, skills and attitudes identified in the program of studies and when this assessment is in the student's best interests.

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

CHARTER SCHOOL means a **school** established under Section 32 of the *School Act* and operated as per Section 34 of the *School Act*.

For the 2005-2006 school year, the following **charter schools** have been approved:

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

CHILD(ren) WITH A DISABILITY/DELAY means a **funded child(ren)** who is assessed and coded as having a mild, moderate or severe disability/delay.

CHILD(ren) WITH A MILD OR MODERATE DISABILITY/DELAY means a **funded child(ren)** who is assessed as having a mild or moderate cognitive disability, visual impairment, hearing impairment, emotional/behavioural disability, physical or medical disability, multiple disability, or communication delay.

CHILD(ren) WITH A SEVERE DISABILITY/DELAY – means **funded children** who have been identified as having a severe disability/delay according to the definitions and categories listed under the definition for **students with a severe disability**.

CHILD(ren) WITH SPECIAL NEEDS means a **funded child(ren)** who is assessed and coded as having a mild, moderate or severe disability/delay or who is gifted and talented. These children require an adapted or modified educational program to meet their exceptional needs. **The Individualized Program Plan (IPP)** provides documentation of the programming and is a mandatory requirement for any **child with special needs**.

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

New

Revised

COUNT DATE is used to determine eligibility for funding and refers to the specific date on which students and/or children should be counted. If the **count date** is September 30, only those enrolled on that date can be included in the count. If the **count date** of September 30 falls on a weekend, the last **school** day of September shall be used as the **count date**.

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

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

Updated

DESIGNATED SPECIAL EDUCATION ECS PROGRAM means an **ECS program** in which at least 70 percent of the **funded children** served have a severe disability/delay. **ECS programs** with this designation may include **children with mild or moderate disabilities/delays** and/or regular **ECS funded children**, totaling a maximum of 30 percent of their ECS population. The following programs have been approved for this status:

School Jurisdictions

- Black Gold Regional Division #18
- Calgary School District #19
- Edmonton School District #7

Schools

- East Elementary Early Entry Program (3214)
- Ecole Bellevue (3201)
- James Short Memorial School (Early Development Centre) (9364)
- Richmond School (9100)
- Queen Elizabeth Elementary (9227)
- Beacon Heights School (7106)
- Elmwood School (7204)
- Evansdale School (7215)
- Glenrose Hospital (7701)
- Hazeldean School (7132)
- Homesteader School (7240)
- Mayfield School (7209)
- Scott Robertson (7171)

- Edmonton Catholic Separate School District #7
- Elk Island Public School Regional Division #14
- Grande Prairie School District #2357
- Greater St. Alberta Catholic Regional Division #29
- Medicine Hat School District #76
- Medicine Hat Catholic Separate Regional Division #20
- Northern Lights School Division #69
- Parkland School Division #70
- Pembina Hills Regional Division #7
- Red Deer School District #104
- Rocky View School Division #41
- Wetaskiwin Regional Division #11
- Tevie Millar Heritage School (7772)
- Waverley School (7189)
- St. Gabriel School (Hand in Hand Education through experience) (8217)
- REACH Program
- Crystal Park Pre-School Program (1150)
- Vital Grandin School (2578)
- Herold Pre-School (6849)
- Riverside School (6853)
- Elm Street School (6848)
- St. Louis Early Dev. Program (6872)
- Vera M. Welsh School (2704)
- Broxton Park School (2228)
- Westlock Elementary Early Ed. Program (2413)
- Fairview School (4440)
- Grandview School (4441)
- G. W. Smith School (4442)
- Preschool Intervention Program (PIP)
- Wetaskiwin Early Ed. Centre (WEEC)

Designated ECS Programs at Private ECS Operators

- *Calgary Quest Children's Society (5398)
- Children's Services Centre – Red Deer (0289)
- Community Options (0151)
- Connect Society DEAF Services (0658)
- Cause & Effect (0274)
- Department of Speech Pathology and Audiology U of A (1032)
- *Elves Special Needs Society (0655)
- Family Linkages (0344)
- GRIT Calgary (0284)
- GRIT Society of Edmonton (formerly H.O.M.E.S.) (9887)
- New Heights Early Education Services (0432)
- PACE Kids (0302)
- Providence Child Development Centre
- *Renfrew Educational Services
 - Renfrew – Centre (0249)
 - Renfrew – South (0250)
 - Renfrew – Bowness (0280)
 - Renfrew – Falconridge (0281)
 - Renfrew – Special Services (0437)
- Salvation Army Children's Village (0244)
- Society for the Treatment of Autism (0212)
- The Heartland Agency (0285)
- The PREP Program (0230)

**designated ECS program is at a Private School*

DESIGNATED SPECIAL EDUCATION PRIVATE SCHOOL (DSEPS) is a **private school** given special approval and funding by Alberta Education where the sole purpose of the **school** is to serve students with identified special needs, and all students who are enrolled in the **school** are diagnosed with a mild, moderate, or severe disability. The educational programs provided to the students require modifications or adaptations to the *Program of Study*, and are specified in the **Individualized Program Plan (IPP)** developed and implemented for each student;

For the 2005/2006 school year the following **schools** are in this category:

- Calgary Quest Children's Society (9795)
Calgary Quest School (5398)
- The Calgary Society for Effective Education of Learning Disabled (9131)
Calgary Academy (9908)
- Edmonton Academy Society for Learning Disabled (9172)
Edmonton Academy (7953)
- Elves Special Needs Society (9263)
Elves Child Development Centre (0655)
- Foothills Academy Society (9107)
Foothills Academy (9917)
- Horizon School Committee (9031)
Horizon School Special Education (5191)
- Integro Youth Counseling Services (0013)
The Skill Factory (0016)
- Janus Academy Society (0025)
Janus Academy (0032)
- Parkland Community Living and Supports Society (9027)
Parkland School Special Education (4493)
- Renfrew Educational Services Society (9672)
Renfrew – Centre (0249)
- Rundle College Society (9230)
Rundle College Academy (5297)
- Third Academy International Ltd. (0023)
The Third Academy – Calgary (0031)
The Third Academy – Red Deer (0477)
The Third Academy – Lethbridge (0522)

DEVELOPMENTALLY IMMATURE means an individual who is eligible to enter Grade one (based on the **school** entrance age policy of the **school jurisdiction**) and less than 7 years old on September 1, who is enrolled in an **ECS program** because the **parent** and the **school jurisdiction** agree that an **ECS program** is the most appropriate placement for the child. In this situation the individual is counted as a **funded child**. If the individual is in a program that involves both ECS and Grade one instruction, he/she may be counted either as a **funded child** or as a **funded student**. A **developmentally immature** individual is not considered to have special needs and should not have been identified as having special needs in prior years. If the individual has special needs then the individual is counted as a **funded student**.

DISTANCE is the term used in Rural Transportation Block funding. **Distance** refers to the **eligible transportation distance** from where each **eligible passenger** resides to their **designated school** or **school** of choice, whichever is closest.

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

EARLY CHILDHOOD SERVICES (ECS) OPERATOR for funding purposes means a **board** or a **private ECS operator** that has been approved to provide an **ECS program**.

ECS HOME PROGRAM means an **ECS program** (kindergarten) delivered by an **ECS operator** in the home of a regular ECS child (not one with special needs) who lives in a remote area where there is no ECS **school** program within a reasonable transportation **distance**. A certificated teacher must plan, deliver and evaluate the **ECS home program**. Twenty-two visits for a minimum of 1.5 hours each are considered equivalent to a basic 475-hour kindergarten program. The **ECS home program** must be approved by Alberta Education. The frequency, setting, and structure of an **ECS home program** must be determined in consultation with **parents**.

An **ECS home program** is not a home-education kindergarten program and it is not **family-oriented ECS programming**.

EARLY CHILDHOOD SERVICES (ECS) PROGRAM means an education program provided pursuant to Section 30 of the *School Act*.

EDUCATIONAL SERVICES AGREEMENT means an agreement or a portion of an agreement entered into by a **school jurisdiction** under Section 62 of the *School Act* to educate students under its authority on a full-time basis. Examples of this would be tuition agreements, sponsorship agreements, and **transportation agreements**.

EFFECTIVE TRANSPORTATION AREA for the purposes of Rural Transportation Block funding means the total area in square miles in a **district** or **division** 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**;

but 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.

ELIGIBLE PASSENGER for purposes of Student Transportation funding refers to an individual who is transported under Section 51 of the *School Act* and the *Student Transportation Regulation* or required to be transported to and from **school** under Section 51 of the *School Act* and the *Student Transportation Regulation* and is enrolled in a **school** of the **board**, as follows:

1. An employee of the **school jurisdiction** accompanying a **student with a disability** or a **child with a disability/delay** in a program unit who is transported to and from **school**;
2. A **funded student** who:
 - a) resides within the boundaries of a **school jurisdiction** and attends a **school** operated by that **board**; or
 - b) resides within the boundaries of a **school jurisdiction** and attends a **school** operated by another **board** with which the **school jurisdiction** has an **education services agreement** for that student; or
 - c) resides within the boundaries of another **school jurisdiction** with which the **board** has an existing **transportation agreement** for that individual or who has been admitted to a **school** operated by another **board** and is transported within the boundaries of that **board**; or
 - d) resides in **unorganized territory** and attends a **school** operated by a **board** adjacent to the **unorganized territory**; or
 - e) resides in **unorganized territory** and attends a **school** operated by a **board** or **private school** with which the **school jurisdiction** adjacent to the **unorganized territory** has an existing **transportation agreement**; and
 - f) resides at least 2.4 kilometres (by the most direct route on a **highway**) from the **school** that the individual has been directed to attend pursuant to Section 45(2) of the *School Act*; and
 - g) resides at least 2.4 kilometres (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 kilometres (by the most direct route on a **highway**) from the **school** that individual attends;
3. A **student with a disability/delay** requiring transportation to and from **school** and who is unable to walk to **school** as the result of a disability/delay;
4. A **funded student** who is transported by horse drawn vehicle to the **school** which the student has been directed to attend; or
5. A **funded student** who resides within the boundaries of a **school jurisdiction** and attends a **private school** with which the **school jurisdiction** has an **education services agreement**.

ELIGIBLE STUDENT as defined in the Alberta School Foundation Fund (ASFF) Regulation (ASFF) means a student who:

1. On September 30, meets the requirement of Section 8(1)(b) of the *School Act*;
2. Either has a **parent** who ordinarily resides in Alberta or is an **independent student** who ordinarily resides in Alberta;
3. Is enrolled in and is attending a **school** operated by a **board**;
4. Is at least 5 years 6 months but less than 20 years of age on September 1 of the year which the student is counted;
5. Is not a student enrolled in a **home education program**;
6. Is not a **funded child** to whom an **early childhood services program** is being provided pursuant to Section 30(1)(a) of the *School Act*; and
7. Is not a **First Nations student with status who lives on a reserve** pursuant to the *Indian Act* (Canada).

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

ELIGIBLE TRANSPORTED ECS CHILD is a **funded child** who resides at least 2.4 kilometres from the **ECS program** and who is transported to the **ECS Program**. This distance limit does not apply to children who are funded through Special Transportation funding.

EXPECTED ELIGIBLE PASSENGER is a term used in Section 1.22 – Metro Urban Transportation funding and refers to the estimated number of **eligible passengers** calculated on the basis of enrolment and a number of factors which affect eligibility for transportation.

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

Family-oriented ECS programming is not intended to be the only form of programming a child receives but rather is intended to enhance the child's **centre-based ECS programming** as outlined in his/her **IPP** (see definition of **Centre-Based ECS Programming** in the Glossary of Terms)

For funding purposes, **family-oriented ECS programming** is claimed as sessions, where a session is defined as a minimum of 1.5 hours. A session involving more than one child and their **parent(s)** may be pro-rated based on the number of children and **parents** involved in the session and the length of session (minimum 45 minutes). Note: intervention provided by a member(s) of the child's learning team to the child must involve the **parent/caregiver** in order to be counted as an eligible **family-oriented ECS programming** session. See the Program Unit Funding section of this Funding Manual for more details on how to properly count sessions and what conditions apply for this type of programming.

FIRST NATIONS CHILD/STUDENT WITH STATUS WHO RESIDES ON A RESERVE is a person registered under the *Indian Act* who lives on a reserve. These children/students are funded by the Government of Canada.

FRANCISATION means a program that assists students attending Francophone **schools** who do not have sufficient French language skills to succeed in **school**. Francisation programs are similar to ESL programs that assist students attending English-speaking **schools** who do not have sufficient English language skills to succeed in **school**.

FRANCOPHONE EDUCATION PROGRAM means a program operated by a **Francophone Regional authority** under Section 10 of the *School Act*.

FRANCOPHONE REGIONAL AUTHORITY means a Regional Authority for a Region established by the **Minister** under Section 255 of the *School Act*.

FRENCH AS A SECOND LANGUAGE (FSL) means a program or course offered under Section 39 of the *School Act*.

FRENCH FIRST LANGUAGE (FRANCOPHONE) EDUCATION means an education program offered under Section 10(1) of the *School Act* for individuals with rights under Section 23 of the *Canadian Charter of Rights and Freedoms* to receive **school** instruction in French.

FROZEN FUNDED STUDENT COUNT is a snapshot of the September 30 **Funded Student** Count as it stands on the last business day in May each year. This count includes any add/modify/deletes and cleared priority **school** conflicts that are processed by School Finance to the last business day in May each year.

FUNDED CHILD means an individual who:

Updated

- a) Is attending an **ECS program** on September 30 of the current school year operated by a **school authority** or by the Government of Canada or any agency of the Government of Canada or the council of a band as defined in the *Indian Act (Canada)* or any agency established by a council or a band or councils of bands with which an Alberta **school jurisdiction** has an agreement under Section 62(2)(b) and (c) of the *School Act*; and
- b) Meets the minimum age requirements as set out in the following table*:

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

Note: a **funded child** is eligible for up to 3 years of funding in total (as indicated in the above chart).

***ECS operators** need to take into consideration the Grade one **school** entrance age in the community when enrolling children in an **ECS program**. **Children with severe disabilities/delays** will be funded for a maximum of three years while they are of ECS age. **Children with a mild or moderate** disability/delay and children who are gifted and talented will be funded for a maximum of two years while they are of ECS age; and

- c) Has a **parent** who ordinarily resides in Alberta; and
- d) Is a Canadian citizen; 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

This definition of a funded child does not include a **First Nations child with status who resides on a reserve**.

An individual who is at least 5 years 6 months but less than 6 years of age on September 1 may be counted as a **funded child** (rather than as a **funded student**) if the **school jurisdiction**, the **ECS operator** and the **parent** agree that an **ECS program** is the most appropriate placement and if one of the following applies.

- a) The child has spent less than the number of years in the program for which they are eligible for funding, i.e. has received less than three years of Program Unit Funding (PUF),
- b) The child has not enrolled in an **Early Childhood Services (ECS) Program** prior to this age; or
- c) The child has been assessed as developmentally immature (Code 10)

An individual who is 6 years or older, but less than 7 years old on September 1, who is in an **ECS program** and who is **developmentally immature**, or who is a **funded child** entering an **ECS program** for the first time, is to be counted as a **funded child**. A **developmentally immature** individual is not considered to have special needs and should not have been identified as having special needs in prior years. If the individual has special needs then the individual is counted as a **funded student** for funding purposes.

FUNDED ACCREDITED PRIVATE SCHOOL means an accredited **private school** as defined in Section 28(2) of the *School Act* receives a grant under the *Learning Grants Regulation*.

FUNDED STUDENT means an individual who:

1. Is attending a **school** or a **blended program** in Grades 1 to 12 on September 30 of the current school year;
 - a) operated by a **school jurisdiction** or the governing body of a **funded accredited private school**; or
 - b) in another province operated by a board of trustees or similar governing body of a publicly funded school or separate board or a person with which the Alberta **school jurisdiction** has an agreement under Section 62(1) or (2) of the *School Act* for the individual because he/she is a **resident student** of the **school jurisdiction** or a Charter Section 23 student represented by a **francophone regional authority**; or
 - c) operated by the Government of Canada or any agency of the Government of Canada or a council of a band as defined in the *Indian Act* (Canada) or any agency established by a council of a band or councils of bands with which the Alberta **school jurisdiction** has an agreement under Section 62(2)(b) or (c) of the *School Act* for the individual because he/she is a **resident student** of the **school jurisdiction**; or
 - d) in another province or country under a **reciprocal exchange program** approved by Alberta Education with a student from that respective province or country; and

2. Is at an age on September 1 in the school year in which he/she is counted, as follows:
 - a) at least 5 years 6 months of age and is eligible to enter Grade 1 according to the school entrance age policy of the **school jurisdiction** that enrolls the student, but less than 20 years of age; or
 - b) less than 5 years 6 months of age, is enrolled in Grade 1, and has previously attended an **Early Childhood Services (ECS) program** outside of Alberta that meets the learner expectations of the Kindergarten Program Statement; or
 - c) 6 years but less than 7 years of age and who has a mild, moderate or severe disability/delay and requires another year of ECS; or
3. is a Canadian citizen; or
 - a) lawfully admitted to Canada for permanent residence;
 - b) a child of a Canadian citizen; or
 - c) a child of an individual who is lawfully admitted to Canada as a permanent or **temporary resident**; and
4. Has a **parent** who ordinarily resides in Alberta (*School Act*, Section 273), or is an **independent student** who ordinarily resides in Alberta; and
5. Is not a **First Nations student with status who lives on a reserve** enrolled in a **school** operated by a **school jurisdiction** or the governing body of a **funded accredited private school**; and
6. Is not a **home education student**.

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

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

HOME EDUCATION STUDENT means an individual who:

1. Meets the requirements of the *Home Education Regulation* (AR126/99); and
2. Is under the supervision of a **school jurisdiction** or a **funded accredited private school** and living in Alberta on September 30; and
3. Is at least 5 years and 6 months or older and eligible to enter Grade 1 according to the **school** entrance age policy of the **school jurisdiction**, but less than 20 years of age on September 1 in the school year in which he/she is counted; and
4. Is a Canadian citizen; or
 - a) lawfully admitted to Canada for permanent residence;
 - b) a child of a Canadian citizen; or
 - c) a child of an individual who is lawfully admitted to Canada for permanent or temporary residence; and
5. Has a **parent** who ordinarily resides in Alberta, or is an **independent student** who ordinarily resides in Alberta; and
 - a) Is not counted by another **school jurisdiction** or **funded accredited private school** for Base Instruction funding, or an **ECS operator** under the *Learning Grants Regulation* (A.R.77/2003); and
 - b) Is taking a program in Grades 1 to 12 (ECS age children are not eligible).

HOME VISIT – See FAMILY-ORIENTED ECS PROGRAMMING

INDEPENDENT STUDENT means a student under Section 1(1)(m) of the *School Act* who is:

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

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

The **IPPs** of students/children with special education needs includes:

1. Assessment data;
2. Current level of performance and achievement;
3. Identification of strengths and areas of need;
4. Measurable goals and objectives;
5. Procedures for evaluating student progress;
6. Identification of coordinated support services (including health-related), if required;
7. Relevant medical information;

8. Required classroom accommodations (e.g. any changes to instructional strategies, assessment procedures, materials, resources, facilities or equipment;
9. Transition plans; and
10. Year-end summary.

IN THE CUSTODY OF A DIRECTOR under the *Child, Youth and Family Enhancement Act* means a student who is in custody by agreement, or in temporary custody, or in permanent custody.

INSTITUTION means any secure residence prescribed by the **Minister** of Education as an **institution** and operated or approved by the government where staff are paid a salary to provide lodging and care on a 24 hour basis for the individuals in residence, and which is not currently provided for under the terms and conditions of foster **parent** agreements with the Province of Alberta. **Resident students of the government** attend the **school** program on site or in a facility for which the government department controlling the **institution** is legally responsible. **Resident students of the government** who reside in an **institution** have been placed there:

1. For medical treatment in a hospital or other treatment facility; or
2. Through a court order or agreement under the *Child, Youth and Family Enhancement Act*; or
3. For protection and/or care by:
 - a) Alberta Children's Services; or
 - b) Alberta Health and Wellness; or
 - c) Alberta Solicitor General; or
4. As residents of a women's shelter because of a situation where there is need for protection from physical, psychological or sexual abuse.

Funded students in an **institution** must be **resident students of the government** as defined in Section 44(7) of the *School Act*.

SCHOOL AUTHORITIES APPROVED TO PROVIDE AN EDUCATIONAL PROGRAM IN AN INSTITUTION (School Code)

Battle River RD No. 31

Camrose Women's Shelter (4554)
Community Connections (1179)

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 also)
Westview YOC (9687)
William Roper Hull School (9033)
Women's Emergency Shelter

Chinook's Edge School Division

Grimmon House (1058)

Edmonton Catholic Sch. District No. 7

AADAC Treatment Centre

Edmonton School District No. 7

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

Elk Island PSD No. 14

A Safe Place (3343)

Foothills SD No. 38

Stampede Boys Ranch (5391)

Fort McMurray Catholic No. 32

Youth Treatment Centre (1871)

Grande Prairie SD No. 2357

Grande Prairie YOC (Bear Creek School)
(1148)

Holy Family CSRD No. 37

St. Francis Holistic Education Centre (YAC)
(1619)

Lakeland RCSSD No. 150

Dr. Margaret Savage Crisis Centre (2916)

Lethbridge SD No. 51

Harbour House (6459)
Hospital Program (6453)
Pitawani (6456)

Northern Lights SD No. 69

Lac La Biche YAC (2716)
Bright Bank Academy

Parkland School Division No. 70

Garden Valley Road School

Peace Wapiti School Div No. 76

Clairmont Group Home (1056)
Rycroft School (1055)
Sexsmith Group Home (1055)

Red Deer School Dist No. 104

Direwood Treatment Centre (4461)
Oskayak Treatment Centre (4469)
Parkland Youth Homes (44640)
Red Deer Hospital Program (0574)
Red Deer Youth Assessment Centre (4457)
Red Deer Pilot Treatment Centre

Sturgeon SD No. 24

Oak Hill Boys Ranch (2509)

Wild Rose School Division No. 66

Kootenay School (4111)

Wolf Creek RD No. 72

Alberta Hospital Ponoka (4299)
Twin Oaks (1040)

Updated

MINISTER means the **Minister** of Education.

ON-LINE PROGRAM is an educational program offered by a **school authority** and delivered electronically to a student at a **school** site or off-site, under the instruction and supervision of a certificated teacher of a **board** or **funded accredited private school**. For full student funding, elementary and junior high students must have access to 950 hours of instruction and senior high students must have access to 1000 hours of instruction.

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

OTHER LANGUAGE IMMERSION PROGRAMS means a minimum of 25 percent of the instructional time to a maximum of 50 percent of instructional time uses a language other than French or English as the language of instruction. This includes all grade levels.

OUTREACH PROGRAM means a program offered by a **school** which provides a basic education developed for **funded students** who are unable to attend or benefit from a regular **school** program. The requirements of the program are detailed in the Outreach Program Policy 1.1.4.

An **outreach program** must be offered in a stand-alone facility.

PARENT means, with respect to a student, the relevant individual under Section 1(2) of the *School Act* unless otherwise specified.

PRIVATE EARLY CHILDHOOD SERVICES (ECS) OPERATOR means a society registered under the *Societies Act*, a non-profit company registered under Part 9 of the *Companies Act*, or a non-profit corporation incorporated by, or under, an act of the Legislature, or a **funded accredited private school**; that

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

PRIVATE SCHOOL means a **school** registered under Section 28 of the *School Act*.

PUBLIC TRANSIT SYSTEM refers to a bus or light rail system owned, operated or contracted by a city, town, village or hamlet which offers service to the public within its boundaries. Taxis and/or bussing systems designed for disabled individuals are not considered public transit.

RECIPROCAL EXCHANGE PROGRAM means a recognized program under which a student who is an Alberta **resident student** is partnered or paired with a student who is a resident of another province or country. The same **school authority** that sends the partnered Alberta **resident student** on the exchange must also receive the partnered student from another province or country either in the same school year or in the subsequent school year.

Updated

RESIDENT BOARD means the **board** of the district or **division** of which a student is a **resident student**.

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

RESIDENT STUDENT OF THE GOVERNMENT means a student as defined in Section 44(7) of the *School Act* who is entitled to have access to an education program.

ROUTE DISTANCE is a term used in conjunction with rural transportation and means:

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

RURAL DISTRICT means a district or **division** that is not an **urban district**.

SCHOOL means a structured education environment through which an education program is offered to a student by:

1. A **board**;
2. A **charter school**;
3. A **private school**;
4. An **Early Childhood Services (ECS) private operator**;
5. A **parent** providing a home education program;
6. The **Minister**.

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

SCHOOL AUTHORITY(IES) for the purpose of this Manual includes **school jurisdictions**, **funded accredited private Schools**, and **private ECS operators**.

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

SCHOOL BUS means a motor vehicle that:

1. Is owned, leased or contracted by a **school authority**;
2. Is used for the transportation of **eligible passengers**;
3. Has a passenger **seating capacity** of 12 or more; and
4. Is without exemption a Type I, Type II, Type III or Type IV **school bus** as described in the CSA Standard D 250-M 2001 as amended or replaced from time to time as issued by the Canadian Standards Association.

SCHOOL JURISDICTION for funding purposes means an Alberta **school** district, **school** division, regional division, **francophone regional authority**, **charter school**, the Lloydminster Public School Division, or the Lloydminster Roman Catholic Separate School Division.

STUDENT WITH A DISABILITY means a **funded student** who has been assessed and coded as having a mild, moderate or severe disability.

STUDENT(S) WITH A SEVERE DISABILITY means **funded students** who have been identified as having a severe disability according to the following coding criteria:

Updated

CATEGORIES OF SEVERE DISABILITIES/DELAYS FOR ECS TO GRADE 12

SEVERE COGNITIVE DISABILITY (Code 41)

A **funded student/funded child** with a severe cognitive disability is one who:

- a) has severe delays in all or most areas of development;
- b) frequently has other disabilities including physical, sensory, medical and/or behavioural;
- c) requires constant assistance and/or supervision in all areas of functioning including daily living skills and may require assistive technology;
- d) should have a standardized assessment, which indicates functioning in the severe to profound range (standardized score of 30 ± 5 or less). Functional assessments by a qualified professional will also be considered in cases where the disabilities of the person preclude standard assessments; and
- e) has scores equivalent to the severe to profound levels on an adaptive behavioural scale (e.g., AAMR Adaptive Behaviour Scales-School: Second Edition (ABS-S:2); Vineland Adaptive Behaviour Scales; Scales of Independent Behaviour-Revised).

SEVERE EMOTIONAL/BEHAVIOURAL DISABILITY (Code 42)

A **funded student/funded child** with a severe emotional/behavioural disorder is one who:

- a) displays chronic, extreme and pervasive behaviours which require close and constant adult supervision, high levels of structure, and other intensive support services in order to function in an educational setting. The behaviours significantly interfere with both the learning and safety of the student/ECS child and other students/ECS children. For example, the student/child could be dangerously aggressive and destructive (to self and/or others), violent and/or extremely compulsive; and
- b) (for Grade 1-12 students) has a diagnosis including conduct disorder, schizophrenia or bi-polar disorder, obsessive/compulsive disorders, or severe chronic clinical depression; and may display self-stimulation or self-injurious behaviour. In the most extreme and pervasive instances, severe Oppositional Defiant Disorder may qualify; or
- c) (for ECS children) has either a diagnosis or a statement by a qualified professional indicating that the child experiences severe emotional/behavioural difficulties.

A clinical diagnosis within the last 2 years of a severe emotional/behavioural disorder by a psychiatrist, chartered psychologist or a developmental pediatrician is required, in addition to extensive documentation of the nature, frequency and severity of the disorder by **school authorities**. In the case of an ECS child who is not currently placed in a learning environment, extensive documentation of the nature, frequency, and severity of the disorder by the referring specialist may suffice. The effects of the disability on the student's/ECS child's functioning in an education setting must be described. An ongoing treatment plan/behaviour plan should be available and efforts should be made to ensure that the student/ECS child has access to appropriate mental health and therapeutic services.

A clinical diagnosis of a severe emotional/behavioural disorder is not necessarily sufficient to qualify under this category. Some diagnoses with behavioural components that are not sufficient to qualify are: Attention-Deficit/Hyperactivity Disorder (AD/HD), Attention Deficit Disorder (ADD).

SEVERE MULTIPLE DISABILITY (Code 43)

A **funded student/funded child** with multiple disabilities is one who:

- a) has two or more non-associated moderate to severe cognitive and/or physical disabilities which, in combination, result in the student functioning at a severe to profound level; and
- b) requires significant special programs, resources and/or therapeutic services.

Students/ECS children with a severe disability and another associated disability should be identified under the category of the primary severe disability. For example:

- A student/ECS child with a severe cognitive disability and another associated disability is not designated under this category, but is designated under severe cognitive disability.
- A student/ECS child with a severe emotional/behavioural disability and another associated disability is not designated under this category, but is designated under severe emotional/behavioural disability.

Revised The following mild or moderate disabilities cannot be used in combination with other disabilities to qualify under Code 43:

- a) Attention Deficit/Hyperactivity Disorder (AD/HD)
Attention Deficit Disorder (ADD) (ECS – Grade. 12)
- b) Emotional/Behavioural Disabilities (ECS – Grade. 12)
- c) Learning Disability (Grades 1 – 12 only)
- d) Speech and Language Related Delays (ECS – Grade 12)

NOTE: ECS children diagnosed with Down Syndrome in the most severe cases should be reported under Severe Multiple Disability (Code 43).

SEVERE PHYSICAL OR MEDICAL DISABILITY – including Autism (Code 44)

A funded **student/funded child** with a severe physical, medical or neurological disability is one who:

- a) has a medical diagnosis of a physical disability, specific neurological disorder or medical condition which creates a significant impact on the student's/ECS child's ability to function in the **school** environment (note: some physical or medical disabilities have little or no impact upon the student's/ECS child's ability to function in the **school** environment); and
- b) requires extensive adult assistance and modifications to the education environment in order to benefit from schooling.

A student/ECS child with severe autism or other severe Pervasive Developmental Disorder is included in this category. A clinical diagnosis by a psychiatrist, chartered psychologist, or medical professional specializing in the field of autism is required. A clinical diagnosis of autism is not necessarily sufficient to qualify under this category. Eligibility is determined by the functioning level of the student/ECS child with autism.

In order for a diagnosis of autism to be made, the student/ECS child needs to demonstrate impairment in the following areas:

- Social interaction; and
- Communication; and
- Stereotyped pattern of behaviour (i.e. hand flapping, body rocking, echolalia, instance on sameness and resistance to change).

A student/ECS child diagnosed with severe Fetal Alcohol Spectrum Disorder (FASD) may have Fetal Alcohol Syndrome (FAS) or Alcohol-Related Neurodevelopmental Disorder (ARND) and is included in this category (Code 44 – Severe Physical or Medical Disability – Including Autism). A clinical diagnosis by a psychiatrist, chartered psychologist with specialized training, or medical professional specializing in developmental disorder is required. A clinical diagnosis of FASD is not necessarily sufficient to qualify under this category. Eligibility is determined by the functioning level of the student with FASD. Students/ECS children with severe FASD who exhibit significant impairment in the areas of social functioning, life skills, behaviour, learning, attention and concentration, will need extensive intervention and support.

DEAFNESS (Code 45)

A **funded student/funded child** with a profound hearing loss is one who:

- a) has a hearing loss of 71 decibels (dB) or greater unaided in the better ear over the normal speech range (500 to 4000 hertz (Hz)) which interferes with the use of oral language as the primary form of communication, or has a cochlear implant; and
- b) requires extensive modification and specialized educational supports; and
- c) has a diagnosis by a clinical or educational audiologist. New approvals require an audiogram within the past 3 years.

If a student/ECS child has a severe to profound sensori-neural hearing loss that has not changed significantly since the initial approval by Alberta Education, documentation from a qualified specialist in the field of deafness outlining the severity of the hearing loss and modifications to the learning environment may be sufficient to support eligibility.

BLINDNESS (Code 46)

A **funded student/funded child** with severe vision impairment is one who:

- a) Has corrected vision so limited that it is inadequate for most or all instructional situations, and information must be presented through other means; and
- b) Has visual acuity ranging from 6/60 (20/200) in the better eye after correction, to having no usable vision or field of vision reduced to an angle of 20 degrees.

If a student/ECS child has a severe to profound visual impairment that has not changed significantly since the initial approval by Alberta Education, documentation from a qualified specialist in the field of vision outlining the severity of the disability and modifications to the learning environment may be sufficient to support eligibility.

For those students/ECS children who may be difficult to assess (e.g. cortical blindness – developmentally delayed), a functional visual assessment by a qualified specialist in the field of vision or a medical professional may be sufficient to support eligibility.

SEVERE DELAY INVOLVING LANGUAGE (Code 47) – For ECS children only.

A child with a severe delay involving language is one who has difficulty communicating with peers and/or adults because of a severe delay in expressive, receptive or overall language. The following criteria determine eligibility in this category:

- a) a child who has sufficient communicative ability to permit formal speech/language assessment should demonstrate results less than or equal to the first percentile in expressive, receptive or total language. If formal language assessment is not possible, a parental report and/or observational measure may be used; or
- b) a child who has severe phonological delay and at least a moderate delay in expressive, receptive or overall language (on a formal assessment of language); or
- c) a child who has at least a moderate to severe delay in expressive, receptive or overall language delay (on a formal assessment of language) and at least a moderate to severe delay in one or more of the following areas of development: fine motor, gross motor, vision, hearing.

Alberta Education criteria for a severe delay involving language are based on a child's developmental profile, not on individual subtest scores in any single area of development. Eligibility documentation must include an assessment completed by a Speech and Language Pathologist that includes the results of measures used and a description of the child's communicative ability. In order to qualify, the language delays must have a significant impact on areas such as: functional language, social use of language, vocabulary, language concepts, mean length of utterance, grammar and acquisition of early literacy. If the child qualifies on the basis of a language delay in combination with delays in other areas, those areas of delay must be assessed by an appropriate specialist and must result in a significant impact on the child's ability to function in an ECS environment.

Assessment reports that were completed within six months of the day the child begins his/her program must be submitted to the Special Programs Branch for pre-approval of the child's eligibility or with the PUF application.

Clustering must be the first option considered when planning programming for these children. In most cases a 475 - hour program is sufficient.

Children with moderate to severe delays in two or more non-associated areas (not including language) should be considered under Severe Multiple Disability (Code 43).

STUDENT WITH SPECIAL NEEDS means a **funded student** who is assessed and coded as having a mild, moderate or severe disability or who is gifted and talented. These students require an adapted or modified educational program to meet their special education needs. The **Individualized Program Plan (IPP)** provides documentation of the program and is a mandatory requirement for any student with special needs.

SUPERVISING BOARD means the **resident board** or the willing non-resident board providing supervision of the home education program.

Updated **TEMPORARY RESIDENT**, for purposes related to the interpretation of the *School Act*, is defined as a person who:

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

A **funded child** whose **parent(s)** fit the definition of a **temporary resident**, as it relates to the *School Act*, is eligible to access basic education at no cost. The **parent** shall not be required to pay foreign student tuition fees. In all other cases the **parent** may be required to pay foreign student fees at the discretion of the school **board**.

Temporary residents does not include:

Updated

- a) Visitors/tourists to Canada, with or without a valid visitor's visa; or
- b) Individuals in Canada with study permits who are not registered in either:
 - i. A full-time provincially recognized diploma program or full-time degree program of study that is a minimum of 2 years in duration; or
 - ii. A full-time graduate or post-doctoral program of study that is a minimum of 1 year in duration.
- c) Individuals who are registered in a preparatory program as a precondition to entering a full-time diploma or degree programs; or
- d) Individuals who register in a diploma or degree program offered as part of a continuing education program of study; or
- e) Individuals who are registered in an English as a Second Language (ESL) program; or
- f) Individuals in Canada for six months or less for the purpose of academic study or training.

Students of **school** age who are in Canada on a study permit are considered Foreign Students and do not qualify for Alberta Education funding.

See also definition of **Funded Student** (glossary) and Section 8 of the *School Act*.

TRANSPORTATION AGREEMENT means an agreement or a portion of an agreement entered into by a **school jurisdiction** under Section 62 of the *School Act* to transport students under its authority to a **school**.

UNORGANIZED TERRITORY means any area in Alberta that is not included within a district, a **division**, or a regional **division**.

URBAN DISTRICT means:

1. A city district which is not included in a school **division** or regional **division**; and
2. A district, **division** or regional **division**, or portion thereof, designated by the **Minister** as an **urban district**.

WEIGHTING FACTOR is a term used in conjunction with rural transportation and means, for the purposes of Block Funding, that:

1. Each **eligible passenger** in ECS and Grades 1 to 6 is multiplied by a factor of 1.0;
2. Each **eligible passenger** in Grades 7 to 12, is multiplied by a factor of 1.50;
3. Each **eligible passenger** in Grades 1 to 12 registered as Code 41, 42, 43, 44 or 46 student, is multiplied by a factor of 3.0;
4. An aide accompanying a **student/child with a severe disability** is multiplied by a factor of 1.50; and

Revised 5. Each **eligible passenger** who requires a wheelchair is multiplied by 8.0.

**RECESSING OR CEASING OF
OPERATIONS BY A PRIVATE ECS OPERATOR**

POLICY

Revised When funding has been provided by Alberta Education to a **private ECS operator**, and the **private ECS operator** decides to cease operations, than any surplus money shall be returned to the Provincial treasurer or provided to another operator of an approved **Early Childhood Services (ECS) program**.

CONDITIONS

- Revised**
1. An **ECS operator**, who chooses to go into recess, may not do so for more than one school year before making a final decision on ceasing or resuming operations.
 2. The final decision to cease operations must have been reached by the members of the society governing the ECS operations, at a general meeting called within the provision of the society's by-laws. This decision should be communicated to the respective Zone Services Branch as soon as possible.
 3. If an **ECS operator** decides not to continue providing a program, the operator may determine if another **ECS operator** is willing to take over the program.

If another **ECS operator** in the community agrees to take over the program and to accept the transfer of assets and liabilities, including operating and capital surpluses, that new operator must acknowledge receipt of this transfer and agree not to claim a capital grant. Written acknowledgement of an agreement to these terms must be sent to the School Finance Branch, Alberta Education, with a copy to the appropriate Zone Services Branch.
 4. If an **ECS operator** does not transfer its assets to another **ECS operator**, Alberta Education will determine the amount of surplus from operations to be returned to the Provincial Treasurer.

PROCEDURES

- New**
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**.

- Revised** 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 School Reporting Branch, Alberta Education by November 30 of the year in which the operator ceased operations.
- Revised** 3. Prepare an Audited Financial Statement (AFS) for the final year of operation or portion thereof and submit this statement to the School Reporting Branch, Alberta Education by the November 30 due date of the year operations ceased.
4. Prepare an inventory schedule of all assets/liabilities transferred on the date operations ceased and have it signed by officials of the **ECS operator** accepting the transfer.
5. Notify Alberta Government Services, Corporate Registry if the society will be dissolved on the specified date.
- Revised** 6. In the school year an operator decided to cease operations, fees paid by **parents** in that school year may be returned to the same **parents** from the operating surplus of that school year.
7. When the **ECS operator** ceases operation but does not transfer the assets and liabilities to another **ECS operator**, the final AFS will be reviewed and the accumulated surplus, if any, will be pro-rated by Alberta Education. The portion of the surplus to be returned to Alberta Education will be calculated on the ratio of Alberta Education's contribution to the total revenue of the **ECS program** over the final three years of operation.
8. The disposition of the operating surplus and capital assets not returned to Alberta Education should be approved at a meeting of the society members of the operator ceasing operations.

- 13 (1) A **Minister** may make grants if
- (a) the **Minister** is authorized to do so by regulations under this section, and
 - (b) there is authority available in a supply vote for the purpose for which the grant is to be made.
- (2) The Lieutenant Governor in Council may make regulations applicable to a **Minister**
- (a) authorizing the **Minister** to make grants;
 - (b) respecting the purposes for which grants may be made;
 - (c) governing applications for grants;
 - (d) respecting the persons or organizations or classes of persons or organizations eligible for grants;
 - (e) respecting the conditions required to be met by any applicant for a grant to render that person or organization eligible for the grant;
 - (f) empowering the **Minister** in particular circumstances to waive eligibility criteria prescribed under clause (d) or (e);
 - (g) respecting the conditions on which a grant is made and requiring the repayment of the grant to the Government if the conditions are not met;
 - (h) providing for the payment of a grant in a lump sum or by instalments and prescribing the time or times when the lump sum or the instalments may be paid.
 - (i) authorizing the **Minister** to make deductions from a grant and prescribing the circumstances under which the deductions may be made;
 - (j) limiting the amount of a grant or class of grant;
 - (k) authorizing the **Minister** to delegate in writing to any employee of the Government any power conferred or duty imposed on the **Minister** by this section or the regulations;

- (l) requiring a person or organization receiving a grant to account for the way in which the grant is spent in whole or in part;
 - (m) authorizing the **Minister** to enter into an agreement with respect to any matter relating to the payment of a grant.
- (3) A regulation made under subsection (2) may be specific or general in its application.
- (4) Despite subsection (2)(g), the **Minister** may impose further conditions not prescribed in the regulations on the making of a particular grant.

POLICY

Revised 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

- Revised** 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.
- Revised** 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.
- Revised** 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.
- New** 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.

- New**
8. A **board** may make an application to the Director of the School Finance Branch for additional expenses incurred as a result of the labour disruption, other than for distance education materials, which were required to ensure the instructional hours are not compromised.
 9. A **board** shall notify Alberta Education, immediately following the end of a strike or lockout, of the period and number of days of the cessation of services.
 10. In the event that a strike by teachers or a lockout by a **board** occurs on the **count date**, an alternate **count date** will be determined by the Director of School Finance.
 11. Alberta Education will provide the **board** with a detailed calculation of the funding reduction.
 12. After the strike or lockout, the funding reduction amount will be recovered from the next applicable payment(s) to the **board**.
 13. In the event of a dispute over the amount of funding reduction and/or the amount claimed in additional expenses or make up days, a **board** may submit its concern(s) in writing to the **Minister**.
- Revised**