

Funding Manual for School Authorities 2004-2005 School Year

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

Message from the Minister

I am pleased to provide you with Alberta Learning's Funding Manual for School Authorities – School Jurisdictions, Charter Schools, Private Schools and Private ECS Operators - for the 2004-2005 school year. This manual reflects the implementation of all three pillars of the renewed Funding Framework for school jurisdictions.

I have authorized this funding manual for use by school jurisdictions, charter schools, private schools, and private ECS operators, to access Alberta Learning funding. This funding is for the provision of approved education programs for students in grades 1 to 12 and ECS children.

The manual provides details on the funding available for 2004-2005 including applicable funding rates, criteria, application procedures, and reporting that is required. Part 1 for school jurisdictions has been re-organized and reformatted with significant changes to the content. The Summary of Significant Changes outlines some of these changes for 2004-2005. I 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 on pages 3 and 4 of the Introduction section.

Best wishes for a successful school year in 2004-2005.

Sincerely,

Dr. Lyle Oberg Minister of Learning

FUNDING MANUAL FOR SCHOOL AUTHORITIES 2004/2005 SCHOOL YEAR

- 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	Date
Minister of Learning	

SUMMARY OF SIGNIFICANT CHANGES FOR 2004-2005 FUNDING MANUAL FOR SCHOOL AUTHORITIES FOR THE 2004-2005 SCHOOL YEAR

The following outlines the significant changes to the manual, including those relating to the renewed Funding Framework and the implementation of the Funding Pillar effective September 1, 2004.

- 1. Funding allocations that have been deleted and rolled into the renewed Funding Framework for school jurisdictions:
 - ECS Program Enhancement Projects
 - Teacher Assistant Program
 - Early Literacy (ECS Gr. 2)
 - Technology Integration
 - Teacher Salary Enhancement (ECS Gr. 12)
 - Sparsity and Distance
 - Growth and Density
 - System Administration (ECS Gr. 12)
 - Enhanced Opportunity Projects
 - First Nations, Métis and Inuit Education Projects
- 2. Funding allocations that are added or restructured under the renewed Funding Framework for school jurisdictions, effective September 1, 2004:
 - Socio-Economic Status
 - Small Schools by Necessity
 - Intra-Jurisdiction Distance
 - Enrolment Growth
 - Enrolment Decline
 - Small Board Administration
 - Northern Allowance
 - Relative Cost of Purchasing Goods and Services Adjustment
 - First Nations. Métis and Inuit Education (ECS to Grade 12)
 - Severe Disabilities Grades 1 12
 - ECS Mild or Moderate Disabilities and Gifted and Talented
 - English as a Second Language/Francisation
 - Stabilization
 - Enhanced ESL and Support Services for Immigrant Students
- 3. Resources for the Classroom Funding ended March 31, 2004.
- Sections 1.1, 1.2 and 2.1 of the 2004-2005 manual include a sub-section entitled FEES AND DEDUCTIONS. This sub-section includes fee deductions for Edulink, Cancopy, Alberta School Boards Association and rental for ECS portable

- classrooms, as applicable. The sections for ECS Portable Classroom Rental (previously sections 1.8 and 2.2) have been eliminated.
- 5. Part 1, the section titled Renewed Framework for Funding School Jurisdictions, now includes an explanation of the Funding Pillar.
- 6. Part 1, sections 1.8, 1.23 and 1.25, English as a Second Language, Francisation and Enhanced ESL and Support Services for Immigrant Students funding, respectively, involves the use of two student enrolment counts in a school year to provide funding for in-year enrolment growth in these programs.
- 7. Parts 1 and 3, sections 1.2 and 3.1 respectively, have been revised to include grade 10 funding provided on a CEU basis rather than on a per student basis.
- 8. The requirement for providing access to a minimum number of hours of instruction has been reinstated into sections 1.1 and 1.2, at the request of school jurisdictions.
- 9. Basic Instruction funding in sections 1.1, 1.2, 2.1 and 3.1 has been renamed Base Instruction in these sections.
- 10. Part 3, section 3.2, Designated Special Education Private Schools (DSEPS): The requirement that a school jurisdiction transfer funding on a pro-rated basis to a DSEPS, for a student with a mild or moderate disability that transfers from the school jurisdiction to the DSEPS after September 30, has been removed. Also, this same transfer of funds requirement has been removed for a student with a mild or moderate disability that transfers from a DSEPS to a school jurisdiction.
- 11. The Private School Base Instruction funding rate has increased for 2004 2005 as a result of a shift from 60% of the old Basic Instruction funding rate for school jurisdictions and charter schools, to 60% of the new Base Instruction funding rate for school jurisdictions and charter schools. Before the grant rate increase for 2004 2005, the increase resulting from the shift in funding is \$253 per student.
- 12. Learning Resources Credit has been moved from sections 1.14 and 3.6 to section 6.3. The new section consolidates the Learning Resource Credit for school jurisdictions and accredited private schools into one section.
- 13. Resident Students of Government has been moved from section 3.4 and incorporated into section 6.1, which becomes Institutional Programs and Resident Students of Government.
- 14. Francisation funding has been moved from section 4.3 to Part 1 as section 1.23. This area is now funded by Alberta Learning as funding from the Federal government has ended.
- 15. Debt Retirement has been moved from section 5.2 to section 6.5.
- 16. Regional Consortium has been moved from section 5.5 to section 6.4.

- 17. Part 5 has been renamed PROVINCIAL PRIORITY TARGETED FUNDING. Included are specifically funded programs. The funds are to be used for the program for which they were provided, namely, the Student Health Initiative, Alberta Initiative for School Improvement and High Speed Networking.
- 18. Part 6 has been renamed OTHER PROVINCIAL SUPPORT and includes those programs for which designated or contracted school jurisdictions or private schools receive specific funding. The Learning Resources Credit and Debt Retirement are included because they are programs for which funds are not paid directly to a school jurisdiction or private school.
- 19. Part 6, section 6.2, Regional Educational Consulting Services (RECS). The mandate has been expanded for this funding category to provide services to funded students/children with severe disabilities (except code 42) and funded students with a mild/moderate disability coded as 55 and 56. Alberta Learning will determine the funding allocation for each program based on provincial and regional needs.
- 20. ECS funding categories in Part 2 for private ECS operators, including private schools with ECS programs, will remain the same for 2004 2005 as they were in 2003 2004. These funding categories will all receive a grant rate increase. The ECS Base Instruction rate for private ECS operators is different from the ECS Base Instruction rate for school jurisdictions because private ECS operators will continue to receive separate Mild or Moderate funding, ECS Plant Operation and Maintenance funding, Teacher Salary Enhancement funding, ECS Program Enhancement Project funding, ECS Early Literacy funding, and ECS Administration funding. School jurisdictions had these funding categories rolled into their renewed Funding Framework which resulted in a higher Base Instruction rate.
- 21. Throughout the Manual, the term "funded child" replaces "child" and the definition of child in the Glossary of Terms becomes "funded child". The term "funded child" for ECS is more in line with the term "funded student" for grades 1 to 12.
- 22. In the Glossary of Terms under "Students with Severe Disabilities", the name of the definition for Severe Communication Disorder (code 47) has been changed to Severe Delay Involving Language (code 47). Some revisions were also made to this definition.
- 23. Transportation funding for school jurisdictions has been increased to:
 - a) Assist school jurisdictions in sparsely populated areas that are experiencing declining enrollments.
 - b) Provide incentives to school jurisdictions to consider cooperative transportation services to transport students of other school jurisdictions.
 - c) Better accommodate small urban communities with populations of 10,000 to 30,000 people

2004 – 2005 FUNDING MANUAL FOR SCHOOL AUTHORITIES

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For School Boards, Francophone Regional Authorities, and Charter Schools

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The public education system faces many challenges and opportunities. To assist **school jurisdictions** to meet these challenges and opportunities, a funding allocation model has been developed that provides greater flexibility to achieve the desired outcomes. The renewed Funding Framework provides a means to allocate funds to **school jurisdictions** to provide a quality education reflecting the needs of students and society. It is an allocation system that distributes funds equitably, provides maximum flexibility to accommodate local decision-making and requires public accountability for the use of resources and the results achieved.

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, or regulations or for specific instructions, or explanatory material issued by various branches of Alberta Learning.

The Funding Manual for School Authorities is released by Alberta Learning 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 private schools in accessing funding from Alberta Learning.

Section Format

The formats for each section of the manual describing the funding that is available to **school authorities** are as follows:

PART 1: School Jurisdictions

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

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

PROCEDURES, DOCUMENTATION AND REPORTING: what procedures/documents/ reporting that **school jurisdictions** must follow/maintain/provide in order 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 2004-2005*.

Updated CONTACT ALBERTA LEARNING FOR ASSISTANCE

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

	BRANCH	CONTACT	PHONE #
	School Finance	Wayne Braun Kenneth Poon Mark Lalumiere Jeff Willan Dick Meanwell	780-422-0312 780-422-1098 780-422-6550 780-427-2055 780-422-0311
	School Reporting	Dale Fulford	780-427-2055
	Budget and Fiscal Analysis	Gene Williams	780-427-2055
Updated	Special Programs	Valerie Keates Lorraine Stewart Ron Taylor (Calgary)	780-422-6326 780-427-5419 403-297-5021
	Information Services (IS)	Help Desk	780-427-1111
Update Update		Terry Wendel Michael Walter Loraine Steele David Woloshyn Doug McDavid Dianna Millard Morris Manyfingers	780-427-5394 780-427-9296 780-427-5381 780-415-9312 780-427-5377 780-427-7882 780-415-9300
	French Language Services	Debby Johnston	780-427-2940
Updated	Governance and Program Delivery	Rick Hayes	780-427-7235
	Alberta Children and Youth Initiative	Sandi Roberts Pat Cox	780-422-9423 780-427-1199
Updated	¹ Curriculum	Merla Bolender Jennifer Bushrod (ESL)	780-427-2984 780-422-0624

BRANCH	CONTACT	PHONE #
Alberta Infrastructure - Learning Facilities Branch		
NÖRTH –	Guy Smith	780-422-7459
CENTRAL –	Doug Ramsey	780-422-0623
SOUTH -	Mike Irving	403-297-4563
Updated 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., Wayne.Braun@gov.ab.ca).

The 2004-2005 Funding Manual for School Authorities is available for viewing and printing on Alberta Learning's website at http://www.learning.gov.ab.ca/funding/FundingManual/

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

Alberta Learning School Finance Branch 8th Floor, Commerce Place 10155 - 102 Street Edmonton, Alberta T5J 4L5

FAX# 780-427-2147

INTRODUCTON REFERENCES AND WHERE TO OBTAIN THEM

Updated DOCUMENTS:

Funding Manual for School
Authorities 2004 – 2005

available from the Alberta Learning website –
 http://www.learning.gov.ab.ca/funding/FundingManual/

Guide to Education ECS to Grade 12 (2004)

 available from the Alberta Learning website – www.learning.gov.ab.ca
 Click on Kindergarten to Grade 12, then under Legislation, Regulations and Policies.

Guide to School Authority (School Board, Charter School, Private School) Planning and Results Reporting available from the Alberta Learning website – www.learning.gov.ab.ca
 Click on Kindergarten to Grade 12, then on, Information for Administrators select Planning Resources for School Jurisdictions.

Advisory Manual on Early Childhood Service for Incorporated Non-Profit Societies and Private Schools available from the Alberta Learning website –
 www.learning.gov.ab.ca
 Contact: Zone Branches – see Contacts for Assistance section of the Introduction.

Policy, Regulations and Forms Manual

available from Alberta Learning website –
 www.learning.gov.ab.ca
 To access the Manual,
 click on Kindergarten to Grade 12 Education then
 click on Legislation, Regulation and Policies.

Private Schools Reference Manual (2003) Charter School Handbook

available from the Alberta Learning website – www.learning.gov.ab.ca

...

- contact: Special Programs Branch (780) 422-6326

Kindergarten Program Statement - contact: Curriculum Branch (780) 427-2984

(780) 422-0624 Jenny Bushrod

ECS Program Unit Funding. A Handbook for ECS Operators - contact: Special Programs Branch (780) 422-6326

Student Health Partnership Service Plan Guidelines for 2004/2005 contact: Alberta Children and Youth Initiative (780) 422-9423 School Capital Funding Manual

 available on the Alberta Infrastructure website – http://www.infras.gov.ab.ca/content/doctype383 /production/school capital manual 2002-03.pdf

 contact: Alberta Infrastructure Learning Facilities Branch

(780) 427-7924

Standards for Special Education,

Amended 2004

contact: Special Programs Branch

(780) 422-6326

First Nations. Métis. and Inuit Education Program Guide

contact: Aboriginal Services Branch

(780) 415-9300

Handbook for the Identification and Review of Students with Severe

Disabilities

 available on the Alberta Learning website http://www/learning.gov.ab.ca/k 12/specialneeds

/identificationhandbook.pdf

Special Education Definitions 2002/2003

 available on the Alberta Learning website http://www.learning.gov.ab.ca/k 12/ specialneeds/specialed def.pdf

For copies of "Alberta Statutes" referenced in this manual, contact:

Queen's Printer Bookstore Main Floor, Park Plaza 10611 - 98 Avenue Edmonton, Alberta T5K 2P7

(780) 427-4952

OR

Queen's Printer Bookstore John J. Bowlen Building 602 - 6207 7th Avenue S.W. Calgary, Alberta 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.

INTRODUCTION GENERAL CONDITIONS THAT APPLY TO FUNDING

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 that the funding is provided for. 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 learning needs of all their students, for the results achieved and for the use of resources.
 - 4. **School authorities** are expected to:
- **Updated** a) meet the conditions and requirements outlined in this manual. Failure to do so may result in a reduction or denial of funding.
 - 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 educational 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.

- 6. **School authorities** applying for funding shall keep on file the documents and invoices required to support their claim for each type of program funding described in this Manual, and the following information:
- Revised a) an eligible enrolment count as of 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;
 - c) a record of the daily attendance of each enrolled student and also for high school students, a copy of the timetable for each student; and
 - d) a list of **schools**, teachers and administrators involved in each program.
 - 7. Alberta Learning 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 Learning indicates that:
 - a) a **school authority** has received funding to which it was not entitled;
 - b) a **school authority** has not received funding to which it is entitled.
- 9. Payments in January, and subsequent payments shall be withheld from **private ECS operators** and **funded private schools** if the Audited Financial Statements or the
 Budget Report have not been completed in accordance with the respective Guidelines
 and submitted to the School Reporting Branch by the due date. When both forms
 have been submitted and determined to be acceptable, payments will be released.
 - 10. Payments may be withheld from **school jurisdictions** and **funded private schools** that are late in submitting: the Audited Financial Statements, Budget Report, School Board Three-Year Education Plan, Annual Education Results Report (AERR), or any other information requested or required by the **Minister** by the dates specified in the *School Act* and by Alberta Learning. Payments will be re-instated after Alberta Learning receives the required information.
 - 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 Learning 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. All borrowings for capital expenditures by a **school jurisdiction**, and all borrowings for operating expenses by a **school jurisdiction** to the extent they exceed the account receivable balance as shown in the most recent audited financial statements, require the prior approval of the **Minister**. Section 183(1) & 183(2), *School Act*

A budgeted annual deficit for an upcoming school year is acceptable if, and only if, sufficient accumulated operating surplus is 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 Learning 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 is expected to work with Alberta Learning 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**.

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 system's 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:

Revised

- ACCOUNTABILITY: The renewed Funding Framework has an increased emphasis on assessing and reporting outcomes achieved with the resources provided and focuses on continuous improvement.
- 2. CONSISTENCY: The renewed Funding Framework provides a means to apply the rules and conditions for base funding consistently across the province.
- EQUITY: The renewed Funding Framework provides a means to distribute 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 provides a means for planning that is consistent with the provincial goals for the basic learning 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 provides a means to minimize 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 provides a means for the provincial government to set goals and priorities for the basic education system and provides the government with the ability to pilot and monitor initiatives.

FLEXIBILITY, ACCOUNTABILITY AND FUNDING PILLARS

The 2003-2004 school year was the transition year in which the renewed Funding Framework was partially implemented with, the Flexibility and Accountability Pillars.

Revised Beginning with the 2004-2005 school year, the third pillar, called the Funding Pillar will be fully implemented. The Funding Pillar will change and reallocate funding among school jurisdictions through the profile mechanism as outlined in the Funding Manual. Additionally, for the 2004-2005 school year and future years no school jurisdiction will receive less funding from Alberta Learning under the renewed Funding Framework than it would have received under the previous funding formulas, subject to adjustments for enrolment decline from the previous year. The stabilization amount will be determined and paid by School Finance to eligible school jurisdictions in the form of Stabilization funding. Funding that is one-time in nature will not be included in the calculation of this funding.

FLEXIBILITY PILLAR

The renewed Funding Framework provides **school jurisdictions** with flexibility to allocate funds to programs that meet the educational needs of their students and address local needs. While every effort has been made to provide maximum flexibility to **school jurisdictions**, a minimal number of restrictions 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 jurisdictions total expenditures as outlined in the Guidelines published by the School Reporting Branch.
- Updated2) Transfers of Alberta learning revenues into or out of Operations and Maintenance and/or School Capital is not permitted as these funding areas are the responsibility of Alberta Infrastructure.
- Updated3) 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 Learning System Policy, Regulations and Forms Manual for more details.

- 4) Funding for the provincial initiatives, the Alberta Initiative for School Improvement, the Student Health Initiative and High Speed Networking, must be spent on the program for which it was provided.
- Revised 5) Given the nature of the following funding areas, it is not possible to utilize the funding for purposes other than for which it was provided: Program Unit Funding, Francophone Education Funding, French Language Funding, Institutional Programs Funding, Regional Educational Consulting Services Funding, Learning Resources Credit, Regional Consortium Funding, and Debt Retirement.

ACCOUNTABILITY PILLAR

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 and specific, well-defined targets set by jurisdictions on a common set of measures. There are seven categories of measures:

- student achievement;
- high school completion rates;
- satisfaction rates:
- children at risk (academically);
- safe and caring school environment;
- parent involvement; and
- a board selected indicator chosen from Review Committee on Outcomes (RCO) set of indicators.

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 learning needs of all students, for ensuring provincial policy, legislation, regulations and standards are met, and for reporting on allocation and use of funds.

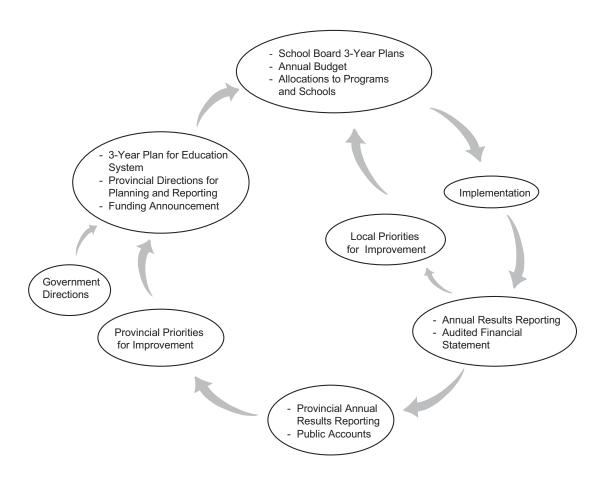
School jurisdictions continue to prepare Three-year Education Plans and assess and report on the results annually in Annual Education Results Reports (AERRs), as required by the *Government Accountability Act*. Jurisdiction plans and reports will contain the enhanced accountability requirements.

Accountability Framework for ECS – 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 Learning) about school jurisdiction and school directions and results.

Accountability Cycle for Continuous Improvement in ECS – 12 Education in Alberta



Each level in the Accountability Framework plays a key role.

GOVERNMENT OF ALBERTA – sets provincial direction and allocates funds to ministries; monitors and reports on progress; and uses results to plan improvements.

ALBERTA LEARNING – prepares three-year learning system business plan and guidelines for school authority and post-secondary institution planning and reporting based on provincial direction; assesses and reports annually on results and uses results to set targets and plan improvements; identifies provincial priorities for improvement; allocates funds to school boards and post-secondary institutions; and defines basic education, establishes outcomes for the K-12 system, reviews school board and post-secondary plans and results for compliance with provincial requirements and for evidence of improvement, and to identify implications for provincial level planning.

SCHOOL JURISDICTIONS – plans and implements three-year education plans aligned with Ministry direction; allocates resources to schools and programs; monitors progress; assesses and reports results annually to stakeholders and uses results to set targets and plan improvements.

SCHOOLS – plans and implements three-year education plans aligned with school board direction; monitors progress; assesses and reports results annually to stakeholders and uses results to set targets and plan improvements.

The performance of **school jurisdictions** will be assessed on the accountability measures, and results will be evaluated against specific and well-defined targets. If a target level is not achieved or results do not show improvement, the **school jurisdiction** and Alberta Learning will work collaboratively to develop strategies to improve results.

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 2004 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 and assessment of results reporting and action planning to address areas requiring improvement. The Guide also includes updated information on target setting and surveys.

New FUNDING PILLAR

The renewed Funding Framework is based on a jurisdiction profile concept in which factors contributing to significant cost variances between **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 Learning. 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.

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: Students with Severe Disabilities, English as a Second Language students, Aboriginal students, Early Childhood Services children with mild or moderate disabilities and 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.

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 and the cost differences among local **school jurisdictions** for purchasing goods and services.

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)

Revised 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.

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 Learning 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.

SECTION 1.1 ECS BASE INSTRUCTION FUNDING

ALLOCATION FORMULA

ALLOCATION CRITERIA

Revised 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 cannot be accommodated by a 475-hour program (ie. they may require more or fewer hours). Also some **special needs children**, either because of their disability or young age, may benefit from an in-home program or from a combined program involving school hours and **home visits**. A combined program must have a minimum of four **home visits** to gualify for funding. See definition of

home visit in the Glossary of Terms for more details.

2. 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 another ECS operator in the current school year did not claim the funded child.

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 Learning 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.

3. 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 Learning will not provide more than one year of funding for a regular ECS funded child.

- 4. ECS **children with disabilities** may qualify for more than one year of funding. See definition of **funded child** in the Glossary of Terms.
- 5. 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 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.
- 6. All individuals who are age 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 and b) are counted as **funded children**.

- 7. 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**.
- 8. 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**.
- 9. Under no circumstances can an individual be counted as both a **funded student** and as a **funded child** in the same school year.

PROCEDURES, DOCUMENTATION AND REPORTING

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.

Revised b) After receiving your first RACERS data, any modification required can be submitted using the Funding Events Systems (FES) before the April 29 deadline.

ADDITIONAL INFORMATION

- 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.
- 2. A child referred to in Section 30(1)(a) of the *School Act* is not a resident or non-resident student of a **board**, therefore, **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 as to the fees charged for the program.
- New 3. 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.
 - 4. Alberta Learning 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.
 - 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.
 - 6. **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.

7. **School jurisdictions** may use funds provided by Alberta Learning for ECS to Grade 12 programs to meet the learning needs of all their **funded children** and **funded students**.

New 8. Refer to Part 7, section 7.7, Enrolment Counts and Conflicts, for additional information.

FEES AND DEDUCTIONS

Portable Classroom Rental Fee:

Revised

Alberta Learning 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

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

Kindergarten Program Statement

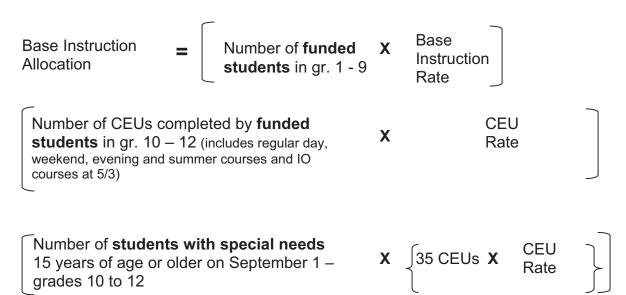
Early Childhood Services Policy 1.1.3

Early Childhood Services Regulation AR 31/2002

School Capital Manual, Alberta Infrastructure, April 2002

ALLOCATION FORMULA

- Revised 1. Up to 60 CEUs, including CEUs completed in Integrated Occupational (IO) courses and regular programs, will be funded for each grade 10 to 12 **funded student** for a school year.
 - a) Base Instruction Grades 1 12:



ALLOCATION CRITERIA

- New 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 timetabled for both the student and teacher per high school credit.
- Updated 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 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 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. Course Completions for Students in Grades 10 to 12

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

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

Revised

"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 the *Funding Manual for School Authorities* provided by Alberta Learning. As the political, educational and financial leaders, 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."

Updated 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 04AL1.2d. The declaration will be considered part of the accountability of **school boards** in reporting CEUs for funding purposes.

Revised

Courses delivered to students and claimed for funding must meet the conditions in this Funding Manual and must also comply with all other Alberta Learning 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:

Revised

- 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.

For diploma examination courses condition 7(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:

Revised

- 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.

Revised

- 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:

- 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.

8. 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, evenings (after 6:00 p.m.), and the summer months, 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.
- d) Funding is provided for RAP, Work Experience, Special Projects 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);
- g) Funding is provided for credits earned through locally developed senior high school credit courses, where instruction is provided;
- h) Funding is provided for credit-bearing religious education courses, where instruction is provided;
- i) Funding is provided for credits in Special Projects 10 20 30 courses;
- j) Funding is provided for students in senior high school who take full year junior high courses; the equivalent of 5 CEUs will be funded for each course completed (form 04AL1.2a);

Revised k) For students with special needs who are 15 years of age or older on September 1 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;

- Revised I) Integrated Occupational (IO) course 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, 1122, 1123 or 1125, will be funded at the rate of 17.5 CEUs per student per semester of ESL courses taken. No additional funding is provided for other courses completed during these semesters. Students taking ESL courses or non-ESL courses during the summer term will be funded on a CEU basis;
 - n) Funding is provided for credits granted through **challenge assessments** at 20 percent of the CEU value for the course(s) challenged;
 - o) When a student takes two French as a Second Language courses 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;

- 2004-2005
 - g) 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 Learning.
 - 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 Learning; and

Updated

s) Funding is provided for Alberta funded students enrolled with a Lloydminster school division high school on Sept. 30.

9. 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 or co-curricular activities, such as competing on an athletic team.
- Revised 10. 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.

PROCEDURES, DOCUMENTATION AND REPORTING

Base Instruction funding is based on: 1.

Revised

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 04AL1.2b for students attending First Nations schools.
- d) Student information on Form 04AL1.2a for senior high students taking junior high courses.
- e) Refer to Part 7, section 7.7 for additional 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.
- Revised b) After receiving your first RACERS data, any modification required can be submitted using the Funding Events System (FES) before the April 29 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)(a)(iii) of the School Act; and
- **Revised** b) a letter indicating the student's name, birthdate 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 04AL1.2b.
 - 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) The 140 code results in the student being included in the resident **school jurisdiction's** September 30 headcount and all related funding is provided by Alberta Learning to the resident **school jurisdiction**. This ensures that the **resident board** maintains responsibility for the student. No funding is provided by Alberta Learning 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** 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

- 1. The following conditions apply 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) A **school jurisdiction** that directs a student to a **DSEPS** will pay all program costs that are not covered by funding provided by Alberta Learning to the **DSEPS**.
 - b) The **DSEPS** must advise parents of the need to discuss their child's mild or moderate disability, or gifted and talented special education eligibility and programming options with their **resident board** prior to enrolment in the **DSEPS**. The **resident board** should retain a record of the discussion.
 - **Revised** Parents are required to consult with a school official of their resident board regarding their child's special education programming options. The following three requirements constitute a parent consultation:
 - 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 or gifted and talented special need;

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

When the child with a mild or moderate disability or who is gifted and talented is enrolled in a **DSEPS**, funding of \$9,125 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 \$5,683 (rather than the funding of \$9,125) for these students. These students must be coded by the **DSEPS** using the funding code 500 with the applicable special needs 50's code (mild/moderate), or 80 code (gifted and talented). The 110 code cannot be used for these students.

Updated

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 Learning, confirming which students' parents discussed placement options with their resident **school jurisdiction** and which did not. This confirmation will determine the **DSEPS** instruction funding rate paid by Alberta Learning.

- c) 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), <u>funding will no longer be required to be transferred</u> by the school jurisdiction or by the DSEPS on a pro-rated basis.
- d) No pro-rated instruction funding will be provided by Alberta Learning to the **DSEPS** for students enrolled after September 30.

FEES AND DEDUCTIONS

1. Cancopy:

Alberta Learning has an agreement with the Canadian Copyright Licensing Agency (Cancopy). Most **schools** in the province are covered in the license. Alberta

Learning makes the payment for the license on behalf of all participating **school jurisdictions** and **charter schools**. The cost 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 Council 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 Learning 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 October 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 Learning 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 Learning 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 for **funded students** in grades 6 to 9 and CEU funding for **funded students** in grades 10 to 12 as described in section 1.2 of this manual.
- 2. A **school jurisdiction** will receive outreach base funding for each Alberta Learning approved **outreach program** to offset some of the higher costs associated with running an **outreach program**.

ALLOCATION CRITERIA

1. The Allocation Criteria and Procedures, Documentation and Reporting requirements outlined in section 1.2 also apply for this section.

PROCEDURES, DOCUMENTATION AND REPORTING

- Updated/1. Applications for approval to begin new **outreach programs** should be submitted by Revised March 31 to your Zone Services Branch Director using form 04AL1.3.
 - 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 Schools Regulation AR 238/97, as amended.

ADDITIONAL INFORMATION

1. Students in an **outreach program** may also complete courses in other programs or **schools**.

Updated/2. The *Outreach Programs Handbook* provides assistance in developing an outreach application.

REFERENCES

Outreach Program Policy 1.1.4

Standards for Special Education

Guide to Education: ECS to Grade 12, 2004

Alberta Learning Programs of Study

Updated/ New

Outreach Programs Handbook

ALLOCATION FORMULA

1. Home Education:

PLUS,

- a) 50 percent of the compulsory 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 04AL1.4b)

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

PLUS.

The lesser of:

a) 50% of the compulsory ADL course costs, and

b) the result of
$$\left\{ \begin{array}{ll} \text{Percentage of the} & \text{Home Ed.} \\ \text{Home Education} & \textbf{X} & \text{Rate} \\ \text{Program} \end{array} \right\}$$

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

- Revised 1. Funding may be provided to the **supervising board** for **home education students** the **board** 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 the supervising board for home education students in grades 7 to 12 enrolled in the Alberta Learning Program of Studies through the Alberta Distance Learning Centre (ADLC) or through Distance Education Consortia operated by supervising boards in courses to a 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 Learning for a home education student in a school year will not exceed the home education funding rate. This funding may be claimed on form 04AL1.4a.
 - 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 04AL1.4b.
 - 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 Learning 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 Learning 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**.
- Revised 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 Learning 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, 04AL1.4a, for grades 7 to 12 and 04AL1.4b, for grades 1 to 6.

- 8. **Home education students** and their **parents** must live in Alberta on September 30 of the current school year.
- 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.

PROCEDURES, DOCUMENTATION AND REPORTING

- 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 ADLC courses for **home education students** on form 04AL1.4a.
 - c) Report of additional ADL course costs for grades 1 to 6 on form 04AL1.4b
- 2. **School jurisdictions** 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**.

New 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%	Χ	\$1241	= \$496.40
Plus ADL course costs to a maximum of 40 percent of home education rate	40%	X	\$1241	= \$496.40
Plus the Regular school rate	60%	X	\$4963	= <u>\$2977.80</u>
(for the applicable grade) Total				<u>\$3970.60</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:

Total				=	\$2357.60
Regular School Rate (for the applicable grade)	30%	X	\$4963	=	<u>\$1488.90</u>
Home education rate	70%	X	\$1241	=	\$868.70

REFERENCES

Home Education Policy 1.1.2

Home Education Regulation AR 126/99

2004-2005 FUNDING MANUAL FOR SCHOOL AUTHORITIES SCHOOL JURISDICTIONS
SECTION 1.5
ECS MILD OR MODERATE DISABILITIES
AND GIFTED AND TALENTED FUNDING

ALLOCATION FORMULA

Revised ECS Mild/Moderate and Gifted and Talented Allocation Number of children with mild or moderate disabilities and gifted and talented funded children

X Mild or Moderate and Gifted and Talented Rate

ALLOCATION CRITERIA

- The relative weighting factor (see Funding Rates) applied to the Learning Grant Rate
 to determine the rate per eligible child with mild or moderate disabilities or 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** 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 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 one (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.

PROCEDURES, DOCUMENTATION AND REPORTING

- 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 exceptional student Code 30 for children with mild or moderate disabilities 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 Learning Student Registration Form to receive this funding.
- Revised 2. For **funded children** who were enrolled in the program on September 30 but were assessed as mildly or moderately disabled or identified as gifted and talented after September 30, an "Add, Modify, Delete" form (form 04AL1.2c) 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 29 to receive this funding.

- New 3. Recent assessment documentation to support each **funded child's** designation and identification as a **child with a mild or moderate disability** or a **funded child** who is gifted and talented must be kept on file by the **ECS operator**.
- New 4. An Individualized Program Plan (IPP) for each child with a mild or moderate disability or a funded child who is gifted or talented is to be developed and kept on file by the ECS operator.

REFERENCES

<u>Advisory Manual on Early Childhood Service for Incorporated Non-Profit Societies or</u>
Private Schools

Early Childhood Services Policy 1.1.3

Guide to Education: ECS - Grade 12

ALLOCATION FORMULA

UNDER REVIEW

- 1. The allocation amount for each unit will be the lesser of:
 - a) the approved budget amount,
 - b) the program unit ceiling amount, and
 - c) the actual cost.
- 2. a) Calculation of the ceiling amount for a program unit with <u>one</u> Program Unit **funded child:**
 - i) Centre-based program

ii) In-home based program

iii) Combined program : centre-based and in-home based program

Ceiling Amount
$$= \underbrace{ \begin{cases} \text{Number of Centre} \\ \text{Hours (max 800)} \end{cases}}_{800 \text{ hrs}} + \underbrace{ \begin{cases} \text{Number of Visits} \\ \text{(max 36)} \end{cases}}_{36 \text{ visits}}$$
 X Ceiling Rate for one 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):

Choose the Program Unit **funded child** with the highest combination of hours and/or **home visits** and calculate the ceiling for this Program Unit **funded child** as follows:

PLUS,

for each additional Program Unit **funded child** in the unit, the following:

- c) Maximum funding for a program unit is based on an 800-hour program or 36 inhome visits or a 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** 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. **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/codes and related definitions outlined in **students/ECS children with severe disabilities** in the Glossary of Terms to determine a **funded child's** disabling condition for PUF eligibility purposes.
- 5. A **funded child** receiving PUF is not eligible for ECS mild/moderate funding.
- 6. A **funded child** may be claimed by only one **ECS operator** at a time. The **school jurisdiction** claiming the **funded child** is responsible for ensuring the **funded child** is not claimed by another **ECS operator**.
- Revised 7. Eligibility for PUF will be based on all of the following:
 - a) a diagnosis of a disability/condition at the severe/profound level by qualified personnel (note: a diagnosis alone is not sufficient to qualify for funding);
 - b) documentation/assessments of the **funded child's** current level of functioning in the learning 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**.

Updated

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 **funded child**. This information could include actual reports, summary information, or a format agreed upon with Alberta Learning. When a **school jurisdiction** is uncertain of a **funded child's** eligibility, the operator is encouraged to discuss the issues of the **funded child's** eligibility with the Special Programs Branch of Alberta Learning prior to making an application.

PROCEDURES, DOCUMENTATION AND REPORTING

Revised 1.

1. A PUF application must be submitted (Form 04AL2.3a) to the School Finance Branch by January 1. Payment is based on approval of this application. Applications must 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. The assessment information must be sent to the Special Programs Branch for pre-approval.

NOTE: All school jurisdictions and designated special education ECS programs and other school authority types 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. 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 each **funded child** receiving PUF must be kept on file by **school jurisdictions**:
 - a) an **individualized program plan (IPP)** must be developed, implemented and regularly revised for each **funded child**; and
 - b) formal assessment documentation to support the severity of each 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 **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 1 will be accepted until May 1, using the process described in #1.

Updated

4.

- When a **funded child** leaves a program before the end date specified on a PUF application, please notify Alberta Learning of the changes by submitting the PUF Application Adjustments Form (Form 04AL2.3c) to the School Finance Branch within 30 days of child's departure. The original budget total and ceiling will then be adjusted.
- 5. When a **child with a severe disability** 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 04AL2.3b, Statement of Actual Expenditure, as follows:
 - Complete one statement for all program unit **funded children** except those program unit funded children in **designated special education ECS programs**.
 - Complete a statement for <u>each</u> approved **designated special education ECS program**.

The form(s) must be returned to the School Finance Branch by October 31.

Revised

7.

If a **funded child** has a medical condition/disability which has not changed significantly since the initial diagnosis and was previously approved by Alberta Learning, 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 Learning.

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

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

Revised

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

Updated

8. A **funded child's** centre-based program hours and/or **home visits** must meet the child's needs. If a combined program of centre-based hours and **home visits** is provided, there must be <u>a minimum of four **home visits**</u> in order to be included in the ceiling calculation (see example of ceiling calculation). See definition of **Home Visit** in the Glossary of Terms.

Centre-based program hours are the number of instructional hours the child receives in a classroom setting at a centre or a school during the school year.

9. **Updated**

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 instructional programming for a **funded child** in a center-based program or a minimum of 36 **home visits** during the school year, or the equivalent combination of hours and visits.

Revised 10. 800 hours is the maximum number of centre-based program 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 **funded child's** needs. A written explanation of the need for the additional program hours must be submitted with the PUF application for approval by the Special Programs Branch. This exception will be subject to the ceiling amount.

11. PUF is supplemental to the Base Instruction funding. It is intended to cover the additional educational program costs required to meet the **funded child's** severe special needs.

When completing the budget for program unit costs, <u>budget amounts should</u> <u>approximate anticipated costs</u>. The following specifies the costs that may be included for PUF. Any exceptions to these costs should be discussed with Alberta Learning before submitting the application.

a) Instruction

Updated

- (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 **funded child(ren)** in the unit. 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 therapy, occupational therapy, physiotherapy, mobility training, special education consultation, psychological and other services, and assessment costs for part or all of the program which 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

<u>be considered</u>. **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.

Revised

Special Education Consultation is a service purchased by the **school authority** to provide programming support for the ECS teacher. Examples of services provided under Special Education Consultation include IPP development and implementation, 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 provides direct programming support. These costs will be subject to a maximum of \$1,500 per **funded child** based on a full-time program. For programs less than 800 hours, the \$1,500 maximum will be prorated based on the program hours and/or number of eligible **home visits**. For example, special education consultation costs for 475 hours and 6 **home visits** would be calculated as: $$1,500 \times (475 + 6) = $1,141$.

800 36

Revised

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 of costs and services associated with special educational consultation.

- (iii) Supplies and materials instructional supplies and materials which are particular to the **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 **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 Inservice costs for parents who attend in-province workshops, seminars, inservice 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 **funded child's** development. Costs in this category are usually in the \$100 \$400 range per **funded child**.
- c) Staff Inservice costs for teachers and teacher assistants who attend workshops, inservice, special courses and seminars related to staff responsibilities in the **funded child's** program and in parental assistance. Costs in this category are usually in the \$200 \$500 range per **funded child**. Personnel included in Services Purchased are not eligible for Staff Inservice.
- d) Transportation

Funding to urban and rural districts for transportation of **funded children** is available by submitting an application electronically under sections 1.19 (Rural), 1.21 (Special), 1.20 (Urban), and 1.22 (Metro). PUF will pay for any transportation costs for **children with severe disabilities** <u>not covered</u> by these Transportation grants. To determine

which transportation costs are 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 Finance Branch by November 30 and only **funded children** who were enrolled by September 30 are eligible.

i) Transportation to and from school: Transportation funding for these costs may be claimed by rural, urban and metro districts under section 1.21 for a funded child who requires special transportation; e.g. handi-bus, when, because of the severity of his or her disability or because of the funded child's age, the funded child cannot ride regular, rural or urban transportation or under section 1.19, 1.20, 1.21, 1.22 for a funded child who is transported by a regular bus. Transportation costs for children with severe disabilities 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 program unit funding;

Revised

- ii) <u>Home Visits</u>: Transportation funding for these costs may be claimed under section 1.21 by rural, urban and metro districts for each scheduled visit made by a member of the child's learning team to the home of a **funded child** identified as having **home visits** as part of his/her ECS program. Transportation costs in excess of the funding paid under sections 1.21 may be claimed as transportation costs under PUF;
- iii) Other Field Trips: Transportation costs for this area may be claimed as transportation costs under PUF. Field trips claimed must be those provided in addition to field trips for the regular ECS class or for a **funded child** who, because of his/her disability, requires special transportation on a regularly scheduled field trip; and
- iv) In-Program: Transportation costs for this area may be claimed as transportation costs under PUF. In-program transportation costs must be specified and must be for transportation of the **funded child** from one program to another program or agency as part of the **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.

Revised 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 expenditures for specialized furniture and equipment required to meet the special needs of the **funded child**, which are not available free or subsidized by another source.
 - i) For any major purchase, such as computer hardware, FM systems, etc., a written recommendation from an appropriate specialist is required indicating the necessity for the equipment. 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.

Revised

- 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 **funded child** remains the property of the **school jurisdiction**, not of the **funded child** or **parents** of the **funded child**. If a **funded child** changes **schools** in Alberta but continues to have use for the specialized furniture or equipment, the furniture or equipment goes with the **funded child**.
- v) Renovations to a building to be used for the benefit of all **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.

12. Designated Special Education ECS programs.

These are **ECS programs** where at least 70% of **funded children** enrolled have a severe disability. The following requirements apply for these programs:

- a) Prior approval is required to qualify for this status;
- b) Operators who qualify for this status may claim all education program costs except capital building costs;
- c) A budget based on the <u>total education program costs</u> 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:

Revised

- 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 funded child or a group of 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 Learning will apply all applicable revenues to the total program costs (such as 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 conditions and requirements outlined in Section 1.6, Program Unit Funding, of this Manual. These programs must also comply with the expectations outlined in the *Standards for Special Education* and the principles contained in Alberta Learning's *Kindergarten Statement (2000);*
- 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 for at least one year. 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.

Revised

- 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 04AL2.3a. This budget should outline all estimated expenditures and projected revenues; and
- j) The status of approved **designated special education ECS programs** may be reviewed and withdrawn at any time by Alberta Learning.

ADDITIONAL INFORMATION

- 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 Early Childhood Services 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 **funded child**.

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

	Calculation of the ceiling for an in-home based program of 10 home visits	a <u>combined program</u> based on 500 centre hours and 10
500 hrs x \$21,707 800 hrs = \$13,567	10 visits x \$21,707 36 visits = \$6,030	home visits 500 + 10 X \$21,707 800 36 = \$19,597

Note: If the 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 cost of most programs to be less than \$14,000 per funded child. Careful stewardship of funds by school jurisdictions is integral to the PUF program.
- 4. The decision to cluster or group **funded children** into a program unit for programming purposes should be based on the educational needs of the **funded children** involved. However, it is expected that whenever possible operators will cluster **funded children** with similar needs who receive services in the same setting and at the same time.
- 5. For a program unit with more than one **funded child**, the ceiling is calculated as follows:
 - Choose the funded child with the highest combination of hours and/or home visits.

Calculate the ceiling for this funded child as follows:

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

$$+ \left[\frac{\text{\# hours}}{800} + \frac{\text{\# visits}}{36} \right] \times \left[\frac{5,385}{36} \right]$$

Example

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

- funded child #1 has 500 hours and 10 home visits
- funded child #2 has 400 hours, no home visits
- funded child #3 has 600 hours and 4 home visits

The ceiling is then calculated as follows:

$$\begin{bmatrix} 500 \\ 800 \end{bmatrix} + \begin{bmatrix} 10 \\ 36 \end{bmatrix} \times \$21,707 = \$19,597$$

$$+ \begin{bmatrix} 400 \\ 800 \end{bmatrix} \times \$5,385 = \$2,693$$

$$+ \begin{bmatrix} 600 \\ 800 \end{bmatrix} + \begin{bmatrix} 4 \\ 36 \end{bmatrix} \times \$5,385 = \$4,637$$

$$= \text{Total ceiling for the unit} \$26,927$$

- Revised 6. 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 <u>lesser of:</u>
 - a. a pro-rated ceiling amount of approximately \$2,171 per month for the number of months the program runs; or
 - b. the ceiling amount based on the program hours and/or the number of **home visits** provided.

For example, the ceiling amount for a **funded child** in a four month program with 300 hours and 4 **home visits** would be calculated as follows:

Ceiling calculation for a 4 month program in a 10 month program year

Lesser of:

- a) $$21,707 \times 4/10 = $8,682 \text{ or}$
- b) \$21,707 X (300/800 + 4/36) = \$10,551

Ceiling amount is \$8,682

7. For **school jurisdictions** that are providing a program for a **child with a severe disability** in the regular ECS classroom:

The <u>Base Instruction funding</u>, 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** 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 <u>teacher salaries</u>, rent, utilities, and supplies. Since these costs would be incurred whether or not a **child with a severe disability** was in the program, they should not be included in the program unit expenditures. <u>Ordinarily</u>, teachers' salaries should not be included as program unit costs because the Base Instruction funding supports these costs.

- 8. For **school jurisdictions** contracting placement in a Day Care and for Day Cares with approved ECS status the following apply:
 - a) In circumstances where a **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 from PUF. The education component should reflect a typical education schedule.
 - b) Costs for childcare are not eligible to be claimed under PUF.
- 9. **School jurisdictions** may appeal PUF decisions by contacting the Director of the Special Programs Branch.

REFERENCES

ECS Program Unit Funding: A Handbook for ECS Operators

SECTION 1.7
SEVERE DISABILITIES FUNDING

ALLOCATION FORMULA

Number of profiled

Revised Severe Disabilities

Allocation

students with severe disabilities

Severe Disabilities

Rate

X

ALLOCATION CRITERIA

- 1. The relative weighting factor (see Funding Rates) is applied to the Learning Grant Rate to determine the Severe Disabilities rate.
- Funding will be 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 severe disabilities, provincial patterns of overall student enrolment growth and projections for growth of the numbers of students with severe disabilities.
- 3. Charter schools are funded on an eligible student with severe disabilities basis.
- 4. Students enrolled in a **blended program**, home education program or **on-line**New **programs** are not eligible for severe disabilities funding.

PROCEDURES, DOCUMENTATION AND REPORTING

 Funding for students with severe disabilities will be based on a jurisdiction profile number but all of the following requirements will need to be maintained and implemented at the school level;

New

- 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 severe disabilities** 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/codes and related definitions/criteria outlined in the Glossary of Terms, the *Standards for Special Education* and the *Handbook for Identification and Review of Students with Severe Disabilities* to determine a student's disabling condition for severe disabilities identification purposes.
- 5. **School jurisdictions** must report **students with severe disabilities** as at 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 over the course of 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.
- A school jurisdiction that <u>directs</u> a student with severe disabilities to another school authority is responsible for all educational program costs that are not covered by funding provided by Alberta Learning 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 private school including a DSEPS, are eligible for prorated funding based on the March 1 count. Alberta Learning will provide the prorated funding directly to the funded private school, including DSEPS if all funding requirements are met. School jurisdictions will not be required to transfer severe disabilities funding to the funded private school.
 - 4. **School jurisdictions** may request an audit of their severe disabilities profile if there are significant increases or decreases to the number of **students with severe disabilities** 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 levels of support and services being provided to the student. Students claimed for severe disabilities funding must receive three or more of the following levels of support:
 - i) a minimum 0.5 FTE one-to-one instruction/intervention (e.g., 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).

REFERENCES

Standards for Special Education

Handbook for the Identification and Review of Students with Severe Disabilities

ENGLISH AS A SECOND LANGUAGE (ESL) FUNDING

ALLOCATION FORMULA

ALLOCATION CRITERIA

- The relative weighting factor (see Funding Rates) is applied to the Learning 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 per cent 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.

7. **Funded students** enrolled in Home education, **blended programs**, **outreach programs** or **on-line programs** are not counted for funding under this section.

PROCEDURES, DOCUMENTATION AND REPORTING

- 1. September 30: Student registration information for ECS to grade12 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 303), Foreign-born (Code 301) and unfunded (Code 302) ESL students. This coding of ESL students is required for **school jurisdictions** to receive funding.
- New 2. March 1(excluding unfunded, code 302): Student registration for ECS to grade 12, ESL Canadian born and Foreign-born, as of March 1 and submitted to the Information Services Branch by March 4.
- New 3. **Francophone regional authorities** cannot claim both **Francisation** funding and ESL funding for the same child/student.
- New 4. See also, Section 1.25 for funding of Enhanced ESL and Support Services for Immigrant Students.

ALLOCATION FORMULA First Nations, Métis and Inuit (FNMI) = Education Allocation NEW Number of FNMI + Number of FTE FNMI children X FNMI Rate

ALLOCATION CRITERIA

- 1. The relative weighting factor (see Funding Rates) is applied to the Learning Grant Rate to determine the FNMI Rate.
- Updated 2. To determine the number of eligible FNMI students/children used to calculate FNMI Education Funding, school jurisdictions must choose to use either the Statistics Canada 2000-2001 census data or the number of self-identified funded children/students. School jurisdictions must notify, in writing, the Director of the School Finance Branch by October 15 advising him of their choice. If a school jurisdiction chooses to use the self-identified option, they should be aware that this choice is permanent.
 - 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.

PROCEDURES, DOCUMENTATION AND REPORTING

- 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 <u>reside off reserve</u> are funded by Alberta Learning and should be coded as follows:
 - 331 Aboriginal Learner Status Indian/First Nations
 - 332 Aboriginal Learner Non Status Indian/First Nations
 - 333 Aboriginal Learner Métis
 - 334 Aboriginal Learner Inuit

These students/children are self-identified and a signed declaration is required.

3. For further information or if you have questions regarding the collection activity, please contact the Information Services Help desk at (780) 427 - 5318

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 2004-2005 school Updated year is the first year of the Data Collection Initiative and involves the self-identification registration process being led by the Aboriginal Policies Sector, Alberta Learning. FNMI funding over the next 5 years 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%

Note: School jurisdictions must notify the Director of the School Finance Branch by October 15 –in writing- whether they choose to use the 2000-2001 Statistics Canada data or the number of self-identified funded children/students. If a school jurisdiction chooses to use the self-identified option, they should be aware that this choice is permanent.

2. First Nations students with Status who reside on 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

SECTION 1.10 SOCIO-ECONOMIC STATUS (SES) FUNDING

NEW

ALLOCATION FORMULA

ALLOCATION CRITERIA

- 1. The relative weighting factor (see Funding Rates) is applied to the Learning 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 five indicators provided by Statistics Canada:
 - a) percent of families living below the Low Income Cutoff (LICO),
 - b) average number of years of education of mothers,
 - c) transience rate, based on a student mobility rate,
 - d) percent of families headed by a lone parent, and
 - e) stability, based on the percent of households that rent living space.
- 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.

School Jurisdictions	SES Incidence Rates rounded to 3 decimals (as used in SAFRS/original Profiles)
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

PROCEDURES, DOCUMENTATION AND REPORTING

- 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**.

SECTION 1.11 SMALL SCHOOLS BY NECESSITY FUNDING

ALLOCATION FORMULA Small School by Necessity = a) + b) x # of small schools by / small schools by / necessity / schools

a) and b) are calculated using the formulas below. A small school by necessity is described in the ALLOCATION CRITERIA.

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;

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

- 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 the Peak Enrolment (see Table 1 below):

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	\$ 510	40	3.5
K to 6	\$ 1428	80	6.5
K to 9	\$ 1632	80	9.5
K to 12	\$ 2550	80	12.5

PLUS,

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

Where in the above formula,

AND.

TABLE 2

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.

Γ	School Type >=	School Rate	Peak Enrolment	Small School	# of Grades in the
ı	Peak Enrolment			*FTE funded	Grade
L				enrolment limits	Configuration
	K to 3	\$ 510	40	80	3.5
I	K to 6	\$ 1428	80	150	6.5
	K to 9	\$ 1632	80	220	9.5
Γ	K to 12	\$ 2550	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, outreach programs, on-line programs and Hutterite Colony Schools are not counted for funding under this section.
- 5. Beginning in the 2004-2005 school year **school jurisdictions** will receive Small Schools by Necessity funding for those schools closed that would have qualified as a Necessary Small School. The funding will be provided at a declining rate 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%

^{*} 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.

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

PROCEDURES, DOCUMENTATION AND REPORTING

- 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:
 - Outreach Schools
 - Home Education Schools
 - Religious Education School
 - Hutterite Colony Schools
 - Schools that serve mainly students/children with special needs
- Hockey/Dance Schools
- Institutional Program Schools
- On-Line Schools
- Language Schools
- French Immersion Schools

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

SECTION 1.12 INTRA-JURISDICTION DISTANCE FUNDING

NEW

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 <u>each</u> **school**:

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 <u>each</u> **school**:

Updated

* 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's 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 kilometer 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 Administration 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, **outreach programs**, **on-line programs**, **Institutions** and Hutterite Colony Schools are not counted for funding under this section.

- 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

 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.

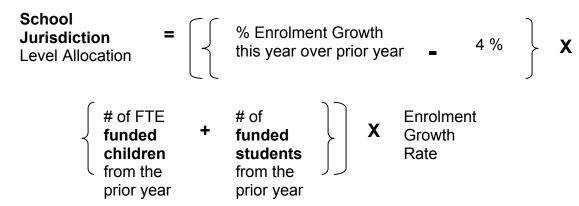
SECTION 1.13 ENROLMENT GROWTH FUNDING

ALLOCATION FORMULA

NEW

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**.

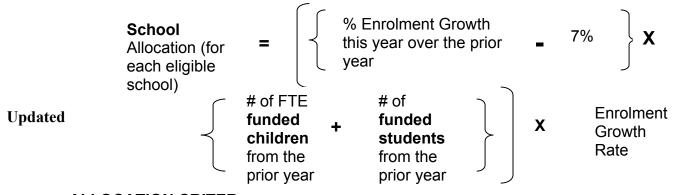


AND,

Updated

Updated

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.



ALLOCATION CRITERIA

Updated

- 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**.
- 2. **School jurisdictions** experiencing enrolment growth at the jurisdiction level of greater than 4 per cent from year-to-year are eligible for **school jurisdiction** level funding.

- 3. School jurisdictions with individual schools experiencing enrolment growth of greater than 7 per cent 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).
- 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.
- 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-toyear 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.

- 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 entitlement of school jurisdictions.

ADDITIONAL INFORMATION

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

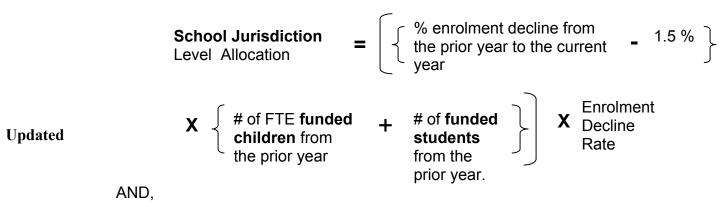
SECTION 1.14 ENROLMENT DECLINE FUNDING

ALLOCATION FORMULA

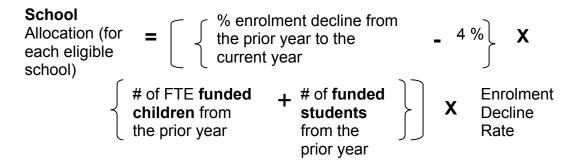
NEW

Enrolment Decline 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.



Updated 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.



Updated

ALLOCATION CRITERIA

Updated

- 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.
- 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 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).
- 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 included 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.

- 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.

NEW

ALLOCATION FORMULA

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

Small Board = Administration Allocation

a) \$408,000 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:

\$408,000
$$-$$
 \$408 \mathbf{x} FTE funded $-$ 2000 enrolment

OR,

c) \$56,100 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

 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.

PROCEDURES, DOCUMENTATION AND REPORTING

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. Students enrolled in Home education are not counted for funding under this section.

SECTION 1.16 NORTHERN ALLOWANCE FUNDING

NEW

ALLOCATION FORMULA

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. Grande 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.

^{*} 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.

- 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.

SECTION 1.17 RELATIVE COST OF PURCHASING GOODS AND SERVICES ADJUSTMENT (RCPA) FUNDING

NEW ALLOCATION FORMULA Updated RCPA Total Eligible Funding to Adjustment a school jurisdiction. Transportation **RCPA** Factor 20% x excludes Provincial 47% x and Boarding Allocation (Jurisdiction Priority, Boarding and funding RCPA Index Transportation funding

ALLOCATION CRITERIA

- 1. 20% is applied to the Total Eligible funding provided by Alberta Learning 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) and Transportation and Boarding funding (ECS to Grade 12).
 - 2. 47% is applied to all Transportation and Boarding funding (ECS to grade 12), provided by Alberta Learning to a **school jurisdiction** for a school year and adjusted by the RCPA Adjustment Factor.
 - The RCPA Adjustment factor is determined from the spatial price index developed by Alberta Economic Development and adjusted annually 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.

PROCEDURES, DOCUMENTATION AND REPORTING

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 differences 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 Regional Div No. 18	1.019	Lethbridge School 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 Reg Div No. 33	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 Reg 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 RCSRD 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		

SECTION 1.18 BOARDING FUNDING

ALLOCATION FORMULA

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

Funding Rate

ALLOCATION CRITERIA

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

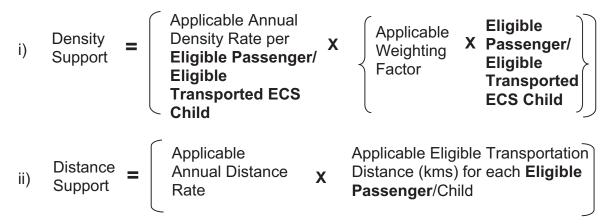
PROCEDURES, DOCUMENTATION AND REPORTING

- 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



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:

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

New c) <u>Cooperative Transportation</u>

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

Number of **eligible passengers** who are non-resident transported under agreement

X 50% of the transporting board's density rate

d) <u>Bus Modification or Purchase Allowance to Accommodate Wheelchair</u> Passengers

Refer to Section 1.21, Special Transportation.

ALLOCATION CRITERIA

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.

Revised 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 the 3% decrease.

Revised 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 that 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.
- Revised h) Students with severe disabilities who ride on a regular school bus, will be funded using a weighting factor of 3.
- Revised i) Students with disabilities who, because of the severity of their disability are unable to ride on a regular bus route and are transported by a school bus on a special route for students with disabilities may be claimed under this Section using the density and distance formula or under Section 1.21, whichever is most advantageous to the board.

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

3. <u>ECS Transportation</u>:

- a) A **school jurisdiction** that claims ECS Regular Transportation funding must transport, or make arrangements for the transport of **funded children** attending **ECS programs** at a service level that is consistent with the transportation of students under Section 51 (1) of the *School Act*.
- b) A **school jurisdiction** providing transportation to and from an **ECS program** may charge the **parent** of a **child** a fee for the transportation service. The total amount of fees charged to ECS **parents** for transportation services shall not exceed the total cost of the provision of ECS transportation services less the ECS transportation funding received from Alberta Learning.
- 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 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 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 facility or equipment for at least 18 consecutive weeks.
- b) Work Experience 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 1.20).
- 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;

New

- 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.

PROCEDURES, DOCUMENTATION AND REPORTING

- 1. Rural **school jurisdictions** are required to submit electronically a Rural Transportation claim form to the School Reporting Branch by November 30. Payment is made on the basis of the submitted information, the rural transportation funding rates, and in accordance with the *School Act* and the *Student Transportation Regulation*, A.R. 250/98; amended A.R. 197/2000.
- New 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.
 - 5. **School jurisdictions** are required to retain the following information on file for a minimum of three years and make it available for review by Alberta Learning upon request. Items a), b), c), and d) should be kept in an electronic file and made available to Alberta Learning either electronically or on a computer disc.

- **Revised** 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

Revised 1. First Nations students with status who reside on a reserve shall not be counted as eligible passengers.

ALLOCATION FORMULA

1. **Urban District** transportation:

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.

2. Francophone Authorities within an Urban Area:

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

ALLOCATION CRITERIA

- 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.
- New 2. For an **eligible passenger** or **eligible transported ECS child** of a city, town, village or hamlet with a population:
 - 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 (ie. 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.
- 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 cost of the provision of ECS transportation services less the ECS transportation funding the **school board** receives from Alberta Learning.
- 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 so transported that is equal to or greater than the number of students not resident within the attendance area or transportation service area and enrolled in that **school** shall be deducted from the number of **eligible passengers** claimed for funding under this section.

- 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 urban Francophone students being transported.
- 14. 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).
- 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;

 New • 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);
- 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.

- 1. **Urban districts** are required to submit electronically an Urban Transportation claims form to the School Reporting Branch by November 30. Payment is made on the basis of this submitted information, the Urban Transportation funding rates, and in accordance with the *School Act* and the *Student Transportation Regulation, A.R.* 250/98; amended A.R. 197/2000.
- New 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 three years and make it available for review by Alberta Learning upon request. Items a), b), c), and d) should be kept in an electronic file and made available to Alberta Learning either electronically or on a computer disc:
 - **Revised** 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);
 - 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;

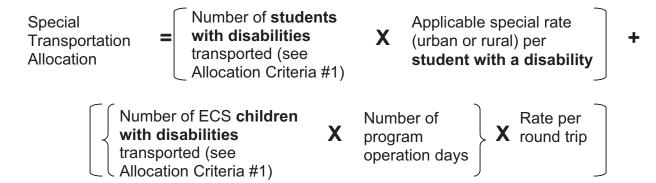
- h) Copies of current vehicle inspection certificates issued under the *Highway Traffic Act*; and
- i) Copies of contracts with:
 - i) operators of contracted **school busses** for regular transportation;
 - ii) parents providing transportation showing amounts paid.

ADDITIONAL INFORMATION

Revised 1. First Nations students with status who reside on a reserve shall not be counted as eligible passengers.

ALLOCATION FORMULA

a) Special Transportation:



b) Weekend Transportation:



Revised c) In

c) In-home Program Transportation:

d) <u>Bus Modification or Purchase Allowance to Accommodate Wheelchair</u> 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 disabilities who cannot, because of the severity of their disability, 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 funding under this 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** (ages 2.5 to 4.5 years), and **children with a mild or moderate disability** 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 disabilities** and **students with disabilities** who require special transportation between their residences or boarding places (boarding refers only to **students with disabilities**) and:
 - a) the **school** of a **school jurisdiction**;
 - b) a funded private school;
 - c) a private ECS operator; or
 - d) a program at an **institution** operated and/or funded by Alberta Learning:
 - (i) which the student with disabilities 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 disabilities** attending a **funded private school**, the **school jurisdiction** must have directed the student to attend that **school**.
- 6. Weekend Transportation
 - a) Weekend transportation support is paid to **school jurisdictions** when **students with disabilities** 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 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.

- 7. In-Home Program Transportation (**Funded children** only):
- Revised a) For the purposes of this section, in-home transportation means transportation for each scheduled visit made by a teacher, a child development specialist, or a teacher assistant to the home of a **child with a disability** enrolled in an in-home program.
- Revised b) In-home transportation funding will be paid according to the number of **home** visits as follows:
 - i) a minimum of 4 visits and a maximum of 36 visits for a program unit **funded child**
 - ii) a maximum of 22 visits for a child with a mild or moderate disability
 - 8. Transportation costs incurred for field trips or in-program activities cannot be claimed under this funding. These costs may be claimed for **children with severe disabilities** under Program Unit Funding.

- 1. Urban and rural **school jurisdictions** are required to submit electronically a Special Transportation and Boarding claim form to the School Reporting Branch by November 30. Payment is made on the basis of the submitted information, the funding rates and in accordance with the *School Act* and the *Student Transportation Regulation*, *A.R.* 250/98; amended A.R. 197/2000.
- New 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 three years and make it available for review by Alberta Learning upon request. Items a), b), and c) should be kept in an electronic file and be made available to Alberta Learning either electronically or on computer disc.
 - **Revised** 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) 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 disabilities** requiring special transportation.

ALLOCATION FORMULA

1a) The number of expected eligible passengers to be included in the metro urban transportation block funding formula is determined as follows:

	+		=	
(Residential Area X 75.80)		[Funded Students and Children (ECS - 12) X 0.7300]		
LESS:				
	X		=	
0.75 (# of ECS-Elem. Schools)		Lesser of: Average ECS-Elem. School size in the jurisdiction and average school size for the 4 jurisdictions.		
	Χ		=	
0.400 (# of Jr. High Schools)		Lesser of: Average Jr. High School size in the jurisdiction and average school size for the 4 jurisdictions.		
	Х		=	
0.250 (# of Sr. High Schools)	^	Lesser of: Average Sr. High School size in the jurisdiction and average school size for the 4 jurisdictions.		
		Expected Eligible Passengers	=	

1b) The metro urban transportation block funding a metro urban district may receive is determined as follows:

Metro Urban =		X	+		Х	
Transportation Funding	Expected Eligible Passengers	Metro Urban Transportation Block Rate	_	[0.8 X Severely Disabled Students (1-12)] (per Severe Disabilities profile)		Special Transportation Rate

- 1c) 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.
 - 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.
- Revised 7. ECS children with disabilities who require special transportation will be funded outside of the metro urban 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.

Metro urban districts are required to keep the following information on file and available for review by Alberta Learning:

- 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

- 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 Learning.
- 2. The basic block formula will continue for the 2004-2005 school year.

SECTION 1.23 FRANCISATION FUNDING

ALLOCATION FORMULA

Revised Francisation Allocation

Revised Francisation FTE funded children:
Canadian-born and Foreign-born

Eligible Francisation
FTE funded children:
Canadian born and Foreign-born

Francisation
Canadian born and
Foreign-born

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 or 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.
- 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 per cent 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 **Francisation 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.

- 1. Revised

 September 30: Student registration information for ECS to grade12 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.
- New 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 4.
- New 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.

SECTION 1.24
STABILIZATION FUNDING

NEW

ALLOCATION FORMULA

Stabilization Allocation

Total Eligible Funding under the renewed Funding Framework Total Eligible Funding under the Previous Funding Framework (adjusted)

ALLOCATION CRITERIA

- 1. The 2003-2004 school year total eligible funding from Alberta Learning is the base amount from which Stabilization funding will be determined. This base amount will be estimated in September 2004 and finalized in January 2005 when actual funding for the 2003-2004 school year is complete.
- 2. The established 2003-2004 base 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.

EXAMPLE STABILIZATION FUNDING

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

2002 2004 Page Vee	r Coloulation			
2003-2004 Base Year Calculation				
	Total Eligible Funding			
Current Framework:	\$35,912,000			
RFF:	\$34,612,000			
Stabilization Funding	\$1,300,000			
* Before funding rate increase fo	r 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	Χ	5100	Х	1.02	=_	\$1,326,000
		5100				
2005-2006:						
\$1,326,000	Х	5050	Х	1.02	=_	\$1,339,260
		5100				<u>-</u>

Updated 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
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/Francisation 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

2004-2005 FUNDING MANUAL FOR SCHOOL AUTHORITIES

SCHOOL JURISDICTIONS

SECTION 1.25 ENHANCED ESL/FRANCISATION AND SUPPORT SERVICES FOR IMMIGRANT STUDENTS FUNDING

NEW

ALLOCATION FORMULA

Enhanced ESL and Eligible ESL FTE *Eligible Francisation ESL and funded children and FTE funded children Support Services for Support and funded students: Services **Immigrant Students** funded students: Allocation Foreign-born Rate Foreign-born

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 per cent 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 Updated** funding and Enhanced ESL funding for the same child/student.

^{*}Applies to Francophone regional authorities only.

SECTION 1.26 CHARTER SCHOOLS FUNDING

ALLOCATION FORMULA

Revised The formulas and requirements for funding that apply to school jurisdictions under Part 1; 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. The Infrastructure Maintenance Program and school capital program administered by Alberta Infrastructure do not apply to charter schools.

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 funding 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.

PROCEDURES, DOCUMENTATION AND REPORTING

- Revised 1. To claim funding and receive payment from Alberta Learning, 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**.
- New 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

Revised 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.

Revised

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 cannot be accommodated by a 475-hour program (ie. they may require more or fewer hours). Also some **special needs children**, either because of their disability or young age, may benefit from an in-home program or from a combined program involving school hours and **home visits**. A combined program must have a minimum of 4 **home visits** to qualify for funding See definition of **home visit** 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 <u>child</u> 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** attended 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 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 Learning 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 Learning will not provide more than one year of funding for a regular ECS funded child.
- 6. An ECS **child with a disability** may qualify for more than one year of funding. See definition of **funded child** in the Glossary of Terms.
- 7. Alberta Learning 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 the additional hours.
- 10. 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 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.
 - 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. All individuals who are age 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.

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.

- 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 or severe) 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.
- New 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.

REQUIREMENTS

1. New Private ECS Operators

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

2. Existing Private ECS Operators

The form "Notice of Intent to Operate" will be sent to **private ECS operators** by their respective Zone Services Branch in June. **Private ECS operators** may be required to provide documentation such as the current status of their Certificate of Incorporation and proof that their facility meets fire and health safety standards.

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.

New 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 **private schools** 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 private schools must send a list of any teaching staff changes to their respective Zone Services Branch by September 20.
- 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 Learning 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.
- Revised 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 04AL1.2c) and submit to the School Finance Branch or submit the data using the Funding Events System (FES) before April 29.

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;

Revised

Alberta Learning 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 good repair. Alberta Infrastructure is responsible for the disposition of a portable if it is no longer required or of the cost of maintenance and repair can no longer be justified.

2. Cancopy:

Alberta Learning has an agreement with the Canadian Copyright Licensing Agency (Cancopy). Most **schools** in the province are covered in the license. Alberta Learning 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 Learning simplify current data management and exchange processes.

Alberta Learning will deduct 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 October funding statement. It is up to the individual **private ECS operators** to apply for any GST rebate from the Government of Canada.

Alberta Learning 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 it is not sufficient enough to pay for significant changes to the software.

REFERENCES

Advisory Manual on Early Childhood Service (1996)

Kindergarten Program Statement

Early Childhood Services Policy 1.1.3

Early Childhood Services Regulation AR 31/2002

School Capital Manual, Alberta Infrastructure, April 2002

SECTION 2.2
MILD OR MODERATE DISABILITIES AND
GIFTED AND TALENTED FUNDING

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 and funded children who are gifted and talented.

CONDITIONS

- Funding is paid to an ECS operator to meet the educational needs of children with mild or moderate disabilities and funded children who are gifted and talented for a maximum of two years funding. 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 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 one (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

- Revised 1. Special needs funding is based upon **funded child** registration information submitted to the Information Services Branch by October 5. Funded **children** must be coded using exceptional student Code 30 for **children with mild or moderate disabilities** 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 Learning Student Registration Form to receive this funding.
 - Recent assessment documentation to support each funded child's designation and identification as a child with a mild or moderate disability or a funded child who is gifted and talented must be kept on file by the ECS operator.
 - 3. An individualized program plan (IPP) for each child with a mild or moderate disability or a funded child who is gifted and talented is to be developed, implemented and regularly revised and kept on file by the ECS operator. 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 the teacher.

- Revised 4. For **funded children** who have been assessed as having a mild or moderate disability 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 04AL1.2c) must be completed and submitted to School Finance by April 29 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** or **funded children** who are gifted and talented.

CONSIDERATIONS

- Funding for children with mild or moderate disabilities or funded children who
 are gifted and talented is calculated by multiplying the number of children with mild
 or moderate disabilities 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** and **funded children** who are gifted and talented may be monitored by Alberta Learning.

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

SECTION 2.3 PROGRAM UNIT FUNDING

UNDER REVIEW

PURPOSE

This funding provides for individual programs for **children with severe disabilities** 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** 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/codes and related definitions/criteria outlined in **students/ECS children with severe disabilities** in the Glossary of Terms to determine a **funded child's** disabling condition for PUF eligibility purposes.
- 5. A **funded child** receiving PUF is not eligible for ECS mild/moderate funding.
- 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 <u>all</u> of the following:
- **Revised** a) a diagnosis of a disability/condition at the severe/profound level by qualified personnel (note: a diagnosis alone is not sufficient to qualify for funding);
 - b) documentation/assessments of the **funded child's** current level of functioning in the learning 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.

Revised

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

REQUIREMENTS

A PUF application must be submitted (Form 04AL2.3a) to the School Finance Branch 1. by January 1. Payment is based on approval of this application. Applications may be submitted either on paper or using the Program Unit Funding System (PUFS). A Revised 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. The assessment information must be sent to the Special Programs Branch for pre-approval.

> 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. 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 funded child; and
 - b) formal assessment documentation to support the severity of each 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 home visits conducted over the year; and
 - e) current budget information.
- Applications for funded children who are diagnosed or registered after January 1 will 3. be accepted until May 1, using the process described in #1.

Updated

When a **funded child** leaves a program before the end date specified on a PUF application please notify Alberta Learning of the changes by submitting the PUF Application Adjustments Form (Form 04AL2.3c) to the School Finance Branch within 30 days of child's departure. The original budget total and ceiling will then be adjusted.

- 5. When a **child with a severe disability** 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 in the schedule pertaining to Early Childhood Services Program Unit Expenditures in the Audited Financial Statements which are due November 30.
- 7. If a **funded child** has a medical condition/disability which has not changed significantly since the initial diagnosis and was previously approved by Alberta Learning, 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 Learning.

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

- a statement from the appropriate professional that the **funded child** continues to demonstrate a severe disability;
- description of the necessary supports and services the funded child requires as a result of the disability;
- description of the impact of the disability on the 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** who are uncertain about the eligibility of a **funded child** are encouraged to contact the Special Programs Branch for confirmation of eligibility.

8. A **funded child's** centre-based program hours and/or **home visits** must meet the child's needs. If a combined program of centre-based hours and **home visits** is provided, there must be <u>a minimum of four **home visits**</u> in order to be included in the ceiling calculation (see example of ceiling calculation). See definition of **Home Visit** in the Glossary of Terms.

Centre-based program hours are the number of instructional hours the child receives in a classroom setting at a centre or a school during the school year.

- 9. 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 instructional programming for a **funded child** in a center-based program or a minimum of 36 **home visits** or the equivalent combination of hours and visits.
- 10. 800 hours is the maximum number of centre-based program 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 **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.

11. PUF is supplemental to the Base Instruction funding. It is intended to cover the additional educational program costs required to meet the **funded child's** severe special needs.

When completing the budget for program unit costs, <u>budget amounts should</u> <u>approximate anticipated costs</u>. The following specifies the costs that may be included for PUF. Any exception to these costs should be discussed with Alberta Learning before submitting the application.

- a) Instruction
- (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 **funded children** in the unit. 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 Consideration #7 on page 11 of this section).
 - (ii) Services Purchased includes services of qualified personnel in the areas of speech therapy, occupational therapy, physiotherapy, mobility training, special education consultation, psychological and other services, and assessment costs for part or all of the program which 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

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<u>delivery should be considered</u>. 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.

Revised

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 IPP development and implementation, 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 **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/or number of eligible **home visits**. For example, special education consultation costs for 475 hours and 6 **home visits** would be calculated as: $$1,500 \times (475 + 6) = $1,141$.

Revised

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 instructional supplies and materials which are particular to the **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 **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 Inservice costs for parents who attend <u>in-province</u> workshops, seminars, inservice 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 **funded child's** development. Costs in this category are usually in the \$100 \$400 range per **funded child**.
- c) Staff Inservice costs for teachers and teacher assistants who attend workshops, inservice, special courses and seminars related to staff responsibilities in the **funded child's** program and in parental assistance. Costs in this category are usually in the \$200 \$500 range per **funded child**. Personnel included in Services Purchased are not eligible for Staff Inservice.
- d) Transportation

Funding for transportation of **funded children** is available by separate application (using form 04AL2.4) through ECS Special Needs Transportation Funding (Section 2.5) and through ECS Regular Transportation Funding (Section 2.4).

PUF will pay for any transportation costs <u>not covered</u> by these Transportation grants. To determine which transportation costs are 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 School Finance by November 30 and only **funded children** who were enrolled by September 30 are eligible.

i) <u>Transportation to and from school</u>: Transportation funding for these costs may be claimed under section 2.5 for a **funded child** who requires special transportation; e.g. handi-bus, when, because of the severity of his or her disability or because of the **funded child's** age, the **funded child** cannot ride regular transportation or be transported under section 2.4 by a regular bus. Transportation costs for **children with severe disabilities** in excess of the funding paid under section 2.4 or 2.5 may be claimed as transportation costs under program unit funding;

Revised

- ii) <u>Home Visits</u>: Transportation funding for these costs may be claimed under section 2.5 for each scheduled visit made by a member of the child's learning team to the home of a **funded child** identified as having **home visits** as part of his/her ECS program. Funding provided under section 2.5 is based on the number of **home visits** up to a maximum of 36 visits. 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 this area may be claimed as transportation costs under PUF. Field trips claimed must be those provided in addition to field trips for the regular ECS class or for a **funded child** who, because of his/her disability, requires special transportation on a regularly scheduled field trip; and
- iv) In-Program: Transportation costs for this area may be claimed as transportation costs under PUF. In-program transportation costs must be specified and must be for transportation of the **funded child** from one program to another program or agency as part of the 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.

Revised f) Administration

Funding for this area is provided under Section 2.10 – ECS Administration funding. Costs for this category may not be claimed on the PUF budget.

- g) Capital: Furniture and Equipment expenditures for specialized furniture and equipment required to meet the special needs of the **funded child**, which are not available free or subsidized by another source.
 - i) For any major purchase, such as computer hardware, FM systems, etc., a written recommendation from an appropriate specialist is required indicating the necessity for the equipment. 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 **funded child** remains the property of the **private ECS operator**, not of the **funded child** or **parents** of the **funded child**. If a **funded child** changes **schools** in Alberta but continues to have use for the specialized furniture or equipment, the furniture or equipment goes with the **funded child**.
 - v) Renovations to a building to be used for the benefit of all **funded children** in the instructional area are not eligible for support under this section.
 - vi) Administrative capital purchases cannot be claimed under this category.

12. Designated Special Education ECS programs.

These are **ECS programs** where at least 70% of **funded children** enrolled have a severe disability. The following requirements apply for these programs:

- a) Prior approval is required to qualify for this status;
- b) Operators who qualify for this status may claim all education program costs except capital building costs;
- A budget based on the <u>total education program costs</u> must be submitted on the program unit funding application budget page for **designated special education ECS programs**;

Revised 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:

- Revised 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 **funded child** or a group of **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 Learning will apply all applicable revenues to the total program costs (such as 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 outlined in Section 2.3, Program Unit Funding, of the Funding Manual. These programs must also comply with the expectations outlined in the *Standards for Special Education* and the principles contained in Alberta Learning's *Kindergarten Statement* (2000);
 - i) Applications for new programs must be submitted as a proposal to the Director of the Special Programs Branch by June 1,2004 for approval. To be considered for this designated status, the program must have operated for at least one year. 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.
 - Revised 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 04AL2.3a. This budget should outline all estimated expenditures and projected revenues; and
 - j) The status of approved **designated special education ECS programs** may be reviewed and withdrawn at any time by Alberta Learning.

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 Early Childhood Services 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 a centre-based program, an in-home program and a program based on a combination of centre hours and **home visits** is determined as follows:

	Calculation of the ceiling for an in-home based program of 10 home visits	
500 hrs x \$21,707 800 hrs = \$13,567	10 visits x \$21,707 36 visits = \$6,030	home visits 500 + 10 X \$21,707 800 36 = \$19,597

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 to be less than \$14,000 per funded child. Careful stewardship of funds by private ECS operators is integral to the PUF program.
- 4. The decision to cluster or group **funded children** into a program unit for programming purposes should be based on the educational needs of the **funded children** involved. However, it is expected that operators will cluster **funded children** with similar needs who receive services in the same setting and at the same time whenever possible.
- 5. For a program unit with more than one **funded child**, the ceiling is calculated as follows:
 - Choose the funded child with the highest combination of hours and/or home visits.

Calculate the ceiling for this funded child as follows:

$$\left\{ \frac{\text{\# hours}}{800} + \frac{\text{\# visits}}{36} \right\} x \qquad \$21,707$$

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

$$+ \left\{ \frac{\text{\# hours}}{800} + \frac{\text{\# visits}}{36} \right\} x \qquad \$5,385$$

Example:

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

- funded child #1 has 500 hours and 10 home visits
- funded child #2 has 400 hours, no home visits
- funded child #3 has 600 hours and 4 home visits

The ceiling is then calculated as follows:

$$\begin{bmatrix} 500 \\ 800 \end{bmatrix} + \begin{bmatrix} 10 \\ 36 \end{bmatrix} \times \$21,707 = \$19,597$$

$$+ \begin{bmatrix} 400 \\ 800 \end{bmatrix} \times \$5,385 = \$2,693$$

$$+ \begin{bmatrix} 600 \\ 800 \end{bmatrix} + \begin{bmatrix} 4 \\ 36 \end{bmatrix} \times \$5,385 = \$4,637$$

$$= \text{Total ceiling for the unit} \$26,927$$

- 6. 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. a pro-rated ceiling amount of approximately \$2,171 per month for the number of months the program runs; or
- **Revised** b. the ceiling amount based on the program hours and/or the number of **home visits** provided.

For example, the ceiling amount for a **funded child** in a four month program with 300 hours and 4 **home visits** would be calculated as follows:

Ceiling calculation for a 4 month program in a 10 month program year

Lesser of:

- a) $$21,707 \times 4/10 = $8,682$ or
- b) \$21,707 X (300/800 + 4/36) = \$10,551

Ceiling amount is \$8,682

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

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

- 8. For **ECS operators** contracting placement in a Day Care and for Day Cares with approved ECS status the following apply:
 - a) In circumstances where a **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 <u>only for the education component portion of the day</u> may be claimed from PUF. The education component should reflect a typical education schedule.
 - b) Costs for childcare are not eligible to be claimed under PUF.
- 9. **ECS operators** may appeal PUF decisions by contacting the Director of the Special Programs Branch.

REFERENCES

ECS Program Unit Funding: A Handbook for ECS Operators

PURPOSE

This funding enables **private ECS operators** to provide transportation for **funded 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 will be eligible for transportation funding.
- 2. A child with special needs (mild, moderate or severe) who requires transportation to and from school (Condition #1 does not apply for these children) 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**.
- 2. If the transportation of **funded children** 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 **funded children**.
- 3. To apply for regular ECS transportation funding, private ECS operators are required to submit to School Finance by November 30, Form 04AL2.4, Early Childhood Services Transportation application. 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.
- 4. For ECS programs beginning in September, the count date for transportation funding is September 30.

- 5. <u>For ECS programs beginning after September 30</u>, the **count date** for transportation will be the last **operating day** of the month in which the program begins. Form 04AL2.4 must be submitted to School Finance within three weeks of that date.
- 6. **Funded 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 **funded child** eligible for transportation and transported by:
 - i) a **school bus**;
 - ii) a **public transit system**; or
 - iii) a parent where the private ECS operator does not provide bus services.
- Private ECS operators may enter into agreements with school jurisdictions for the transportation of funded 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 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 Learning.
- 4. Regular transportation funding is calculated by multiplying the number of **eligible transported ECS children** by the regular transportation rate for **private ECS operators**.

SECTION 2.5
SPECIAL TRANSPORTATION FUNDING

PURPOSE

Revised

This funding is provided to **private ECS operators** for the transportation of **children with disabilities** 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 an in-home program.

CONDITIONS

- 1. Special Transportation
 - a) Private ECS Operators may receive special transportation funding for ECS children with disabilities 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 severe disabilities** (ages 2.5 to 4.5), and **children with mild or moderate disabilities** 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.
- 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.
- **Revised** 3. In-home Program Transportation
 - a) For the purpose of this section, in-home transportation means transportation for each scheduled visit made by a teacher, a child development specialist, or a teacher assistant to the home of a **child with a disability** enrolled in an in-home program.
 - b) In-home transportation funding will not be paid for more than the following number of visits to any one home during a program period:
 - i) a minimum of 4 visits to a maximum of 36 visits in the case of a program unit **funded child**, or
 - ii) 22 visits in the case of a child with a mild or moderate disability.

 Transportation costs incurred for field trips or in-program activities cannot be claimed under this funding. For children with severe disabilities these costs may be claimed under Program Unit Funding.

REQUIREMENTS

- 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.
- 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. **Private ECS operators** must submit to School Finance, by November 30, Form 04AL2.4, the **Early Childhood Services** Transportation (Regular and Special) application form.

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 program operation days. The total transportation days are multiplied by the special transportation rate. **Private ECS operators** must return the completed form to School Finance.

Revised Funding for **home visits** made by a teacher or other professional is calculated by multiplying the number of scheduled **home visits** by the special transportation rate.

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

For **ECS programs** beginning in September:

5. The **count date** for transportation funding is September 30. The completed form 04AL2.4 must be submitted to the School Finance Branch by November 30.

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

- 6. The **count date** for transportation will be the last **operating day** in the month in which the program begins. Form 04AL2.4 must be submitted to School Finance within three weeks of that **count date**.
- 7. ECS children with special needs registered after the count date are not eligible for special transportation funding. Transportation costs for ECS children with severe disabilities eligible to receive PUF may be claimed as a Program Unit expense.

CONSIDERATIONS

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 Learning.

PLANT OPERATIONS AND MAINTENANCE FUNDING

PURPOSE

This funding, provided to **private ECS operators**, is for the maintenance and operations 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 Learning determines an operator's eligible funding using funded enrolment information.

CONSIDERATIONS

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

```
(# funded children x rate per funded child) + (Area rate per 25 funded children) = (15 \times \$237) + (\$474) = \$4,029
```

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

```
(40 x $237) + [$474 x 2] $474 is provided for every 25 funded children or portion of 25 funded children = $10,428
```

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

PURPOSE

This funding is provided to assist **private ECS operators** with the increased cost of certificated salaries and benefits. The funding is supplemental to Basic Instruction funding.

CONDITIONS

- The amount of Teacher Salary Enhancement (TSE) funding for the 2004-2005 school year will be equal to the amount the **private ECS Operator** received for the 2003-2004 school year.
- 2. This funding may only be utilized for certificated salaries and benefits costs. It may not be used for other types of costs.

REQUIREMENTS

- 1. **Private ECS operators** that received TSE funding in 2003-2004 are not required to apply for 2004-2005 funding. Alberta Learning will provide the funding based on the 2003-2004 funding amount.
- 2. **Private ECS operators** that did not receive TSE funding in 2003-2004 should apply to the Director of School Finance for 2004-2005 funding.

PURPOSE

This funding provides for special programs and services to meet the learner requirements of **children** who are economically or socially disadvantaged.

CONDITIONS

- Revised 1. Private ECS operators that received Program Enhancement Project (PEP) funding in 2003-2004 will be eligible to continue to receive this funding for 2004-2005. No new applications will be accepted for 2004-2005.
 - 2. **Designated Special Education ECS Programs** are not eligible for PEP funding

CONSIDERATIONS

- **ECS operators** may use PEP funding to provide additional hours of ECS instruction and compensatory programming aimed at raising the preparedness and performance of **children** to the level of **children** in regular programs. The compensatory programming should enhance the children's potential for coping and succeeding in school.
- 2. The coordinated delivery of interventions will be enhanced by collaboration with community-based government and private agencies, local schools and families. Specific attention should be given to the transition from ECS to grade 1.

SECTION 2.9 EARLY LITERACY FUNDING

PURPOSE

This funding is provided to address the needs of **children** in **Early Childhood Services** (**ECS**) **programs** who are experiencing difficulties in developing reading readiness and early literacy skills. This will provide **private ECS operators** 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 **children** identified as at risk. This funding will also provide for early literacy resources and in-service for ECS teachers, other staff and volunteers deployed as part of the **private ECS operator's** early literacy program.

CONDITIONS

- 1. A **private ECS operator** may receive Early Literacy funding for programs provided for **children** enrolled in an **ECS program**.
- 2. In order to access funding, a **private ECS operator** must indicate on their Notice of Intent they are providing an Early Literacy program.
- 3. Funding will be based on the current year enrolment with a minimum of \$1200 available to each **private ECS operator**.
- 4. **Private ECS operators** must use the funding provided for additional human resources, the assessment and diagnosis of **children**, the acquisition of early literacy resources, or to provide in-service for **parents**, and for ECS teachers, or other staff that may be deployed as part of the Early Literacy program.
- 5. If a **private ECS operator** receives minimum funding, there is no requirement to hire additional human resources for the Early Literacy program. Smaller **ECS operators** are encouraged to work with other **school authorities** to purchase or co-ordinate Early Literacy services for their **children**.

REQUIREMENTS

- A private ECS operator that receives funding for Early Literacy must provide the program and, unless Condition 5 (above) applies, must ensure that there is flexibility in delivery of the program so that all children who need early literacy assistance have access to the program.
- 2. A **private ECS operator** that receives funding for Early Literacy must employ additional human resources unless Condition 5 applies. Such additional staffing shall be under employment conditions that the **ECS operator** deems most appropriate.
- 3. A **private ECS operator** shall ensure its records document that the funding allocated under this section has been expended for the purposes for which it was intended. A **private ECS operator** will be required to report revenues and expenditures in the audited financial statements.

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 Learning for:
 - a) base instruction;
 - b) special needs funding (including mild/moderate funding, program enhancement project funding, and finalized program unit funding);
 - c) transportation (special and regular);
 - d) plant operation and maintenance, and
 - e) early literacy.

REQUIREMENTS

1. An **ECS operator** is not required to apply for administration funding; Alberta Learning determines an **ECS operator's** eligible funding using information on student enrolments and funding that Alberta Learning 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 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 timetabled for both the student and teacher per high school credit.
- 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 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 old 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. **Course Completions for Students in Grades 10 to 12**

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

Courses delivered to students and claimed for funding must meet the conditions in this Funding Manual and must also comply with all other Alberta Learning 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 teacher 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.

For diploma examination courses condition 7(a) also applies to the schoolawarded 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:

Revised

- 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 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.

Revised

- 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 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:
 - 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 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 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.

8. 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, evenings (after 6:00 p.m.), and the summer months, 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 private school** for students whose marks are reported by the ADLC.
 - d) Funding is provided for RAP, Work Experience, Special Projects 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);
 - g) Funding is provided for credits earned through locally developed senior high school credit courses, where instruction is provided;
 - h) Funding is provided for credit-bearing religious education courses, where instruction is provided;
 - i) Funding is provided for credits in Special Projects 10 20 30 courses;
 - j) Funding is provided for students in senior high school who take full year junior high courses; the equivalent of 5 CEUs will be funded for each course completed (form 04AL1.2a);
- Revised k) For students with special needs who are 15 years of age or older on September 1 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.
 - I) 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 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 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;

9. 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 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 or co-curricular activities, such as competing on an athletic team.
- 10. 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 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)
- 11. A funded private school must keep in force a blanket fidelity bond with respect to the private school for all employees and board members in an amount acceptable to the Minister. The amount that is acceptable to the Minister shall be \$50,000 or the amount of the accumulated surplus plus 40 percent of Alberta Learning 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.

- 12. a) To receive funding, a **private school** must have seven (7) full-time equivalent or more students from two (2) or more families enrolled (does not include ECS children) who continue to be enrolled in the **school**.
 - b) A **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**.
 - 13. Payments to a newly qualifying **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 **private school** fails to meet one or more funding conditions.
 - 14. Where the enrolment in a **private school** drops by more than fifty (50) percent in a **school** year, the **Minister** may authorize a reduction in payments due the **school**.

REQUIREMENTS

1) New funded private schools

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

- a) a Certificate of Incorporation under the *Societies Act* or a non-profit company registered under Part 9 of the *Companies Act* or a special act of the Legislature;
- b) documented proof that their **facility** meets all applicable municipal and provincial public health, safety and building standards requirements; and

c) a signed declaration that the program will operate in accordance with the *School Act*, Section 28.

2) Existing funded private schools

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

New The AOP incorporates the *Learning Grants Regulations* and the operator is bound by all the provisions of that Regulation including the right of Alberta Learning 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 Learning of any changes in any information contained in the AOP.

- 3) **Funded private schools** must complete and return the "AOP", to their respective Zone Services Branch or complete an electronic version through the Extranet by May 31. Information on this form initiates the first payment of the coming school year.
 - 4) All **funded private schools** must advise their respective Zone Services Branch within one week of any changes which occur in **facility**, society, or programs during the school year.
 - 5) Accredited **private schools** must send an updated list of teaching staff (based on teachers employed as of September 15) to their respective Zone Services Branch by September 19, including those who have been hired subsequent to May 31. Any changes to teaching staff after September 15, should be submitted to their respective Zone Services 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 04AL1.2b for students attending First Nations schools.
- d) Student information on Form 04AL1.2a for senior high students taking junior high courses.
- 7) Base instruction funding for a **funded private school** is calculated as follows:
 - a) For grades 1 to 9, by multiplying the number of **funded students** enrolled on the **count date** by the Base Instruction rate; and
 - b) For grades 10 to 12, by multiplying the completed CEUs by the CEU rate, with a maximum of 60 CEUs per student per school year (Sept. to Aug.).
- 8) Adjustments to 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.
- Revised b) After receiving your first RACERS data, any modification required can be submitted using the "Add, Modify, Delete" form (Form 04AL1.2c) or submitted using the Funding Events System (FES) before the April 29 deadline.
- New 9) Refer to Section 7.7 for additional information on Enrolment Counts and Conflicts.

CONSIDERATIONS

 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 Learning.

FEES AND DEDUCTIONS:

1. Cancopy:

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

2. Edulink:

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

The Council 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 Learning will deduct 35¢ plus GST per funded student and funded child on behalf of all participating funded private schools. This deduction will be made in September and based on the prior year frozen funded student and funded child count. The deduction will be reflected on the October funding statement. It is up to the individual funded private schools to apply for any GST rebate from the Government of Canada.

Alberta Learning 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.

PURPOSE

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

CONDITIONS

- Funding is provided for students with special needs, who meet Alberta Learning special education eligibility criteria, who were enrolled on September 30. Regular students attending the DSEPS with a sibling(s) at the DSEPS 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 Learning, by May 31 for the upcoming school year. The Director will review the request to determine if the operator meets or exceeds Alberta Learning standards for special education programming and that students attending the **school** meet eligibility requirements for special education. The designation as a special education private school will be reviewed annually.

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 May 31.

- 3. A **school jurisdiction** that directs a student to a **DSEPS** will pay all program costs that are not covered by funding provided by Alberta Learning to the **DSEPS**.
- **Updated** 4. For students with severe disabilities attending a **DSEPS**, instruction funding of \$5,683 and severe disabilities funding will be provided to the **DSEPS**.
- Revised 5. 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** should 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. The following three requirements constitute a **parent** consultation:

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 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**.

When a student with a mild or moderate disability or who is gifted and talented is enrolled in a **DSEPS**, and who's parent consulted with the **resident board**, funding of \$9,125 per student will be paid directly to the **DSEPS**, with no cost to the **resident board** if enrolment occurs on or before September 30.

The **resident board** official should retain a record of the discussion to confirm that **parents** 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** consulted with them on their special needs child's programming options.

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).

- 6. If a **parent** enrolls their child with mild or moderate disabilities or a child who is gifted or talented 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 \$5,683 (rather than funding of \$9,125) per student. These students will 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.
- 7. The **DSEPS** shall report all students enrolled on September 30 in their **school** to the Information Services Branch by October 5.
- 8. **DSEPS** must also notify school **boards**, in writing, of the board's **resident students** who are registered at the **DSEPS**. This list should indicate:
 - Which students' parents consulted with the resident board on the special education programming options for their funded student prior to enrollment at the DSEPS; and

- Which students are newly enrolled; and
- Which students currently attending who were enrolled in previous years.

Revised

A copy of this notification list must also be sent to the Director of School Finance, Alberta Learning 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 Learning's payment to the **DSEPS**.

- The higher 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**.
- 10. Updated/
 Revised 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 Learning to the DSEPS for students enrolled after September 30.

PURPOSE

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

CONDITIONS

Revised 1

- Funded private schools will use the severe disabilities categories/codes and related definitions/criteria in the Glossary of Terms to identify a student's disabling condition and the current impact on learning for severe disabilities funding eligibility purposes.
- 2. Severe disability funding for students special needs attending a funded private school, including Designated Special Education Private Schools (DSEPS) will be based on September 30 enrolments as reported by the funded private school to the Information Services Branch. Severe disability funding will be paid directly to the DSEPS and funded private school for eligible students with a severe disability.

Revised 3.

- 3. The eligibility of new students will be audited by Alberta Learning in the first year they are claimed for funding by the private school. Once a student is approved for severe disabilities funding, a review audit for eligibility by Alberta Learning will occur no more than every three years unless otherwise required to maintain funding.
- 4. Severe disability funding for a **funded private school** is calculated by multiplying the number of eligible **students with severe disabilities** by the severe disabilities funding rate.
- 5. **Funded private schools** providing an approved institutional program may not claim severe disabilities funding for **students with severe disabilities** who are funded through **institution** program funding.
- New 6. Students enrolled in an **on-line program**, **blended program** or a home education program are not eligible for severe disability funding.

REQUIREMENTS

Revised 1

 Funded private schools must develop and implement an individualized program plan (IPP) supported by appropriate medical, psychiatric, psychological 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 levels of support and services being provided to the student.
 Students claimed for this funding must receive three or more of the following levels of support:
 - i) a minimum of .5 FTE one-on-one instruction/intervention (e.g., teacher and/or teaching assistant time);
 - 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).
- 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 Private schools (including DSEPS) must send the electronic Special Programs Branch Report that lists the students identified with severe disabilities.
 - 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 private school (including DSEPS), may be claimed for pro-rated severe disabilities funding by the funded private school. Pro-rated funding for applicable students may be claimed from Alberta Learning using the March 1 enrolment count date. Funding will be provided at fifty percent of the rate for students with severe disabilities.

This would also apply to students who move from an institution (i.e., a hospital program, young offender centre, etc.) to a **funded 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 severe disabilities who were not identified by the original school authority but were identified as a student with a severe disability after transferring to a funded 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 private school after September 30, may also be claimed for pro-rated severe disabilities funding

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

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 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 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 private schools for home education students in grades 7 to 12 enrolled in the Alberta Learning Program of Studies through the Alberta Distance Learning Centre (ADLC) or through Distance Education 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 cost of Alberta Distance Learning (ADL) courses funded by Alberta Learning for a home education student in a school year will not exceed the home education funding rate. This funding may be claimed on form 04AL1.4a.
- 3. Additional funding may be provided to the supervising **funded 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 private school** to the home education **parents**. This funding may be claimed on form 04AL1.4b.
- 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 private school**. However, Alberta Learning 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 private school**. However, Alberta Learning 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 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 private school** to another after September 30, and the receiving supervising **funded private school** agrees to purchase ADL courses and related resources from the Learning Resources Centre, Alberta Learning 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 private schools**. This funding may be claimed on the applicable form, 04AL1.4a, for grades 7 to 12 and 04AL1.4b, for grades 1 to 6.
 - 8. **Home education students** and their **parents** must live in Alberta on September 30 of the current school year.
- New 9. Students enrolled in a home education program are not eligible for severe disabilities funding.

REQUIREMENTS

- 1. Parents are responsible for informing their supervising funded private school of their decision to provide a home education program for their children. Parents must fulfill this requirement by submitting all parts of the *Home Education Regulation* Notification Form No. 2 to the supervising funded private school. Form No. 2 is available from the supervising funded private school or from Alberta Learning's Home Education Information Package at: http://www.learning.gov.ab.ca/educationsystem/homeedinfo.pdf
- 2. The supervising **funded private school** must annually conduct at least two evaluations of their home education students' progress.
- 3. A supervising **funded 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 4; and
 - b) Report of ADLC courses for **home education students** on form 04AL1.4a.
 - c) Report of additional ADL course costs for grades 1 to 6 on form 04AL1.4b
- 5. Home education funding for a supervising **funded private school** is calculated by:
 - a) multiplying the number of **home education students** in grades 1 to 12 on the September 30 **count date** by the home education rate; and

- b) adding 50 percent of compulsory ADL course costs for students enrolled in grades 7 to 12, as paid for by the supervising **funded private school**, not exceeding the home education funding rate.
- c) adding the compulsory course costs for home ed students in grades 1 to 6 which exceed the 50 percent funding provided by the supervising **funded private school** to home education **parents**.
- 6. Funding for a supervising **funded 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:
 - a) Multiply the percentage of the student's school provided portion by the Base Instruction funding rate for supervising **funded private schools**, 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:

Total				<u>\$2779.60</u>
Plus the Regular school rate (for applicable grade)	60%	Х	\$2978	= <u>\$1786.80</u>
Plus ADL course costs to a maximum of 40 percent of home education rate	40%	X	\$1241	= \$496.40
Home education rate	40%	X	\$1241	= \$496.40

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:

Total				= <u>\$1762.10</u>
Regular School Rate (for applicable grade)	30%	X	\$2978	= <u>\$ 893.40</u>
Home education rate	70%	Χ	\$1241	= \$ 868.70

CONSIDERATIONS

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

REFERENCES

Home Education Policy 1.1.2

Home Education Regulation AR 126/99

SECTION 3.5 EARLY LITERACY FUNDING

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 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 private school's** early literacy program.

CONDITIONS

- 1. A **funded private school** may receive Early Literacy funding for programs provided for **funded students** in grades 1 and 2.
- 2. In order to access funding, a **funded private school** must indicate on the annual operational plan, submitted by May 31 of the previous **school** year, that it plans to provide Early Literacy programs for grades 1 and 2.
- 3. Funding will be based on the current **school** year enrolments in grades 1 and 2.
- 4. Funded 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

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

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

SECTION 4.1 FEDERAL FRANCOPHONE EDUCATION FUNDING

PURPOSE

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

CONDITIONS

- 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 – 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 student.
 - 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) <u>and</u> the hours of French instruction for the school year (including both semesters for grades 10-12) 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:

** 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 one 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
-------------------------------------------	---	-------------------------------------------	---	--------------------------------------------------------

Grades 10 to 12

Funding Rate	V	Instructional Hours per Year	X	Number of
Per FTE Funded Student	X	1000 Hours	X	Funded Students in the program

4. The following grant rates for 2004-2005 are provided as estimates for planning purposes only. Final grant rates will be confirmed once all enrolments for 2004-2005 are compiled.

PROGRAM	RATE
French First Language (Francophone) Education ECS- Gr.6	\$105 per FTE
French First Language (Francophone) Education Gr. 7-12	\$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 Learning to assist students in learning French. This funding is supplemental to the funding provided by Alberta Learning to all **school authorities**.

CONDITIONS

- 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 12 and funded children in ECS programs. The categories of instruction involving French which are funded are 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 <u>do not meet the minimum instructional hours</u> 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

Federal French Language funding is based on French program student enrolments as
of September 30 (reported to the Information Services Branch by October 5) <u>and</u> the
hours of instruction in French for the school year (including both semesters for grades
10-12) 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); or,
- 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.

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 French per year:

ECS to Grade 6 40 to 474 hours per student / year Grades 7 to 9 40 to 379 hours per student / year to 250 hours per student / year 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:

Grades ECS to 9

Funding Rate Per FTE Funded Student	X	Instructional Hours per Year 950 Hours	X	Number of Funded Students/ Funded Children in the program
-------------------------------------------	---	----------------------------------------	---	-----------------------------------------------------------

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
-------------------------------------------	---	-----------------------------------------	---	------------------------------------------------

5. The following grant rates for 2004-2005 are provided as estimates for planning purposes only. Final grant rates will be confirmed once all enrolments for 2004-2005 are compiled.

PROGRAM	RATE
Alternative French Language Program ECS – Gr. 6	\$105 per FTE
Alternative French Language Program Gr. 7-12	\$180 per FTE
FSL courses ECS – Gr. 6/other courses*	\$65 per FTE
FSL courses Gr. 7-12/other courses*	\$90 per FTE

^{*}This funding rate also applies for students and children taking courses in **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

<u>Policy, Regulations and Forms Manual</u> <u>French as a Second Language and French Immersion Policy 1.5.2</u>

SECTION 5.1
STUDENT HEALTH INITIATIVE

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

- 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 Learning administers SHI funding on behalf of the following provincial government partners Alberta Learning, 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.
- **Revised** 7. Alberta Learning 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 Revised approval. The Service Plan for the 2004-2005 school year with all required documents must be submitted by May 15, 2004.

- 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

The allocation of the SHI funding to the Partnership is based on a funding distribution formula: that estimates the number of students within the participating school authorities who require student health services by combining the numbers of students with disabilities with a portion of the general student population who may require student health services; and that addresses the 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 Learning total funded child/student enrolment data.

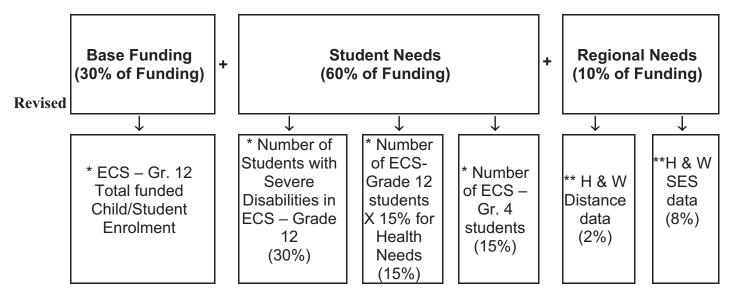
Student Need: 60% of the provincial funding provides additional funding to each Partnership based on:

- 30% toward each Partnership's proportion of the total provincial number of ECS to grade 12 students with severe disabilities. Alberta Learning maintains school jurisdiction profiles (Grades 1 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 Learning 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 Learning 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 Learning data as of September 30th; based on data for ages 2 ½ to 20 years of age.

Revised The total for the Partnership 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 will be 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

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

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 2004/2005 and the Student Health Partnership Annual Report Guidelines for 2004/2005(available at <www.gov.ab.ca/studenthealth>).

ALBERTA INITIATIVE FOR SCHOOL IMPROVEMENT FUNDING

PURPOSE

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

CONDITIONS

- Funding is provided for projects and project budgets that have been approved by Alberta Learning. Therefore the funding provided is the total of all the approved project budgets.
- Revised 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 12 and registered ECS children.

Alberta Learning will approve multi-year projects. Funding for future years will be based upon demonstrated evidence of success as collaboratively decided by Alberta Learning and the **school jurisdiction**. If funding is not continued for a project, the **school authority** may submit a new project proposal to Alberta Learning 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 Learning extranet.
- 2. **School authorities** have a high degree of autonomy and flexibility in designing school improvement projects and in allocating funding. The following conditions must be met for project approval:
 - a) The project plan must provide for sufficient professional development and administrative support;
 - b) Funding may not be used for payment of bonuses or other types of incentives; and
 - c) Funding may not be allocated on a per-student basis to **schools**.

- **Revised** 3. **School authorities** must provide Alberta Initiative for School Improvement (AISI) reporting information according to the following timelines:
 - October 15 AISI Project Annual Report (APAR); AISI Project Final Report (APFR) in the final year of the project
 - November 30 Annual Education Results Report includes a 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

- 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 (under revision)

<u>Alberta Initiative for School Improvement Administration Handbook,</u> <u>December 20, 1999</u> (under revision)

<u>Alberta Initiative for School Improvement Project Application Form and Database at www.learning.gov.ab.ca/sib/aisi</u>

PURPOSE

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

CONDITIONS

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

REQUIREMENTS

- 1. **School authorities** must sign a contract with a 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 04AL5.3) to Alberta Learning'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.
- 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

- 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 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 Learning will consider special circumstances for inclusion as an eligible site on a case-by-case basis in 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 "headend" location in larger public ECS-12 **school authorities** will create a significant bottleneck for network traffic.

As a result, Alberta Learning 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 \times (Jurisdiction student population / Average number of students per public jurisdiction provincially at June 30, 2004)$

2. MULTIPLE STAKEHOLDER SHARED FACILITY AGREEMENTS

When different learning 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.

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).

SECTION 5.4
CLASS SIZE INITIATIVE FUNDING

NEW

ALLOCATION FORMULA

- 1. This funding is provided to **school jurisdictions** to hire additional teachers in order to lower class size averages to those recommended by the Alberta Commission on Learning (ACOL), over a three (3) year period.
- 2. The funding allocations for the next three years (2004/2005 to 2006/2007) were calculated based on the higher of:
 - A jurisdictions 2003/2004 class size average; or
 - A combination of per student funding and the jurisdictions 2003/2004 class size average.

ALLOCATION CRITERIA

- 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** last year was used as the base for calculating the funding allocation.
- 2. The 2003/2004 **frozen funded student count** (ECS count at 0.5 FTE) was used for the per student portion of the calculation.
- 3. 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).
- 4. Funding in this manner ensures that all **school boards**, including those who have already met the ACOL guidelines, will receive funding.
- 5. Total teacher costs of \$65,800 were used to determine funding allocations.
- 6. In future years, (2005/2006 and 2006/2007), these allocations will receive applicable Business Plan increases.

PROCEDURES, DOCUMENTATION AND REPORTING

- 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 in classroom/student supports. Under no circumstances can this funding be used for increasing 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 average to the ACOL guidelines. It is expected that by 2006/2007, all jurisdictions will be at the ACOL guidelines.

Grades	Phased-I	Commission		
Grades	2004/2005	2005/2006	2006/2007	Guidelines *
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, but 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 provide by October 15, 2004, their three-year plan on how the ACOL guidelines will be met in their jurisdiction by 2006/2007. This information should be submitted to the School Finance Branch using form 04AL5.4 Jurisdiction Three-Year Class-Size Plan. Jurisdictions will be required to report annually through their Annual Education Results Report (AERR) on jurisdiction and **school** average class sizes by grade category (K-3, 4-6, 7-9, 10-12) and will be accountable for explaining whether or not the guidelines have been met.

SECTION 5.5

PURPOSE

This inter-ministerial funding is provided to Regional Integrated Case Management Teams to support the *Policy Framework for Services for Children and Youth with Complex Needs and Their Families (July 2003)*. Specifically:

CHILDREN AND YOUTH WITH COMPLEX NEEDS FUNDING

- supporting 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*.
- providing specialized services for children and youth with complex needs who require significant extraordinary care due to the severity of their impairment(s) so that they can attain their potential, participate fully in their education programs and be successful at learning.

CONDITIONS

- 1. Funding is provided if:
 - a) The child or youth:
 - is less than 20 years of age as of September 1, and
 - has one or more disabling condition 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.

SECTION 5.5 CHILDREN AND YOUTH WITH COMPLEX NEEDS FUNDING

- 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.
- 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.
- 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

SECTION 5.5 CHILDREN AND YOUTH WITH COMPLEX NEEDS FUNDING

Case Management Teams are required to identify in their Terms of Reference who they have designated as their "banker" school authority and any changes to this designation.

CONSIDERATIONS

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

a) Operational Funding

Each Regional Integrated Case Management Team receives a base amount 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

<u>Policy Framework for Services for Children and Youth with Complex Needs and Their</u> 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)

SCHOOL JURISDICTIONS AND
FUNDED PRIVATE SCHOOLS
SECTION 6.1
INSTITUTIONAL PROGRAMS FUNDING

PURPOSE

Revised 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 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 Learning. 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 Welfare Act*, or
 - c) are in long term medical care with a Regional Health Authority, or
 - d) are a temporary resident of a women's shelter and require protection from physical, psychological or sexual abuse (for funding purposes under this section, these students are considered **resident students of the government**).

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

- School jurisdictions and funded private schools must have approval from the Minister and a contract/agreement with Alberta Learning 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 Learning.
- 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 Learning will not provide funding to cover the education program costs for non-eligible students attending institutional programs as outlined above (i.e., 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 programs/facilities are eligible for funding under this category.
- 6. Institutional programs will only be funded for a 10-month/regular school year program.

 Updated Only Young Offender Centre's will be funded for a 12-month program.

REQUIREMENTS

INSTITUTIONAL PROGRAMS

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

- 1. Ensure all eligible institutional students are registered with the grant program code 550,
- 2. Submit a budget of reasonable and eligible costs using form 04AL6.1a to the Special Programs Branch by April 30 for the following school year. See Requirement #10 for further instructions.
- 3. Submit a letter for approval to the Special Programs Branch explaining the need for additional funds when requesting a significant change to an approved budget.
- 4 Submit a statement of actual program costs and revenues using form 04AL6.1a to School Finance Branch by October 15 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 the approved budget amount for that category.
- 5. Keep a daily attendance record for all students.

- 6. Submit annually an Institutional School Profile Report form for the previous school year to the Special Programs Branch by October 15.
- 7. Ensure that the program provided in the **institution** is of comparable quality to other **school** programs provided by the **school jurisdiction** or **funded private school**. The **institution's** educational program shall be considered an integral part of the **school jurisdiction** or **funded private school** and subject to the same level of planning, evaluating and reporting required by provincial and local policy.
- 8. Submit a written proposal for approval of new institutional programs. The proposal should provide a description of the program and a budget that outlines the financial needs to support delivery of the program. The proposal should be sent to the Director of the Special Programs Branch by May 1 of the school year preceding the school year for which approval is being requested.
- 9. Maintain the confidentiality of students in Women's Shelter programs by withholding the students' names and Alberta Student Numbers when submitting final costs for the programs. However, **school jurisdictions** and **funded private schools** should claim Base Instruction funding for these students and report this revenue on budget and final cost forms.

10. Instructions for Completion of 2004-2005 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** (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 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** (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.

Instructional Salary Costs

- a) Certificated Salaries & Benefits: teacher/school administration salaries and benefits.
- b) Uncertificated 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 Learning.

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 (i.e. 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 (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 2004-2005 Budgets, please use monthly enrolments from the 2003-2004 school year. For 2004-2005 Finals, please use monthly enrolments for the 2004-2005 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. FOR SCHOOL

SECTION 6.2

AUTHORITIES REGIONAL EDUCATIONAL CONSULTING SERVICES FUNDING

PURPOSE

This funding is for designated **school jurisdictions** to provide **school authorities** with access to subsidized educational consulting services for children and students with severe learning needs.

CONDITIONS

Revised 1. The mandate has been expanded for this funding category to provide services to more students with special needs. 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 Learning 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

RECS are not available for Early Childhood Services (ECS) children with a Severe Delay Involving Language (code 47) unless there is evidence that the child has severe special needs that are not reflected by the current code.

- 2. Francophone school authorities may access "Le Reseau provincial d'adaptation scolaire" for **funded students** meeting the criteria for any special needs code/category.
- New 3. Alberta Learning will determine the funding allocation for each program based on provincial and regional needs.

REQUIREMENTS

 The school jurisdictions designated by Alberta Learning to provide regional consulting services will use RECS funding 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 2004-2005 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 Learning for the next school year.
- 4. The **school jurisdictions** designated to provide regional educational consulting services will submit a budget to School Finance Branch with a copy 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 Learning will not fund any deficits.
 - 5. The designated **school jurisdictions** will provide, to the School Finance Branch, an audited financial statement in respect of 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. The **school jurisdictions** designated by Alberta Learning to provide regional assessment services are:
 - a) Grande Prairie Public 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 Reseau provincial d'adaptation scolaire
- 2. For referral information in the following zones, contact:

ZONE 1 C.A.S.E.

(Coordinated Assessment Services for the Exceptional)

Crystal Park School 9315 – 116 Avenue Grande Prairie, Alberta

T8V 6L5

Phone: (780) 539-0333 Fax: (780) 539-7613

E-mail: cpark@gppsd.ab.ca

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

Edmonton Public Schools

13359 – 62 Street Edmonton, Alberta

T5A 0V5

Phone: (780) 478-4088 Fax: (780) 476-2022

E-mail: Judy. Miller@epsb.ca

ZONE 4, 5 and 6 REACH Services

(Regional Educational Assessment and Consultation Services)

Emily Follensbee School 5139 – 14 Street SW Calgary, Alberta

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

Revised 3. Administration funding is included in the allocation.

2004-2005 FUNDING MANUAL FOR SCHOOL AUTHORITIES SCHOOL JURISDICTIONS AND
ACCREDITED PRIVATE SCHOOLS
SECTION 6.3
LEARNING RESOURCES CREDIT

ALLOCATION FORMULA

Learning Resources = Number of registered x per student students in grades 1 –12 credit rate (less than 20 years of age)

ALLOCATION CRITERIA

- A learning resources credit at the Learning Resources Centre (LRC) is provided to school jurisdictions, accredited private schools and band operated and Federal Government administered First Nations schools to assist in purchasing learning resources from the LRC.
- Revised 2. The learning resources credit is used by **school jurisdictions** and accredited private schools to help pay for learning resources purchased from the LRC. The learning resources credit would cover 25 percent of an order while the **school jurisdiction** or accredited private school pays for 75 percent.
 - 3. The LRC will charge the regular selling price after the credit amount is fully utilized.
 - 4. Unless requested otherwise by the school jurisdiction or accredited private school, the learning resources credit 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" on the purchase order.

PROCEDURES, DOCUMENTATION AND REPORTING

1. A school jurisdiction or accredited private school is not required to apply for the learning resources credit; Alberta Learning will determine the credit using enrolment information in grades 1 to 12 (who are under the age of 20) on September 30. To receive the credit, students must be registered by the school jurisdiction or the accredited private school with the Information Services Branch.

ADDITONAL INFORMATION

- Revised 1. The 2004/2005 Leaning Resources Credit is valid for April 1, 2004 to March 31, 2005.
 - 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.

SECTION 6.4 REGIONAL CONSORTIUM FUNDING

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 learning.

CONDITIONS

- 1. The consortium and its agent **board** will operate under the provisions of the "Guidelines for Establishing Regional Consortia".
- 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 Learning 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

- If the annual infrastructure expenses are less than the funding provided by Alberta Learning, 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.
- Revised4. The agent **board** will provide the consortium with a Statement of Revenues and Expenses and a Statement of Financial Position and the Certification (form 04AL6.4). The consortium shall forward these statements, and an annual report that provides program details and results achieved, to the School Finance Branch by December 1 of each year.
- Revised 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 Learning will provide infrastructure funding to a consortium through its agent as follows:

70 percent - September

30 percent - April

Updated 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.
- CONSORTIA NAMES

AGENT BOARD

Updated/ New

Southern Alberta Professional Development	Lethbridge School District #51
Consortium	
Calgary Regional Consortium	Rocky View School Division #41
Central Alberta Regional Consortium	Red Deer School District #104
Edmonton Regional Consortium	Parkland School Division #70
East Central Regional Consortium	Lakeland RCSS District #150
Northwest Regional Learning Consortium	Grande Prairie School District #2357

REFERENCES

<u>Guidelines for Establishing Regional Consortia: An Initiative for the improvement of Education and Its Delivery, Alberta Learning, October 1995.</u>

SECTION 6.5
DEBT RETIREMENT

PURPOSE

This funding repays the annual supported debt, principal and interest, that **school jurisdictions** owe on **school** facilities.

CONDITIONS

- 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 Learning does <u>not</u> provide debt retirement funding to a public or separate **school jurisdiction** for:
 - Any current capital costs or debt owing on administration buildings, garages, warehouses, busses, and teacherages unless that space has been authorized by Alberta Learning for instructional use;
 - 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, Learning 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

CONDITIONS (CONTD.)

b) is in excess of debenture interest calculated at the following rates:

%	Debenture Issue Date
Rate	
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

- The annual debenture debt, principal and interest, payments for school buildings are paid directly by the Ministry of 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 04AL6.5. These payments will be made directly to school jurisdictions.
- 3. Interest-shielding on unsupported debentures will be paid directly to the **school jurisdiction**.

2004	1-2005 School Year
\$2,482	per funded child
\$4,963	per funded student
\$141.80	per CEU
\$52,020	per program
\$4,963	per eligible funded student
\$141.80	per CEU
\$236.33	per CEU
\$1,241	per eligible funded student
\$1,241	per eligible funded student
\$1,637	Per eligible funded child/ student
\$2,154	Per eligible funded child
\$21,707	Per highest funded child in a unit
\$5,385	for each additional funded child in a unit
\$14,415	Per funded student based on jurisdiction profile
	\$2,482 \$4,963 \$141.80 \$52,020 \$4,963 \$141.80 \$236.33 \$1,241 \$1,241 \$1,241 \$2,154 \$2,154

School Juri Differential	sdictions Cost Fundin	g		2004-	2005 School Year
Weighting	a Second La factor of 0.6235 and Foreign bor		\$1,020	per eligible FTE funded child/student	
	s, Métis and factor of 0.6235	Inuit Education	\$1020	per eligible FNMI student/ECS child	
	omic Status factor of 0.2495			\$408	per eligible FTE funded child/student
	ols by Neces	ssity:			
	th ≤150 FTE Stu th >150 but <22			\$76,500	per eligible school sliding scale reducing to zero
School <u>Type</u>	Peak <u>Enrolment</u>	Enrolment <u>Limit</u>			
K –3	40	80		\$510	per FTE funded enrolment
K – 6	80	150		\$1,428	per FTE funded enrolment
K – 9	80	220		\$1,632	per FTE funded enrolment
K – 12	80	290		\$2,550	per FTE funded enrolment
Intra-Jurisd	iction Distar	ice		\$1.02	per kilometer of eligible distance
Enrolment (Growth:				
Year-to-ye Jurisdictior Growth rate School gro	n growth e >4% wth			\$552 \$552	per FTE funded child/student per FTE funded child/student
Growth rate					
Year-to-ye					
Jurisdiction Decline rat	n decline			\$3,723	per FTE funded child/student
School ded Decline rat				\$552	per FTE funded child/student

	School Jurisdictions Differential Cost Funding	2004	I-2005 School Year
	Small Board Administration Charter School	\$56,100 \$408,000	per charter school per school jurisdiction
	School jurisdiction enrolment <2000 School jurisdiction enrolment >2000 but <3000	\$408,000	sliding scale reducing to zero
	Northern Allowance		
	Lower Zone	\$408	per FTE funded enrolment
	Intermediate Zone	\$612	per FTE funded enrolment
	Upper Zone	\$918	per FTE funded enrolment
	Relative Cost of Purchasing Goods and Services		Applies to:
	Adjustment (RCPA)		 20% of total eligible funding (Except Provincial Priority, Transportation and Boarding)
			 47% of Transportation and Boarding – ECS to Grade 12
	Francisation Weighting factor of 0.6235 Canadian/Foreign-born students	\$1,020	per eligible FTE funded child/student
	Stabilization		Top-up funding to a school jurisdiction - no less funding under the renewed Funding Framework than under the previous Funding Framework.
Updated	d Enhanced ESL/Francisation and Support Services for Immigrant Students Weighting factor of 0.2182 ESL/Francisation Foreign-born	\$357	per eligible FTE funded child/student
	Provincial Priority Targeted Funding		
	Student Health Initiative		per formula
	Alberta Initiative for School Improvement (AISI)	\$123	maximum per registered student
	High Speed Networking	\$503.50	maximum per month per approved site
Updated New	Class Size Initiative Funding		per formula

School Jurisdictions Other Provincial Support Fund	2004-2005 School Year			
Institutional Programs		net cost of program for eligible funded students		
Regional Educational Consulti	ing Services			as per approved allocation
Learning Resources Credit			\$10.67	credit per registered student
Regional Consortium			\$166,368	per consortium
Transportation Funding				
Boarding			\$3,461	per eligible funded student
Urban Transportation	10,000 – 19,99	99 population	\$520	per eligible passenger
	20,000 – 29,99	9 population	\$483	per eligible passenger
	30,000+	population	\$445	per eligible passenger
Special			\$2,365	per funded student with disabilities
Weekend			\$3,851	per funded student with disabilities
Metro Urban Transportation B	lock		\$445	per expected eligible passenger
Special			\$2,365	per student with severe disabilities, based on profile

ansportation Fundin	g							2004-	2005 School	Year	
ral Transportation								Fo	mula Based		
Special							9		r funded studen t sabilities	with	
Weekend									funded student abilities	nt with	
Interschool Transportation	n Rates							\$0.69 pe	kilometre for two tance between so		
Distance	2.4 – 5.9	6.	0 – 9.9	10.0 – 1	3.9	14.0 – 17.9	18.0 – 25.9	26.0 -	- 37.9	38+	
Distance	2.4 0.0	<u> </u>									
Rate	\$8.59	\$	12.58	\$15.03	3	\$17.29	\$20.81	\$21	.97	\$23.10	
	\$8.59 Insportatior <u>029</u>	\$ n Service A .3035	12.58 rea <u>.3657</u>	<u>.5876</u>	<u>.7795</u>	<u>.96 – 1.14</u>	<u>1.15 – 1.30</u>	<u>1.31 – 1.5</u>	<u> 1.60 – 3.01</u>	3.02·	
Pate Density of Effective Tra No. Eligible Students 0 - 700	\$8.59 insportation <u>029</u> \$525	\$ service A 3035 \$601	rea .3657 \$638	<u>.5876</u> \$643	<u>.7795</u> \$648	<u>.96 – 1.14</u> \$669	<u>1.15 – 1.30</u> \$750	<u>1.31 – 1.5</u> \$893	9 <u>1.60 – 3.01</u> \$1,207	3.02- \$1,40	
Rate Density of Effective Tra No. Eligible Students 0 - 700 701 - 1400	\$8.59 insportation <u>029</u> \$525 \$525	\$ Service A .3035 \$601 \$582	rea .3657 \$638 \$628	<u>.5876</u> \$643 \$640	<u>.7795</u> \$648 \$643	<u>.96 – 1.14</u> \$669 \$664	1.15 – 1.30 \$750 \$748	<u>1.31 – 1.5</u> \$893 \$877	9 <u>1.60 – 3.01</u> \$1,207 \$1,061	3.02- \$1,40 \$1,40	
Rate Density of Effective Tra No. Eligible Students 0 - 700 701 - 1400 1401 - 2100	\$8.59 Insportation 029 \$525 \$525 \$525	\$ Service A .3035 \$601 \$582 \$574	rea .3657 \$638 \$628 \$612	<u>.5876</u> \$643 \$640 \$638	<u>.7795</u> \$648 \$643 \$640	<u>.96 – 1.14</u> \$669 \$664 \$660	1.15 – 1.30 \$750 \$748 \$746	<u>1.31 – 1.5</u> \$893 \$877 \$867	9 <u>1.60 – 3.01</u> \$1,207 \$1,061 \$1,059	3.02- \$1,40 \$1,40 \$1,40	
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Rate Density of Effective Tra No. Eligible Students 0 - 700 701 - 1400 1401 - 2100 2101 - 2800 2801 - 3500	\$8.59 Insportation 029 \$525 \$525 \$525 \$525 \$525	\$ Service A 3035 \$601 \$582 \$574 \$545 \$542	rea .3657 \$638 \$628 \$612 \$574	.5876 \$643 \$640 \$638 \$636 \$628	.7795 \$648 \$643 \$640 \$638 \$636	.96 - 1.14 \$669 \$664 \$660 \$658 \$643	1.15 – 1.30 \$750 \$748 \$746 \$745 \$695	<u>1.31 – 1.5</u> \$893 \$877 \$867	9 <u>1.60 – 3.01</u> \$1,207 \$1,061 \$1,059	3.02- \$1,40 \$1,40 \$1,40	
Density of Effective Tra No. Eligible Students 0 - 700 701 - 1400 1401 - 2100 2101 - 2800 2801 - 3500 3501 - 4200	\$8.59 Insportation 029 \$525 \$525 \$525 \$525 \$525 \$525	\$ Service A 3035 \$601 \$582 \$574 \$545 \$545 \$542 \$536	rea .3657 \$638 \$628 \$612 \$574 \$574 \$545	.5876 \$643 \$640 \$638 \$636 \$628 \$626	.7795 \$648 \$643 \$640 \$638 \$636 \$628	.96 – 1.14 \$669 \$664 \$660 \$658 \$643	1.15 – 1.30 \$750 \$748 \$746 \$745 \$695 \$689	<u>1.31 – 1.5</u> \$893 \$877 \$867	9 <u>1.60 – 3.01</u> \$1,207 \$1,061 \$1,059	3.02- \$1,40 \$1,40 \$1,40	
Rate Density of Effective Tra No. Eligible Students 0 - 700 701 - 1400 1401 - 2100 2101 - 2800 2801 - 3500	\$8.59 Insportation 029 \$525 \$525 \$525 \$525 \$525 \$525 \$525 \$525	\$ Service And 1.3035 \$601 \$582 \$574 \$545 \$542 \$536 \$525	rea .3657 \$638 \$628 \$612 \$574 \$574 \$545 \$536	.5876 \$643 \$640 \$638 \$636 \$628 \$626 \$561	.7795 \$648 \$643 \$640 \$638 \$636 \$628 \$626	.96 - 1.14 \$669 \$664 \$660 \$658 \$643 \$643 \$638	1.15 – 1.30 \$750 \$748 \$746 \$745 \$695 \$689 \$689	<u>1.31 – 1.5</u> \$893 \$877 \$867	9 <u>1.60 – 3.01</u> \$1,207 \$1,061 \$1,059	3.02- \$1,40 \$1,40 \$1,40	
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2004-2005 FUNDING MANUAL FOR SCHOOL AUTHORITIES

EARLY CHILDHOOD SERVICES (ECS) FUNDING RATES

ECS Funding for Private ECS Operators and Private Schools	2003-20	004 school year		2004-200	5 school year
ECS Base Instruction Funding	\$2,227	per child		\$2,272	per funded child
Portable Classrooms for ECS Operators	***	The COT		****	The COT
Rental charge per month	\$100	plus GST		\$100	plus GST
Mild or Moderate disabilities and Gifted and Talented:	\$2,111	per eligible funded child	Updated	\$2,154	, per eligible funded child
Program Unit Funding (PUF) for children with severe disabilities					
Maximum per child with the highest combination of program hours and home visits in a unit.	\$21,281	per 1st child in a unit		\$21,707	per highest funded child in a unit
Maximum per child for each additional child in a unit for units with more than one child	\$5,279	for each additional child in a unit		\$5,385	for each additional funded child in a unit
Transportation - Regular	\$436	per eligible transported ECS child		\$445	per eligible transported ECS child
Transportation - Special needs	\$11.74	per round trip		\$11.97	per round trip
Plant Operation and Maintenance (only for Private ECS operators and Private Schools)	\$232	per child		\$237	per funded child
Plus sq. m. rate based on 40 sq. m for 25 children	\$465	for every 25 children or portion thereof.		\$474	for every 25 funded children or portion thereof.

EARLY CHILDHOOD SERVICES (ECS) FUNDING RATES

ECS Funding for Private ECS Operators				
and Private Schools	2003-20	004 school year	2004-200	5 school year
Teacher Salary Enhancement Funding	6%	of total certificated salaries and benefits as reported on 2000-2001 AFS	6%	of total certificated salaries and benefits as reported on 2000-2001 AFS
Program Enhancement Project		per approved project		per approved project
Early Literacy				
Minimum of \$1,200 for each ECS operator	\$40.39	per child based on September 30 count	\$41.20	per eligible funded child - September 30 count
ECS Administration	Percentage (bas	ed on enrolments) of total ECS funding	Percentage (based or	enrolments) of total ECS funding
	*6 percent if few	er than 2000 FTE children	*6 percent if fewer that	an 2000 FTE children
	*4 percent if few	er than 6000 FTE children	*4 percent if fewer that	an 6000 FTE children
	*between 4 and 6	6 percent on a sliding scale if between	*between 4 and 6 per	cent on a sliding scale if
	2000 to 6000 F	TE c hildren	2000 to 6000 FTE ch	ildren
Alberta Initiative for School Improvement (AISI) - maximum per registered child	\$60	maximum per registered child	\$62	maximum per registered child
High Speed Networking Funding	\$251.75	Maximum per month per approved site	\$251.75	Maximum per month per approved site

PRIVATE SCHOOLS FUNDING RATES

Private Schools Funding	2003-2	2004 school year	2004-	-2005 school year
Base Instruction Funding				
Grades 1 - 9	\$2,672	per funded student	\$2,978	per funded student
Grades 10 (full time program - 31 or more credits)	\$3,058	per funded student		Rolled into CEU Funding
Grades 10 (partial program - less than 31 credits)	\$1,529	per funded student		Rolled into CEU Funding
Grades 10 (summer courses)	\$76.34	per CEU		Rolled into CEU Funding
Grades 10 - 12 (funding maximum of 60 CEUs per student per school year)	\$76.34	per CEU	\$85.09	per CEU
Amount of funding per funded student included in Base Instruction to support programs for funded students with Mild or Moderate disabilities	\$225	per funded student or		Included in Base funding
and funded students who are Gifted and Talented.	\$6.43	per CEU		Included in CEU funding
Designated Special Ed. Private Schools (DSEPS) Up	dated			
Instruction Funding rate for students with mild or moderate disabilities whose parents consulted with their resident school board prior to placement in the DSEPS (ie. coded as 110).	\$8,718	per eiligible funded student	\$9,125	per eligible funded student
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 (ie. do not code as 110).	\$5,343	*per eligible funded student	\$5,683	*per eligible funded student
*This rate also represents the Base Instruction rate for students with severe disabilities in DSEPS.				

PRIVATE SCHOOLS FUNDING RATES

Private Schools Funding	2003-2004 school year	2004-2005 school year
Integrated Occupational (IO):		
Grade 10 (full-time IO)	\$3,672 per eligible funded student	Rolled into CEU Funding
Grade 10 (partial IO)	\$1,836 per eligible funded student	Rolled into CEU Funding
Grades 10 to 12	\$127.27 per CEU	\$141.82 per CEU
Severe Disabilities Funding		
 a) Severe Cognitive, Multiple, Physical/Medical disability, Deafness, or Blindness 	\$13,382 per eligible funded student	\$14,415 per eligible funded student
b) Severe Emotional/Behavioral Disability Updated	\$13,382 per eligible funded student	\$14,415 per eligible funded student
Home Education	\$1,143	\$1,241 per eligible funded student
Plus 50% of the cost of ADLC courses for grades 7 to 12 to a maximum of:	\$1,143 per eligible funded student	\$1,241 per eligible funded student
Plus additional funding for Grades 1 to 6 ADLC courses. See section 3.4.		
Early Literacy	\$135 per funded student based on September 30 count for grades 1 and 2	\$138 per funded student based\$138 on September 30 count for grades 1 and 2
Learning Resources Credit - Provided on a Provincial Government fiscal year (Apr 1 to Mar 31)	\$10.46 credit per registered student	\$10.67 credit per registered student

PRIVATE SCHOOLS FUNDING RATES

Private Schools Funding	2003-2	2004 school year	2004-	2005 school year
Resident Students of the Government		net cost of program for eligible funded students		net cost of program for eligible funded students
Institutional Programs		net cost of program forr eligible funded students		net cost of program forr eligible funded students
Alberta Initiative for School Improvement (AISI)	\$72	maximum per registered student	\$74	maximum per registered student
Teacher Salary Enhancement Funding		same as 2002-2003 allocation		Rolled into Base funding for private schools
High Speed Networking Funding	\$302.10	maximum per month per approved site	\$302.10	maximum per month per approved site
One-Time Grants for 2003-2004:				
Resources for the Classroom-\$20 million	\$38.40	per funded student		Expired

SECTION 7.4
PAYMENT SCHEDULE

PART 1 – School Jurisdiction Funding

Sections 1.1 to 1.26, 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 Learning 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.

General Revenue Fund (GRF)

Updated/ Revised

The general revenue portion of funding will be distributed on a monthly basis at 8.33 percent per month, with the exception of January and August, which will be at 8.35 percent. March will have a 5% payment on March 15 and may be adjusted up to an additional 7% by March 31, (minimum payment of 3.3%) with the prior approval of the Assistant Deputy Minister, Corporate Services.

Payment Dates

Sept. 15, 2004	Dec. 15, 2004	Mar. 15, 2005	Jun. 15, 2005
Oct. 15, 2004	Jan. 17, 2005	Apr. 15, 2005	Jul. 15, 2005
Nov. 15, 2004	Feb. 15, 2005	May 16, 2005	Aug. 15, 2005

Advances will be calculated using the most recent information on **funded 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 percent

PART 5 – Provincial Priority Targeted Funding

Section 5.1 Student Health Initiative

On approval of joint plan - 58.33 percent advance

March/April - 100 percent less previous payment

Section 5.3 High Speed Networking Funding

September or upon approval of application - Prorated basis to Mar. 31
April or upon approval of application - Prorated basis to Aug. 31

PART 6 – Other Provincial Support

Section 6.4 Regional Consortium Funding

Updated

September -70 percent

*April -100 percent 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.

SECTION 7.5 PAYMENT SCHEDULE

PART 2 - Early Childhood Services (ECS) Funding

The funding provided by Alberta Learning to Private ECS operators is released at set times provided all conditions have been met. The payment months are provided in this schedule to allow private ECS operators the opportunity to plan their cash flow to meet ongoing expenditures.

Sections 2.1, 2.2, 2.6 to 2.10, 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 percent advance*

January - 58.33 percent less previous payment** April - 100 percent less previous payments

Note: With the approval of the Assistant Deputy Minister, Corporate Services, a March payment may be made up to 90 percent less previous payments.

Section 2.3 Program Unit Funding (PUF)

September - Designated Sp. Ed. ECS programs

- 40 percent advance based on the previous year approved PUF budget amount.

Upon approval of written request to School - up to 40 percent advance based on the Finance - regular ECS programs

previous year approved PUF budget amount or current year estimated budget.

Upon receipt of PUF application April

Upon approval of final costs

- 58.33 percent less any previous payment

- 90 percent less previous payments - 100 percent less previous payments

Note: With the approval of the Assistant Deputy Minister, Corporate Services, a March payment may be made up to 90 percent 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 enrolment.

^{**}All ECS programs with mild/moderate children will receive Mild or Moderate funding based on their current year September 30 enrolment count.

Section 2.4 and 2.5 Transportation

Payment is based on receipt and review of a transportation application:

January - 58.33 percent advance

April - 100 percent less previous payment

PART 4 - Federal French Funding

Section 4.2 Federal French Language

On approval of allocations - 100 percent

PART 5 – Provincial Priority Targeted Funding

Section 5.3 High Speed Networking Funding

September or upon approval of application - Prorated basis to Mar. 31

April or upon approval of application - Prorated basis to Aug 31

PART 3 – Private Schools Funding

The funding provided by Alberta Learning to **funded private schools** is released at set times provided all conditions and requirements have been met. The payment months are provided in this schedule to allow **funded private schools** the opportunity to plan their cash flow to meet ongoing expenditures.

Sections 3.1 (grades 1-9), 3.2 to 3.5 and 5.2.

Advance payments will be made based on 2003/2004 enrolments and course information, and 2004/2005 rates.

All payments in January or later will be based on 2004/2005 enrolments.

September - 40 percent advance based on last year's

enrolment

January - 58.33 percent less previous payment

April - 100 percent less previous payments

Note: With the approval of the Assistant Deputy Minister, Corporate Services, a March payment may be made up to 90 percent less previous payments.

Section 3.1 Base Instruction (Grades 10 to 12)

Revised

Revised

September - 40 percent advance based on last year CEUs

March - 58.33 percent less previous payment - 100 percent less previous payments

Note: With the approval of the Assistant Deputy Minister, Corporate Services, a March payment may be made up to 90 percent less previous payments.

PART 4 – Federal French Funding

Section 4.2 Federal French Language

On approval of allocations - 100 percent

PART 5 – Provincial Priority Targeted Funding

Section 5.1 Student Health Initiative (SHI)

On approval of joint plan - 58.33 percent advance

March/April - 100 percent less previous payments

Section 5.4 High Speed Networking Funding

September or upon approval of application April or upon approval of application Prorated basis to Mar. 31Prorated basis to Aug 31

PART 6 – Other Provincial Support

Section 6.1 Institutional Programs and Resident Students of Government

September

- 58.33 percent advance based on approved budget claim form

•

April

- 90 percent less previous payments

On approval of Final Costs claim form

- 100 percent of actual costs less previous payments

SECTION 7.7
ENROLMENT COUNTS AND CONFLICTS

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 that **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 percent of the Base Instruction rate applicable to each **school authority**.
- 9. Course Conflicts (Grades 10 12)

Revised 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 submission. On this form, the **school** must indicate the number of actual instructional minutes delivered to the student. These minutes should be based on 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.

FORMS SECTION SUMMARY OF FUNDING APPLICATION FORMS

	FORM NO.	FUNDING APPLICATION FORM	DUE DATE	RETURN TO
	04ALDSA	Delegation of Signing Authority for funding applications	October 29, 2004	SF
	04AL1.2a	Junior High Courses taken by Senior High Students (School Jurisdictions and Private Schools)	Upon Completion of Term/Course	SF
	04AL1.2b	Report on Funded Students Attending First Nations Schools	April 29, 2005	SF
	04AL1.2c	Add, Modify, Delete form for Enrolments	*April 29, 2005	SF
Updated	d 04AL1.2d Declaration of Management for 2003-2004		February 4, 2005	SF
Updated	04AL1.3	Application to Operate a New Outreach Program for 2005-2006	March 31, 2005	ZS
	04AL1.4a	Report of Jr. and Sr. High Home Education Students	December 15, 2004 June 30, 2005	SF
	04AL1.4b	Report of Additional ADLC Course Costs for Grades 1 to 6	**	SF
	Electronic	Application Form Rural Transportation	November 30, 2004	SF
		Application Form Special Transportation and Boarding	November 30, 2004	SF
	Submission	Application Form Urban Transportation	November 30, 2004	SF
	04AL2.3a	Program Unit Funding Application	January 4, 2005	SF
	04AL2.3b	ECS PUF Statement of Actual Expenditure	October 30, 2005	SF
Updated	04AL2.3c	PUF Application Adjustment Form	As per form	SF
Updated	04AL2.4	ECS Transportation	November 30, 2004	SF
	04AL5.3	High Speed Networking Funding Application	***Upon Connection	STB
	04AL5.4	Jurisdiction Three-Year Class Size Plan	October 15, 2004	SF
	04AL6.1a	Institutional Program – Budget – Final	April 30, 2004 October 14, 2005	SP SF
	0441.0.41	Resident Students of the Government – Budget	October 15, 2004	SF
	04AL6.1b	– Final	August 31, 2005	SF
	04AL6.4	Regional Consortium Statement of Revenue and Expenses Regional Consortium Statement of Financial Position Certification	December 1, 2005	SF
	04AL6.5	Capital Loans Form	October 25, 2004	SF

^{*}Or after receiving your First RACERS data.

IMPORTANT DEADLINES - 2004/2005 SCHOOL YEAR

New New Resolution of Priority School Conflicts April 29, 2005

Enrolment Turnaround Reports to School Finance May 31, 2005

Course and marks submission or modification to IS

First Semester June 30, 2005
First and Second Quarter June 30, 2005
Remaining Terms of the School Year November 15, 2005

Course and Module Conflicts and Students Not Enrolled September 30.

First Semester July 29, 2005
First and Second Quarter July 29, 2005

Remaining Terms of the School Year December 22, 2005

LEGEND: SF = School Finance SP = Special Programs

IS = Information Services STB= Stakeholder Technology Branch

ZS= Zone Services

^{**}After a full course load has been purchased for the home ed student.

^{***} Or before August 31, 2005

DELEGATION OF SIGNING AUTHORITY FORM

This form is provided to allow for 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 Learning funding applications on behalf of the Secretary-Treasurer/Superintendant.

NAME (S)	(Please Print)	SIGNATURES
	bove listed individual(s funding application for	s) are approved by the board to sign ms:
Secretary	- Treasurer	Date

04ALDSA

Submit to the School Finance Branch by October 29.



SCHOOL JURISDICTIONS AND PRIVATE SCHOOLS

JUNIOR HIGH COURSES (TAKEN BY SENIOR HIGH STUDENTS)

For the School Year: September 1, 2004 to August 31, 2005 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 Alberta Student Name of Student (Alphabetical) Credit **D-delete** Number (ASN) Surname / Given Name(s) **Course Name** Value **CERTIFICATION** I certify the information reported on this form is correct.

(Signature of: Teacher/Principal)

(Date)

04AL1.2a RETURN TO: SCHOOL FINANCE

(Signature of: Secretary-Treasurer/Superintendent)



REPORT ON FUNDED STUDENTS ATTENDING FIRST NATIONS SCHOOLS

For the School Year: September 1, 2004 to August 31, 2005

Name of School Authority:

Authority Code: _____

Alberta Student Number (ASN)	Name of Student	Bi	Birthdate YY MM DD		Grade	First Nations School
		YY				
	CER	RTIF	[CA]	ΓΙΟΝ	I	
	I certify that the inform	natio	n rep	orte	d on this f	orm is correct.
Signature of Seci	retary Treasurer/Superintenden					Date
•	,					



BASE INSTRUCTION ADD, MODIFY, DELETE FORM FOR ENROLMENTS

School Year: 2004/2005 Count Date:			September 30, 2004	
Authority Code:		Authority Name:		_
School Code:		_		
Action: Student No.: Last Name: AKA Last Name: Birth Date: Address Line 1: Address Line 2: City: Postal Code:	Registration: Local Board ID: First Name: AKA First Name: Gender: Province: Phone:	Grade: Citizenship: Sec. 23 Eligibility: Reg Entry Status: Exit Description: Special Needs: 1 Enrolment Type: 1 Grant Codes: 1	Enrolment Date: Expiry Date: French Hours: Resident Juris: Exit Date: 2 2 2 3 2 3	
See Reverse for Legend Comments: Please Note: The student m		CERTIFICATION formation reported on this form is correct.	Blended Home Percentage of Program at School	l
(Signature of: Secretary-Treasu	urer/Superintendent) ((Signature of: Teacher/Principal)	(Date)	

Legend

Action: (A) Add, (M) Modify, (D) Delete

Student Number: Alberta Learning assigned (ASN) (9 digits)

Last/First Name: Student Name

Local Board ID: The number assigned by the school or school authority for internal tracking (if applicable)

Gender: (M) Male, (F) Female

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

Enrolment Type: Refer to Enrolment Type Table in Student Information System User's Guide Refer to Grants Program 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)

(30) ECS Mildly or Moderately Disabled
(31) Severe Cognitive Disability
(42) Severe Emotional/Behavioural Disability
(51) Mild Cognitive Disability

(43) Severe Multiple Disability
 (52) Moderate Cognitive Disability
 (44) Severe Physical or Medical Disability
 (53) Emotional/Behavioural Disability
 (45) Deafness
 (54) Learning Disability (All LD Students)

(46) Blindness (55) Hearing Disability. Hard of hearing

(47) Severe Delay Involving Language (ECS children only) (56) Visual Disability. Low vision Other (57) Communication Disability

(10) Developmentally Immature (ECS only, do not use 500 code) (58) Physical or Medical Disability

(80) Gifted/Talented (ECS – Grade 12) (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 2003 – 2004 School Year

School Authority Name: _	
School Authority Code: _	
-	

"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 the *Funding Manual for School Authorities* provided by Alberta Learning. As the political, educational and financial leaders, 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 fully 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:
School Authority:
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.

Describe the unique needs of the student population that the program plans to

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 Centre (ADLC) 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?

04AL1.3 Page 2 of 4

- 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 Learning 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 prior to final approval, the liaison manager for the applying jurisdiction will conduct an on-site visit to view the facility.

For further information about establishing an outreach program, please refer to the *Outreach Programs Handbook*

(http://www.learning.gov.ab.ca/educationsystem/OutreachProgHandbook.pdf)

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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:

Submit to Zone Services Branch, Alberta Learning, 9th Floor East, 44 Capital Boulevard, 10044 - 108 Street, Edmonton, Alberta, T5J 5E6

Date

Director

04AL1.3 Page 4 of 4



REPORT OF JUNIOR HIGH AND SENIOR HIGH HOME EDUCATION STUDENTS

WHOSE ADLC COURSES WERE FULLY FUNDED BY THE SCHOOL AUTHORITY FOR HOME EDUCATION STUDENTS ENROLLED ON SEPTEMBER 30, 2004 OR WHO MOVED FROM ANOTHER SUPERVISING BOARD AFTER SEPTEMBER 30, 2004

For the School Year: September 1, 2004 to August 31, 2005

Name of School Authority:				Authority Code:			
Name of School	:		Scl	nool Code:			
Alberta Student Number	ADLC File No.	Name of Student (Alphabetical) Surname / Given Name(s)	Grade	Course Code	Approved ADLC Course Costs		
				TOTAL	\$		
PLEASE REFER COSTS	ТО АТТАСНЕ	D COURSE LEGEND AND CLAIMABI	LE AMOUN				
		CERTIFICATION					
	I certify	that the information reported on this for	rm is correc	et.			
(Signature of Secreta	nry-Treasurer/Su	perintendent) (Signature of:	Teacher/Pr	incipal)	(Date)		

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course		Registration		Claimable
	Code	Subject	Fee	Compulsory	Amount
Grade Seven	7100	Language Arts 7	\$145.00	None	\$145.00
	7110	Mathematics 7	\$185.00	None	\$185.00
	7130	Health & Personal Life Skills 7	\$185.00	10.00	\$195.00
	7140	Science 7	\$185.00	\$30.00	\$215.00
	7150	Social Studies 7	\$185.00	\$25.00	\$210.00
	7160	Physical Education	\$160.00	None	\$160.00
	7310	Art A	\$120.00	None	\$120.00
	7350	French A	\$120.00	None	\$120.00
	7360	German A	\$120.00	None	\$120.00
	7380	Ukrainian A	\$120.00	None	\$120.00
	7410	Music A	\$160.00	None	\$160.00
	7570	Environmental and Outdoor Education (Year 1)	\$160.00	None	\$160.00
Grade Eight	8100	Language Arts 8	\$145.00	None	\$145.00
	8110	Mathematics 8	\$185.00	None	\$185.00
	8130	Health & Personal Life Skills 8	\$185.00	\$15.00	\$200.00
	8140	Science 8	\$185.00	None	\$185.00
	8150	Social Studies 8	\$185.00	\$15.00	\$200.00
	8310	Art B	\$120.00	None	\$120.00
	8350	French B	\$120.00	None	\$120.00
	8360	German B	\$120.00	None	\$120.00
	8380	Ukrainian B	\$120.00	None	\$120.00
	8460	Ethics	\$160.00	None	\$160.00
Grade Nine	9100	Language Arts 9	\$185.00	None	\$185.00
	9110	Mathematics 9	\$185.00	None	\$185.00
	9130	Health & Personal Life Skills 9	\$185.00	None	\$185.00
	9140	Science 9	\$185.00	\$90.00	\$275.00

NOTE: Alberta Distance Learning Centre - All invoices supporting the claimable amount of ADL course costs must be retained on file for review by Alberta Learning Page 2 of 10

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course		Registration		Claimable
	Code	Subject	Fee	Compulsory	Amount
Grades	9150	Social Studies 9	\$185.00	\$10.00	\$195.00
10, 11, and 12	9210	Mathematics Modified 9	\$185.00	None	\$185.00
	9310	Art C	\$120.00	None	\$120.00
	9350	French C	\$120.00	None	\$120.00
	9380	Ukrainian C	\$120.00	None	\$120.00
	AGR 1010	Agriculture 1010	\$51.00	None	\$51.00
	AGR 1060	Agriculture 1060	\$51.00	None	\$51.00
	AGR 1110	Agriculture 1110	\$51.00	None	\$51.00
	CMH 1010	Community Health 1010	\$51.00	None	\$51.00
	CMH 1050	Community Health 1050	\$51.00	None	\$51.00
	CMH 1060	Community Health 1060	\$51.00	None	\$51.00
	CMH 2010	Community Health 2010	\$51.00	None	\$51.00
	CMH 2030	Community Health 2030	\$51.00	None	\$51.00
	CMH 2050/3050	Community Health 2050	\$180.00	\$10.00	\$190.00
	CMH 3010	Community Health 3010	\$51.00	None	\$51.00
	CMH 3020	Community Health 3020	\$51.00	None	\$51.00
	CMH 3030	Community Health 3030	\$51.00	None	\$51.00
	CMH 3040	Community Health 3040	\$51.00	None	\$51.00
	CMH 3140	Community Health 3140	\$51.00	None	\$51.00
	COM 1020	Communication Tech. 1020	\$51.00	None	\$51.00
	COM 1070	Communication Tech. 1070	\$51.00	None	\$51.00
	COM 2110	Communication Tech. 2110	\$40.00	None	\$40.00
	COM 3120	Communication Tech 3120	\$40.00	None	\$40.00
	CTR 1010	Career Transitions 1010	\$51.00	None	\$51.00
	CTR 1110	Fashion Studies CTR1110	\$25.00	None	\$25.00
	CTR 1120	Fashion Studies CTR1120	\$25.00	None	\$25.00

NOTE: Alberta Distance Learning Centre - All invoices supporting the claimable amount of ADL course costs must be retained on file for review by Alberta Learning Page 3 of 10

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course		Registration		Claimable
	Code	Subject	Fee	Compulsory	Amount
Grades	CTR 2110	Fashion Studies CTR2110	\$25.00	None	\$25.00
10, 11, and 12	CTR 2120	Fashion Studies CTR2120	\$25.00	None	\$25.00
	CTR 2130	Fashion Studies CTR2130	\$25.00	None	\$25.00
	CTR 2140	Fashion Studies CTR2140	\$25.00	None	\$25.00
	CTR 2150	Fashion Studies CTR2150	\$25.00	None	\$25.00
	CTR 3110	Legal Studies 3110	\$51.00	None	\$51.00
	DES 1010	Design Studies 1010	\$51.00	None	\$51.00
	DES 1020	Design Studies 1020	\$51.00	None	\$51.00
	DES 1060	Design Studies 1060	\$51.00	None	\$51.00
	DES 2010	Design Studies 2010	\$51.00	None	\$51.00
	ELA 1104	English 10-2	\$175.00	None	\$175.00
	ELA 1105	English 10-1	\$175.00	None	\$175.00
	ELA 2104	English 20-2	\$175.00	None	\$175.00
	ELA 2105	English 20-1	\$185.00	None	\$185.00
	ELA 3104	English 30-2	\$185.00	None	\$185.00
	ELA 3105	English 30-1	\$190.00	None	\$190.00
	ELT 1010	Electro-Technologies 1010	\$51.00	None	\$51.00
	ENT 1010	Enterprise & Innovation 1010	\$51.00	None	\$51.00
	ENT 1020	Enterprise & Innovation 1020	\$51.00	None	\$51.00
	ENT 2010	Enterprise & Innovation 2010	\$51.00	None	\$51.00
	ENT 2020	Enterprise & Innovation 2020	\$51.00	None	\$51.00
	ENT 2030	Enterprise & Innovation 2030	\$51.00	None	\$51.00
	ENT 3010	Enterprise & Innovation 3010	\$51.00	None	\$51.00
	FAS 1030	Fashion Studies 1030	\$51.00	None	\$51.00
	FAS 1040	Fashion Studies 1040	\$51.00	None	\$51.00
	FAS 1050	Fashion Studies 1050	\$51.00	None	\$51.00

NOTE: Alberta Distance Learning Centre - All invoices supporting the claimable amount of ADL course costs must be retained on file for review by Alberta Learning Page 4 of 10

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course		Registration		Claimable
	Code	Subject	Fee	Compulsory	Amount
Grades	FAS 1060	Fashion Studies 1060	\$51.00	None	\$51.00
10, 11, and 12	FAS 1070	Fashion Studies 1070	\$51.00	None	\$51.00
	FAS 2070	Fashion Studies 2070	\$51.00	None	\$51.00
	FAS 2080	Fashion Studies 2080	\$51.00	None	\$51.00
	FAS 2090	Fashion Studies 2090	\$51.00	None	\$51.00
	FAS 2110	Fashion Studies 2110	\$51.00	None	\$51.00
	FIN 1010	Financial Management 1010	\$51.00	None	\$51.00
	FIN 1020	Financial Management 1020	\$51.00	None	\$51.00
	FIN 1030	Financial Management 1030	\$51.00	None	\$51.00
	FIN 2010	Financial Management 2010	\$51.00	None	\$51.00
	FIN 2020	Financial Management 2020	\$51.00	None	\$51.00
	FIN 2030	Financial Management 2030	\$51.00	None	\$51.00
	FIN 2040	Financial Management 2040	\$66.00	None	\$66.00
	FIN 3010	Financial Management 3010	\$51.00	None	\$51.00
	FIN 3020	Financial Management 3020	\$51.00	None	\$51.00
	FIN 3030	Financial Management 3030	\$51.00	None	\$51.00
	FIN 3040	Financial Management 3040	\$51.00	None	\$51.00
	FIN 3060	Financial Management 3060	\$51.00	None	\$51.00
	FNA 1400	Art 10 3 credits	\$88.00	None	\$88.00
		4 credits	\$114.00	None	\$114.00
		5 credits	\$145.00	None	\$145.00
	FNA 1405	Art 11	\$185.00	None	\$185.00
	FNA1424	Music 10	\$130.00	None	\$130.00
	FNA 2400	Art 20	\$155.00	None	\$155.00
	FNA 2405	Art 21	\$185.00	None	\$185.00
	FNA 3405	Art 31	\$185.00	None	\$185.00

NOTE: Alberta Distance Learning Centre - All invoices supporting the claimable amount of ADL course costs must be retained on file for review by Alberta Learning Page 5 of 10

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course		Registration		Claimable
	Code	Subject	Fee	Compulsory	Amount
Grades	FOR 1010	Forestry 1010	\$51.00	None	\$51.00
10, 11, and 12	FOR 1090	Forestry 1090	\$51.00	None	\$51.00
	FOR 2010	Forestry 2010	\$51.00	None	\$51.00
	FSL 1305	French 13	\$230.00	\$35.00	\$265.00
	FSL 1309	French 10	\$230.00	\$25.00	\$255.00
	FSL 2309	French 20	\$230.00	\$50.00	\$280.00
	FSL 3309	French 30	\$230.00	\$20.00	\$250.00
	GER 1315	German 10	\$145.00	\$20.00	\$165.00
	GER 2315	German 20	\$145.00	\$15.00	\$160.00
	GER 3315	German 30	\$145.00	\$15.00	\$160.00
	INF 1020	Information Processing 1020	\$76.00	None	\$76.00
	INF 1030	Information Processing 1030 MAC	\$40.00	None	\$40.00
	INF 1030	Information Processing 1030WIN	\$51.00	None	\$51.00
	INF 1040	Information Processing 1040 MAC	\$40.00	None	\$40.00
	INF 1040	Information Processing 1040WIN	\$40.00	None	\$40.00
	INF 1050	Information Processing 1040 MAC	\$40.00	None	\$40.00
	INF 1050	Information Processing 1050WIN	\$51.00	None	\$51.00
	INF 1060	Information Processing 1060 MAC	\$40.00	None	\$40.00
	INF 1060	Information Processing 1060WIN	\$51.00	None	\$51.00
	INF 1080J	Information Processing 1080J	\$40.00	None	\$40.00
	INF 1080VB	Information Processing1080VB	\$51.00	None	\$51.00
	INF 2010	Information Processing 2010	\$51.00	None	\$51.00
	INF 2030	Information Processing 2030	\$76.00	None	\$76.00
	INF 2040	Information Processing 2040	\$76.00	None	\$76.00
	INF 2050	Information Processing 2050	\$51.00	None	\$51.00
	INF 2060	Information Processing 2060	\$51.00	None	\$51.00

NOTE: Alberta Distance Learning Centre - All invoices supporting the claimable amount of ADL course costs must be retained on file for review by Alberta Learning Page 6 of 10

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course		Registration		Claimable
	Code	Subject	Fee	Compulsory	Amount
Grades	INF 2070	Information Processing 2070	\$51.00	None	\$51.00
10, 11, and 12	INF 2080	Information Processing 2080	\$51.00	None	\$51.00
	INF 2090	Information Processing 2090	\$71.00	None	\$71.00
	INF 2100	Information Processing 2100	\$71.00	None	\$71.00
	INF 2110	Information Processing 2110	\$71.00	None	\$71.00
	INF 2120	Information Processing 2120	\$71.00	None	\$71.00
	INF 2150J	Information Processing 2150 J	\$40.00	None	\$40.00
	INF 2150VB	Information Processing 2150VB	\$51.00	None	\$51.00
	INF 2160J	Information Processing 2160 J	\$40.00	None	\$40.00
	INF 2160VB	Information Processing 2160VB	\$51.00	None	\$51.00
	INF 2170J	Information Processing 2170 J	\$40.00	None	\$40.00
	INF 2170VB	Information Processing 2170VB	\$51.00	None	\$51.00
	INF 2180J	Information Processing 2180 J	\$40.00	None	\$40.00
	INF 2180VB	Information Processing 2180VB	\$51.00	None	\$51.00
	INF 2190	Information Processing 2190	\$51.00	None	\$51.00
	INF 2200	Information Processing 2200	\$40.00	None	\$40.00
	INF 3030	Information Processing 3030	\$76.00	None	\$76.00
	INF 3040	Information Processing 3040	\$76.00	None	\$76.00
	INF 3050	Information Processing 3050	\$76.00	None	\$76.00
	INF 3060	Information Processing 3060	\$51.00	None	\$51.00
	INF 3070	Information Processing 3070	\$51.00	None	\$51.00
	INF 3090	Information Processing 3090	\$71.00	None	\$71.00
	INF 3120	Information Processing 3120	\$71.00	None	\$71.00
	INF 3150VB	Information Processing 3150VB	\$51.00	None	\$51.00
	INF 3160C	Information Processing 3160C	\$51.00	None	\$51.00
	INF 3170C	Information Processing 3170C	\$51.00	None	\$51.00

NOTE: Alberta Distance Learning Centre - All invoices supporting the claimable amount of ADL course costs must be retained on file for review by Alberta Learning Page 7 of 10

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course		Registration		Claimable
	Code	Subject	Fee	Compulsory	Amount
Grades	INF 3180	Information Processing 3180	\$51.00	None	\$51.00
10, 11, and 12	LDC 1344	Spanish 15	\$145.00	\$20.00	\$165.00
	LDC 2344	Spanish 25	\$145.00	\$20.00	\$165.00
	LDC 2460	Religious Studies 25	\$155.00	None	\$155.00
	LDC 3344	Spanish 35	\$145.00	\$35.00	\$180.00
	LGS 1010	Legal Studies 1010	\$51.00	None	\$51.00
	LGS 1020	Legal Studies 1020	\$51.00	None	\$51.00
	LGS 2010	Legal Studies 2010	\$51.00	None	\$51.00
	LGS 2020	Legal Studies 2020	\$51.00	None	\$51.00
	LGS 2030	Legal Studies 2030	\$51.00	None	\$51.00
	LGS 3010	Legal Studies 3010	\$51.00	None	\$51.00
	LGS 3040	Legal Studies 3040	\$51.00	None	\$51.00
	LGS 3050	Legal Studies 3050	\$51.00	None	\$51.00
	LGS 3080	Legal Studies 3080	\$51.00	None	\$51.00
	LOG 1010	Logistics 1010	\$41.00	None	\$41.00
	LOG 1030	Logistics 1030	\$41.00	None	\$41.00
	MAM 3010	Management and Marketing 3010	\$51.00	None	\$51.00
	MAM 3020	Management and Marketing 3020	\$51.00	None	\$51.00
	MAM 3030	Management and Marketing 3030	\$51.00	None	\$51.00
	MAM 3040	Management and Marketing 3040	\$51.00	None	\$51.00
	MAM 3050	Management and Marketing 3050	\$51.00	None	\$51.00
	MAT 1037	Mathematics 10 (Pure)	\$185.00	None	\$185.00
	MAT 1038	Mathematics 10 (Applied)	\$185.00	None	\$185.00
	MAT 1041	Mathematics Preparation. 10	\$185.00	None	\$185.00
	MAT 1225	Mathematics 14	\$185.00	None	\$185.00
	MAT 2037	Mathematics 20 (Pure)	\$185.00	None	\$185.00

NOTE: Alberta Distance Learning Centre - All invoices supporting the claimable amount of ADL course costs must be retained on file for review by Alberta Learning Page 8 of 10

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course		Registration		Claimable
	Code	Subject	Fee	Compulsory	Amount
Grades	MAT 2038	Mathematics 20 (Applied)	\$185.00	None	\$185.00
10, 11, and 12	MAT 2225	Mathematics 24	\$185.00	None	\$185.00
	MAT 3037	Mathematics 30 (Pure)	\$185.00	None	\$185.00
	MAT 3038	Mathematics 30 (Applied)	\$185.00	None	\$185.00
	MAT 3211	Mathematics 31	\$185.00	None	\$185.00
	OTH 1999	Special Projects 10 – 5 credits	\$105.00	None	\$105.00
	OTH 1999	Special Projects 10 – 3 credits	\$63.00	None	\$63.00
	OTH 2999	Special Projects 20 – 5 credits	\$105.00	None	\$105.00
	OTH 2999	Special Projects 20 – 3 credits	\$63.00	None	\$63.00
	OTH 3999	Special Projects 30 – 5 credits	\$105.00	None	\$105.00
	OTH 3999	Special Projects 30 – 3 credits	\$63.00	None	\$63.00
	PED 1445	Physical Education 10 credits- 3	\$103.00	None	\$103.00
		Credits – 5	\$145.00	None	\$145.00
	PED 0770	CALM (Careers Life Management)	\$113.00	None	\$113.00
	SCN 1270	Science 10	\$185.00	None	\$185.00
	SCN 1288	Science 14	\$185.00	None	\$185.00
	SCN 2231	Biology 20	\$185.00	\$20.00	\$205.00
	SCN 2242	Chemistry 20	\$185.00	\$20.00	\$205.00
	SCN 2261	Physics 20	\$185.00	\$10.00	\$195.00
	SCN 2270	Science 20	\$185.00	\$30.00	\$215.00
	SCN 2285	Science 24	\$185.00	None	\$185.00
	SCN 3230	Biology 30	\$185.00	\$20.00	\$205.00
	SCN 3240	Chemistry 30	\$185.00	\$10.00	\$195.00
	SCN 3260	Physics 30	\$185.00	\$40.00	\$225.00
	SCN 3270	Science 30	\$185.00	\$30.00	\$215.00
	SSN 2171	Personal Psychology 20	\$113.00	None	\$113.00

NOTE: Alberta Distance Learning Centre - All invoices supporting the claimable amount of ADL course costs must be retained on file for review by Alberta Learning Page 9 of 10

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course		Registration		Claimable
	Code	Subject	Fee	Compulsory	Amount
Grades	SSN 2172	General Psychology 20	\$113.00	None	\$113.00
10, 11, and 12	SSN 2176	General Sociology 20	\$113.00	None	\$113.00
	SSN 3166	World Geography 30	\$113.00	None	\$113.00
	SST 1150	Social Studies 10	\$185.00	None	\$185.00
	SST 1151	Social Studies 13	\$185.00	None	\$185.00
	SST 2150	Social Studies 20	\$185.00	None	\$185.00
	SST 2151	Social Studies 23	\$185.00	None	\$185.00
	SST 3150	Social Studies 30	\$185.00	None	\$185.00
	SST 3151	Social Studies 33	\$185.00	None	\$185.00
	TOU 1010	Tourism Studies 1010	\$51.00	None	\$51.00
	TOU 1040	Tourism Studies 1040	\$51.00	None	\$51.00
	TOU 1050	Tourism Studies 1050	\$51.00	None	\$51.00
	TOU 1060	Tourism Studies 1060	\$51.00	None	\$51.00
	TOU 1070	Tourism Studies 1070	\$51.00	None	\$51.00
	TOU 2050	Tourism Studies 2050	\$51.00	None	\$51.00
	TOU 3030	Tourism Studies 3030	\$51.00	None	\$51.00
	TOU 3040	Tourism Studies 3040	\$51.00	None	\$51.00
	TOU 3060	Tourism Studies 3060	\$51.00	None	\$51.00
	TOU 3070	Tourism Studies 3070	\$51.00	None	\$51.00
	TOU 3080	Tourism Studies 3080	\$51.00	None	\$51.00
	UKR 1355	Ukrainian 10	\$145.00	\$25.00	\$170.00
	UKR 2355	Ukrainian 20	\$145.00	\$15.00	\$160.00
	UKR 3355	Ukrainian 30	\$145.00	\$10.00	\$155.00
	WLD 1010	Wildlife 30	\$71.00	None	\$71.00



REPORT OF ADDITIONAL ADL COURSE COSTS FOR STUDENTS IN GRADES 1 TO 6

For home education students in grades 1 to 6 taking a full course load of ADL courses where the total compulsory course costs exceeded the 50% funding provided by the supervising board.

For the School Yea	ır: Septembe	r 1, 2004	to August 31, 2005				
Name of School Authority:			Authority Code:				
Name of School:	Name of School:						
Name of Student (Alphabetical) for which a full course load has been purchased Surname / Given Name(s)	Alberta Student Number	Grade	Costs in Exce 50% Funding pr by Supervising l	ovided			
	TOTAL		\$				
* PLEASE REFER TO THE CHART (on back ELIGIBLE FOR ADDITIONAL FUNDING.) FOR FULL COU	JRSE LOA	D INFORMATION AND FOR	R COSTS			
	CERTIFICA	TION					
I certify that the i	nformation repoi	rted on this	s form is correct.				
(Signature of Secretary-Treasurer/Superintend	dent) (Signature o	f: Teacher/Principal)	(Date)			

04AL1.4b RETURN TO: SCHOOL FINANCE

Alberta Distance Learning Centre (ADLC) Course Costs - Elementary 2004/2005

	G	Grade 1		Grade 2		Grade 3		Grade 4		Grade 5		Grade 6
Course	Thema	hematics 1		Thematics 2 Thematics 3 Language Arts 4		uage Arts 4	Language Arts 5		Langu	Language Arts 6		
Registration Textbooks	\$ \$	455.00 40.00	\$ \$	475.00 40.00	\$	465.00 30.00	\$ \$	210.00 35.00	\$	205.00 45.00	\$	190.00 30.00
Course	Mathen	natics 1	Mathe	ematics 2	Mathe	ematics 3	Math	Mathematics 4		ematics 5	Mathematics 6	
Registration Textbooks	\$	205.00	\$	205.00	\$	215.00 20.00	\$ \$	210.00 35.00	\$ \$	195.00 40.00	\$	190.00 40.00
Course							Socia	al Studies 4	Socia	l Studies 5	Socia	l Studies 6
Registration Textbooks							\$ \$	145.00 50.00	\$	145.00 60.00	\$ \$	145.00 50.00
Course							Scier	nce 4	Scien	ice 5	Science 6	
Registration Textbooks							\$	190.00 -	\$	210.00	\$	190.00
Total Cost	\$	700.00	\$	720.00	\$	730.00	\$	875.00	\$	900.00	\$	835.00
less: 50% funding provided by supervising board	\$	620.50	 \$	620.50	\$	620.50	\$	620.50	\$	620.50	\$	620.50
Excess costs eligible for additional funding	\$	79.50	\$	99.50	\$	109.50	\$	254.50	\$	279.50	\$	214.50



2004- 2005 PROGRAM UNIT FUNDING APPLICATION **EARLY CHILDHOOD SERVICES**

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 ap	plication 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:
Fax No:	E-Mail Address:
Number of Program Unit children: (claimed on this application)	Budget Amount: \$ (for this application)
Have any of these Program Unit children been with a pre	evious operator? YES NO
Has Basic Instruction funding been claimed for these ch	ildren? YES NO
NOTE: o The Budget amount is subject to change upon o Final payments will be based on the lesser of	n review by the Alberta Learning staff. the approved budget amount, funding ceiling or actual expenditures.
	DECLARATION
 and that: The parent(s) / guardian(s) of each child in this prograpplication is being submitted on the child's behalf. Each child has been identified through screening an teachers and/or child development specialists in accurate Funding Manual For School Authorities. Program goals for each child have been developed A program consistent with the special needs of each the most enabling educational environment. Consultative assistance will be provided to staff and Direct services will be provided to each child and/or 	parent(s) / guardian(s) as required. each child's progress and to decide on changes, where appropriate, in the program in
I certify that the programs identified in this report are being or information provided on this application is correct.	ffered in accordance with Alberta Learning program requirements and that the
(Signature of Secretary-Treasurer)	(Date)
APPROVED BY: (Signature of Performance Conspecial Programs Branch	Amount Approved: \$ertifier)
	Data Approved:

(Signature of Expenditure Officer) School Finance Branch

CRITERIA FOR DETERMINING ELIGIBILITY FOR PROGRAM UNIT FUNDING

Descriptions of Severe Disabling Conditions

Severe Cognitive Disability (Code 41)

A 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 child 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 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 child and other children. For example, the child could be dangerously aggressive and destructive (to self
 and/or others), violent and/or dangerously compulsive; and
- b) has either a diagnosis or a statement by a qualified professional indicating that the child experiences severe 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 on the nature, frequency and severity of the disorder by **school authorities**. In the case of an ECS child who is not currently placed in an educational 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 child's functioning in an education setting should be described. An ongoing treatment plan/behaviour plan should be available and efforts should be made to ensure that the child has access to appropriate mental health and therapeutic services.

A clinical diagnosis of a severe emotional/ behaviour 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).

Note: ECS children diagnosed with Fetal Alcohol Spectrum Disorder (FASD) in the most severe cases should be reported under Code 44 rather than Code 42.

Severe Multiple Disability (Code 43)

A 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 child functioning at a severe to profound level; and
- b) requires significant special programs, resources and/or therapeutic services.

ECS children with a severe disability and another associated disability should be identified under the category of the primary severe disability. For example:

- An ECS child with a severe cognitive disability and another associated disability is not designated under this category, but is
 designated under severe cognitive disability.
- An ECS child with a severe emotional/behavioural disability and another associated disability is not designated under this category, but is designated under severe emotional/ behavioural disability.

The following mild or moderate disabilities cannot be used in combination with other disabilities to qualify under Code 43:

- a) Attention Deficit / Hyperactivity Disorder (AD/HD)
- b) Emotional/Behavioural Disabilities
- c) Speech and Language Related Disabilities

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 child with a severe physical, medical or neurological disability is one who:

- a) has a medical diagnosis of a physical disability, a specific neurological disorder or medical condition which creates a significant impact on the child's ability to function in the school environment (note: some physical or medical disabilities have little or no impact upon the child's ability to function in the school environment); and
- b) requires extensive adult assistance and modifications to the learning environment in order to benefit from schooling.

A 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 child with autism.

04AL2.3a Page 2

In order for a diagnosis of autism to be made, the child needs to demonstrate impairment in the following areas:

- social interaction and
- communication: and
- stereotyped pattern of behaviour (i.e. hand flapping, body rocking, echolalia, insistence on sameness and resistance to change).

A 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. A clinical diagnosis by a psychiatrist, chartered psychologist with specialized training, or medical professional specializing in developmental disorders 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 child with FASD. 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 child with a profound hearing loss is one who:

- a) has a hearing loss of 71 decibels (dB) or more unaided in the better ear over the normal speech range (500 and 4000 hertz (Hz)) which interferes with the use of oral language as the primary form of communication or has a cochlear implant preceded by a 71 dB hearing loss unaided in the better ear; and
- b) requires extensive modifications 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 child has a severe to profound sensori-neural hearing loss that has not changed significantly since the initial approval by Alberta Learning, 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 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 a 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 child has a severe to profound visual impairment that has not changed significantly since the initial approval by Alberta Learning, 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 children who may be difficult to assess (e.g. cortical blindness – developmentally delayed), a functional visual assessment by a specialist in the field of vision or a medical professional may be sufficient to support eligibility.

Revised 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 total language. Please use the following criteria for determining 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 a <u>severe</u> phonological delay and <u>at least a moderate</u> expressive, receptive or total language delay (on a formal assessment of language); or
- c) A child who has <u>at least a moderate to severe</u> expressive, receptive or total language delay (on a formal assessment of language) and <u>at least a moderate to severe</u> delay in one or more of the following areas of development: fine motor, gross motor, vision, hearing.

Alberta Learning 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 identified under Code 43.

04AL2.3a Page 3

DETAILS OF CHILDREN IN PROGRAM UNIT(S)

	Alberta Student Number		Age	Dat	te of B	irth	Location(s) of Child's	R	**Assesse d Primary		Starts		Date Program of Centre		In-Home Programs***			
	(ASN) #	Name of Child Surname/Given Name(s)	Dept Use Only	Yr.	Mo.	Day	Program (including AM or PM)	N*	Disability Code	Yr.	VIo.	Эау	۲r.	lo.	Day	Program Hours	Total # of Visits	otal # c Visit Hours
		FIRST PROGRAM UNIT																
1.																		
2.																		
3.																		
4.																		
5.																		
6.					-	-					-	-						-
		SECOND PROGRAM UNIT																
1.		SECOND FROGRAM UNIT																
2.		+																
3.																		
4.																		
5.																		
6.																		
		THIRD PROGRAM UNIT																
1.																		
2.																		
3.																		
4.																		
5.																		
6.																		
		FOURTH PROGRAM UNIT																
1.																		
2.														<u> </u>				1
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/Behavioral 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 home visits for the school year and the total number of hours these visits comprise.

PROGRAM UNIT FUNDING (PUF) BUDGET

PLEASE SUBMIT A SEPARATE BUDGET FOR EACH UNIT	NAME(S)
	PROGRAM UNIT COSTS
INSTRUCTIONAL COSTS	
Salaries and Wages (# of hours————————————————————————————————————	\$
Employer's Portion of Fringe Benefits	\$
Services Purchased (Please specify service with # of hours and rate per ho	\$
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 # tripsX \$	
In-Home Programs # visitsX \$	
Other: - Field Trips	
In-Program Transportation	
Total Transportation Costs	(A)
LESS: TRANSPORTATION REVENUES	
Alberta Learning Special Needs Transportation Funding: (See Funding Manu 1, Sections 1.19 - 1.22 for School Jurisdictions.)	ual, Part 2, Section 2.4 and 2.5 for Private ECS Operators and Part
Special Transportation # trips X \$11.97	
Regular Transportation # children X \$445/yr	
In-Home Transportation # visits X \$11.97	
Other Transportation Revenues (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 appro-	opriate specialist supporting the capital purchase.
TOTAL PROGRAM UNIT COSTS	\$
Guidelines for the above expenditure areas are found in the Funding Manual, Part	t 1, Section 1.6 or Part 2, Section 2.3
DEPT. USE ONLY CEILING AMOUNT (based on program hours and # of ho	

TOTAL ECS PROGRAM BUDGET FOR <u>DESIGNATED SPECIAL EDUCATION ECS PROGRAMS</u> APPLYING FOR PROGRAM UNIT FUNDING (PUF)

INSTRUCTIONAL COSTS	ECS PROGRAM COSTS
Salaries and Wages (Please attach 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 \$	
In-Home Programs # visits 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, Sections 2.4 at and Part 1, Sections 1.19 - 1.22 for School Jurisdictions)	nd 2.5 for Private ECS Operators
Special Transportation # trips X \$11.97	
Regular Transportation #children X \$445/yr	
In-Home Transportation	
Other Transportation Revenues	
Total Transportation Revenues (B)	
NET TRANSPORTATION COSTS: (Costs (A) less Revenue (B), if difference is negative, enter \$0) =	\$
FACILITY COSTS: (Please attach a list of costs)	\$
ADMINISTRATION: Please attach a breakdown of costs)	\$
CAPITAL COSTS:	
Furniture and Equipment: (Please attach a list of costs)	\$
TOTAL ECS PROGRAM COSTS	\$
AB. Learning Base Instruction Mild or Moderate Plant Operation and Maintenance ABLearning Other (please attach a list) ECS Administration (private ECS operators only) Other Revenues (please specify) TOTAL REVENUES	\$(
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 children's program hours and number of home visits) \$_____



EARLY CHILDHOOD SERVICES

ECS PROGRAM UNIT FUNDING STATEMENT OF ACTUAL EXPENDITURES FOR SCHOOL JURISDICTIONS 2004-2005 SCHOOL YEAR

NAME OF SCHOOL JURISDICTION:

• • • Cont	 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, Section1.6. Contact Name: Telephone No					
FUND	ING CALCULATION:	CERTIFICATION				
i)	Actual Expenditures (from p. 2)	\$				
ii)	Approved Budgets Total (dept. only)	\$				
iii)	Funding Ceiling Total (dept. only)	\$				
	fy that the information reported on this form is program.	s correct and that the above costs have not been claimed under any				
	(Signature of Secretary-Treasurer)	(Date)				
		EPARTMENT USE ONLY: oproved \$				

(Date)

(Signature of Expenditure Officer)

APPROVED BY:



ECS PROGRAM UNIT FUNDING STATEMENT OF ACTUAL EXPENDITURES FOR SCHOOL JURISDICTIONS 2004/2005 SCHOOL YEAR

NAME OF SCHOOL JURISDICTION:				
			ACTUAL EXPENDITURES	
INSTRUCTION				
Salaries and Wages			\$	
Employer's Portion of Frin	ge Benefits		\$	
Services Purchased			\$	
Supplies and Materials			\$	
PARENT INSERVICE/STAFF	INSERVICE		\$	
TRANSPORTATION COSTS:				
	Actual Cost (A)	Revenue (B)		
To and From School	\$	\$		
In-Home Visits	\$	\$		
Other TOTALS	\$ \$	\$		
TOTALS	Ψ	Φ		
NET Transportation Cos	ts: (A) - (B) (if differe	nce is negative, enter 0	\$	
ADMINISTRATION COSTS (f	or Designated Sp. Ed. I	ECS Operators only)	\$	
CAPITAL: FURNITURE AND (ONLY capital equipment Please attach a list of capital equipment)	\$ eside each.			
TOTAL ECS PUF EXPE	NDITURES		\$	

FOR DESIGNATED SPECIAL EDUCATION ECS PROGRAMS ONLY

Please indicate the number of ECS children enrolled on Sept. 30 for this program
 Base Instruction and any other applicable revenues for these children will be applied to the total program costs and the net costs will be eligible for program unit funding.



Program Unit Funding PUF APPLICATION ADJUSTMENTS FORM 2004 - 2005 School Year

NAME OF SCHOOL AUTHORITY:					
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 Home Visits Provided:		Number of Home Vis	it Hours:		
ESTIMATE OF ALL COSTS INCURRED: Ple cluster please provide revised budget for all	•		category (if child is in	n a	
Teacher Assistant Salaries/wages (# of hours	x	rate per h	our) \$		
Employer's Portion of Fringe Benefits			\$		
Services Purchased (Please specify service with(# of hours	x x x	rate per hour) rate per hour) rate per hour)	\$		
Supplies and Materials			\$		
Parent In-service – Please specify			\$		
Staff In-service – Please specify			\$		
Transportation Costs:					
To and from school # trips	x\$	\$			
In-Home Programs # visits	x\$	\$			
Other: - Field Trips		\$			
 In-Program Transportation 		\$			
Total Transportation Costs			\$		
Capital Costs:			\$		
Total PUF Costs:			\$		



EARLY CHILDHOOD SERVICES APPLICATION FORM TRANSPORTATION FUNDING 2004 - 2005 School Year

Only funded children enrolled as of September 30 may be claimed on this form.

	Name of Private ECS Operator	
INS	STRUCTIONS:	
Со	mplete this form using: (a) the number of children with disabilities being (b) the number of days transported. (c) the number of regular children being transported the number of planned in-home visits.	
DA	TE PROGRAM BEGINS:	DATE PROGRAM ENDS:
1	Regular Transportation (private ECS operators Number of eligible transported ECS children transported by a school bus, public transit system, or parent.	only) X \$445 = \$
2	Special Transportation Total number of days transported for all ECS children with disabilities requiring special transportation.	X \$11.97 = _\$
	Number of special needs children requiring special transportation.	
3	Home Visits Total number of home visits for all ECS children with special needs.	X \$11.97 = _\$
	Number of special needs children home visits are	provided for.
		TIFICATION wledge, the number of children transported, the number of d, are correct.
	(Signature of Secretary-Treasu	rer) (Date)



High Speed Networking Funding Application

For the School Year: September 1, 2004 to August 31, 2005

Name of Sch	Name of School Authority:					
Authority Co	Authority Code:					
Contact Nam	ne/Phone/Email:					
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 (STE	Approved by(STB)(Date)					



3-YEAR CLASS SIZE PLAN

JURISDICTION NAME:	

SECTION A – Introduction

[Provide here an overview of your approach for distributing the class size funding (i.e. central vs. site-based). This overview should be consistent with the priorities and strategies in your 3-Year Education Plan.]

SECTION B – Context

[Describe here your current situation: average class size, projected enrolment, constraints, other factors which will enhance or limit the implementation of your class size plan.]

	2003-04	2004-05	2005-06	2006-07
	Class Size	Jurisdiction	Jurisdiction	Commission
	Average*	Averages**	Averages**	Guidelines***
K-3				17
Grades 4-6				23
Grades 7-9				25
Grades 10-12				27

^{*} As reported by your jurisdiction in the 2003-04 class size survey

^{***} Includes special education classes

2004-05	2005-06	2006-07
Class Size	Class Size	Class Size
Funding	Funding	Funding
Allocation*	Allocation*	Allocation*
\$	\$	\$

^{*} As provided by Alberta Learning

		Enrolment Change Projections Increase (or decrease) in Funded Headcount (ECS @ 0.5)		
	2003-04 Total Enrolment	2004-05	2005-06	2006-07
K-3				
Grades 4-6				
Grades 7-9				
Grades 10-12				

SECTION C – Jurisdiction Plan Summary

	Amount Spent on New Teacher FTEs (Section D)	Amount Requested for Other In-Classroom or Student Support (Section F)	Amount Requested for Deferral (Section F)	Total Allocation*
2004 - 05 SY				
2005 – 06 SY				
2006 – 07 SY				

^{*}Should equal Class Size Funding allocation above.

^{**} As projected by your jurisdiction

<u>SECTION D</u> - Jurisdiction plan to achieve class size guidelines set by Alberta's **Commission on Learning (ACOL):**

1. 2004-05 School Year

[Please complete the following table]

School Name	Number of New Teacher FTEs Hired (or planned to be hired) from Class Size Funding
aaa	1.5
bbb	4.0
ccc	3.5
Total	9

	All 4º CNI ID I DIDID	1 1 0 15
	Allocation of New Teacher FTEs	Actual Cost*
	(or planned to be hired) from	
	Class Size Funding	
K to grade 3	5.5	\$
Grades 4 to 6	2.5	
Grades 7 to 9	1.0	
Grades 10 to 12	0	
	9	\$

^{*} Certificated salary and benefits only

Change (+, -) in 2004-05 teacher FTEs due to enrolment or other factors*:

Rationale: [Describe here the rationale for choosing these particular schools/grades to target in this year. Also indicate where this deployment will put you in terms of achieving ACOL guidelines. If you will not be at ACOL guidelines and have not spent all your Class Size Funding on teachers, explain why. Details of requested one-time initiatives should be entered in Section F.]

2. 2005-06 School Year Projections	Number of New
v	Teacher FTEs
New teacher FTEs hired from Class Size Funding	
2004-05 FTEs from Class Size Funding maintained	
Change (+, -) in teacher FTEs due to enrolment OR other factors*	
Total	

^{*}i.e. change in jurisdiction revenue due to student complexity (severe, ESL, Aboriginal) or other Renewed Funding Framework formulas

Rationale: [Describe here your jurisdiction's Year 2 plan for allocating the class size funding. Also indicate where this will put you in terms of achieving ACOL guidelines. If you will not be at ACOL guidelines and have not spent all your Class Size Funding on teachers, explain why. Details of requested one-time initiatives should be entered in Section F.]

3. 2006-07 School Year Projections	Number of New Teacher FTEs
New teacher FTEs hired from Class Size Funding	
2004-05 and 2005-06 FTEs from Class Size Funding maintained	
Change (+, -) in teacher FTEs due to enrolment OR other factors*	
Total	

^{*}i.e. change in jurisdiction revenue due to student complexity (severe, ESL, Aboriginal) or other Renewed Funding Framework formulas

^{*}i.e. change in jurisdiction revenue due to student complexity (severe, ESL, Aboriginal) or other Renewed Funding Framework formulas

Rationale: [Describe here your jurisdiction's **Year 3 plan** for allocating the class size funding. Also indicate where this will put you in terms of achieving ACOL guidelines. If you will not be at ACOL guidelines and have not spent all your Class Size Funding on teachers, explain why. Details of requested one-time initiatives should be entered in Section F.]

SECTION E – Infrastructure Impact

- 1. Can your plan be accommodated within your current infrastructure?
- 2. If you are unable to accommodate at a specific school, can boundaries be revised to accommodate incoming students at an adjacent school where there is space?
- 3. If no space is available at a school or adjacent schools, list the schools that are affected and describe the additional infrastructure that is required (portable, etc.).

This section only applie	es if (please check one):			
	,			
1. Your jurisdiction	n has achieved class size guidel	lines in <u>all</u> gro	ade categories	<i>S</i> .
OR				
	n is unable to hire teachers due ntrol. Requested initiatives mus		ease describe)
penefit students in the c	elow, describe each initiative (in classroom and what results you school years also require justific	expect to achi		
		2004-05	2005-06	2006-07
Initiative #1		\$	\$	\$
[description]				
Initiative #2				
[description]				
Initiative #3				
[description]				
Total Initiatives		\$		
Total Requested for D	eferral			
[due to]				
School Year Total		\$		
SECTION G – Appro	val ze plan has been approved for s	ubmission to t	he Minister o	f Learning.
Board Chair	Superintendent		Secretary-Treasurer	



INSTITUTIONAL PROGRAMS Funding Application Form 2004/2005

For the School Year: September 1, 2004 to August 31, 2005

NAME OF SCHOOL AUTHORITY:								
CONTACT PERSON:	TELEPHON	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						
I certify that the students claimed for this funding reside in an institution per Section 44(7) of the <i>School Act</i> (RSA 2000) or are temporary restitutional program(s) are under contract to Alberta Learning or has Branch of Alberta Learning, and that the programs identified in this resulting program requirements. (Signature of Superintendent or Designate)	sidents of a women's she ve had prior approval froi	elter. I also certify that the method the the special Programs						
I certify that the information reported on this form is correct.								
(Signature of Secretary Treasurer)	_	(Date)						
DEPARTMENT US	E ONLY:							
Total Net Program Costs = \$								
Performance Certifier		Date						
Expenditure Officer		Date						



REGULAR INSTITUTIONAL PROGRAMS BUDGETED / FINAL COSTS 2004/2005

NAW	E OF PROGRAM:			_
CON	TACT PERSON:	TELEPHON	IE:	
Manu	e see Instructions (attached) for completion of this form. A al for School Authorities. Note: if your program has some Institutional Program and must complete the form for Mix	non-institutional	students, you are conside	red a
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)		\$	_
ТОТА	L PROGRAM COSTS		\$	A
REVE	NUES RECEIVED FOR INSTITUTIONAL STUDENTS			
	Note: please do not include Institutional funding.			
	1. Base Instruction (based on Sept 30 enrolments of 550	coded students)	\$	
	2. Other funding (please specify)		\$	
TOTA	L REVENUES		\$	в
NET F	PROGRAM COSTS (Total Program Costs less total revenues	(A - B = C.)	\$	c
	nge number of students enrolled o calculate the average number of students enrolled:			D
. `				

- 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 2004-2005 Budgets, please use monthly enrolments from the 2003-2004 school year. For 2004-2005 Finals, please use monthly enrolments for the 2004-2005 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 2004-2005 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 Learning. 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 2004-2005 Budgets, please use monthly enrolments from the 2003-2004 school year. For 2004-2005 Finals, please use monthly enrolments for the 2004-2005 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 BUDGETED / FINAL COSTS 2004/2005

NAME	OF PROGRAM:		
CONT	ACT PERSON:	TELEPHONE:	
Manual studen	see Instructions (attached) for completion of this form. Also for School Authorities. Note if your program only has instits), you are considered a Regular Institutional Program and ional Program rather than this form.	itutional students (and no non-institutional	
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	\$	_
	d. Education Services	\$	_
	d. Office Supplies	\$	_
	Total Supplies and Services Costs	\$	-
3.	Technology costs (see guidelines for formula)	\$	-
TOTAL	PROGRAM COSTS	\$	_A
Averag	e number of students enrolled (see guidelines for this calculat	tion)	B
Averag	e cost per student (A ÷ B)	\$	_c
Averag	e number of Institutional students enrolled (see guidelines)		D
PROGE	RAM COSTS FOR INSTITUTIONAL STUDENTS (C x D)	\$	_E
REVEN	UES RECEIVED FOR INSTITUTIONAL STUDENTS		
	only show revenues for institutional students. Please do not incluional funding nor any revenues for non-institutional students.	ude	
	1. Base Instruction (based on Sept 30 enrolments of 550 co	oded students) \$	_
	2. Other funding (please specify)	\$	
TOTAL	REVENUES FOR INSTITUTIONAL STUDENTS	\$	_F
NET PF	ROGRAM COSTS FOR INSTITUTIONAL STUDENTS (E - F)	\$	
Note: I	For Final claims, please attach a list of the institutional stude	lents (with ASN's) in attendance on Sept. 3	0

Instructions for Completion of 2004-2005 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,
- 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 Learning. 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 2004-2005 Budgets, please use monthly enrolments from the 2003-2004 school year. For 2004-2005 Finals, please use monthly enrolments for the 2004-2005 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



APPLICATION FOR RESIDENT STUDENTS OF THE GOVERNMENT AT FUNDED PRIVATE SCHOOLS

For the School Year: September 1, 2004 to August 31, 2005

This funding is no longer available for new students; however, it continues for resident students of the government who were approved in 1997/1998 and who continue to attend a funded private school

NAME OF SCHOOL AUTHO	ORITY:						
NAME OF CONTACT PERS	SON:		TELE	PHONE:			
Resident Stud Resident Stud	ents of the Go ents of the Go	vernment, exc vernment.	ept for contract	programs whe	re required for all re all students are		
Please indicate whether th	is is a Budge	t or a Final cla	aim, by checki	ng the approp	riate box.		
	BUDGETED	COSTS		FINAL	COSTS		
There are two ways to clai	m this grant:						
 If you have a set annual be the annual fee prorate If you do not have a set 	ed for the leng	th of time the s	student is in the	program.	. ,	, ,	
2. If you do not have a set	aririuar iee, trie	en page 2 or th	15 101111 WIII assi	st you in calcul	ating the het cost.		
	+	GRAM			CLAIM A		
	ENTRY DATE	ENTRY DATE		TYPE OF	(A)	(B)	
STUDENT'S NAME	YY/MM/DD	YY/MM/DD	GRADE	PROGRAM	ANNUAL FEE	NET COST	
If more space is re	equired please at	tach additional fo	orm.	TOTAL	\$	\$	
NOTE: Only claim Resident					are two or more stud	ents in the home.	
		CER	TIFICATION				
I certify that the private school fund (RSA 2000), and that the programs		ied in this report a	re Resident Studer				
(Signature of Superi	ntendent or Desig	nate)			(Date)		
I certify the information reported on	this form is correc	t.					
(Signature of Secretary-Treasurer) (Date)							
		DEPARTME	ENT USE ONLY	′ :			
Total Number of Resident Student	s of the Governme	ent =	Total An	nual Fees or Net C	Costs = \$		
(Performan	ce Certifier)				(Date)		
(Expenditure	Officer)		_				
` '	•						

RESIDENT STUDENTS OF THE GOVERNMENT

Net cost is calculated by subtracting all funding received from Alberta Learning from the total cost of the program:

Student Name:	rta Student Number			
Type of Program:				
EDUCATION COSTS:				
Please indicate the type and dolla	r amount of	each cost associated wit	th the stu	udent:
EXPENDITURES				
Instruction:	\$			
Transportation:	\$			
Other Costs: (Please specify)				
	\$			
	\$			
		TOTAL COST:	(1)	\$
REVENUES:				
Less:				
Alberta Learning Funding:				
Base Instruction	\$			
Transportation	\$			
Other Funding: (Please specify)				
	\$			
	\$			
	\$			
		TOTAL FUNDING RECEIVED:	(2)	\$
		NET COST = (1) MINUS (2)		\$

04AL6.1b Page 2 of 2



REGIONAL CONSORTIUM

Statement of Revenues & Expenses For the Year Ended August 31, 2004

(in whole dollars)

CONSORTIUM NAME:			
	Actual 2004/2005	Budget 2004/2005	Actual 2003/2004
REVENUES			
Alberta Learning:			
Management & Infrastructure (Note 1)			
Programming Grants (Note 2)			
(Specify) e.g. Special Education			
(Specify)			
Other Alberta Learning			
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, 2005

(in whole dollars)

CONSORTIUM NAME:	

	Actual 2004/2005	Actual 2003/2004
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)		
Prepaid Registration (Note 12)		
Other:		
(Specify)		
(Specify)		
Total Deferred Revenue		
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, 2005

CONSORTI	UM NAME:							
I certify correct.	•	information detailed on forms 1 and 2 (attached) is						
(Signatu	ure) Chair of Consortium	(Signature) Financial Officer						
	Date	Date						
	N	OTES						
Note 1	Management and Infrastructure grar the year).	nt from Alberta Learning (total amount allocated for						
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 repbe matched with the expenditures.	resents funding deferred to future years when it will						
Note 3	Registration rates are intended to expenses.	Registration rates are intended to cover the direct costs reported as programming expenses.						
Note 4	E.g. grants and subsidies from private	e 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 th	e 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, trav	el 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 pertaining to the current year.						
Note 11	E.g. Unpaid wages pertaining to the y	rear.						
Note 12	Pertaining to programming planned for	or subsequent year(s).						
Note 13	Board-approved funds earmarked for	future operations or programming.						
Note 14	Unrestricted Funds represent the ne operational reserves for earmarked p	t assets (total assets minus total liabilities) less any rogramming.						
Note 15	Accumulated Surplus is the total of o	perational reserves and unrestricted funds.						
Note 16	Please ensure that any over-expend	liture is offset by sufficient Accumulated Surplus at						

the beginning of the year.



CAPITAL LOAN INFORMATION

CAPITAL LOANS

For the School Year: September 1, 2004 to August 31, 2005

Date		Amount		Amount Amount		Amount Term		Outstanding	Supported Principal (A)	Supported Interest (B)	TOTAL
Authorized	Borrowed	Authorized	Borrowed	Eligible	Ineligible		Rate	Supported Balance August 31, 2004	Principal (A)	interest (B)	(A) + (B)
	TOTAL CAPITAL LOANS										

CERTIFICATION

	_
(Signature of Secretary-Treasurer)	(Date)
(Name of School Jurisdiction	nn)

- **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:

- 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 district, **division**, or Francophone Regional Authority.
- 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 students' best interests.
- **CHARTER BOARD** means the society or company that is named in a charter as being responsible for the operation of 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 2004-2005 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 Children's Charter School Society
- -New Horizon School
- -Suzuki Charter School Society
- -Westmount Charter School Society
- CHILD WITH A DISABILITY/DELAY means a funded child who is assessed and coded as having a mild, moderate or severe disability.
- CHILD WITH A MILD OR MODERATE DISABILITY/DELAY means a funded child 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 WITH A SEVERE DISABILITY/DELAY see definition of Students/Funded Children with Severe Disabilities in the Glossary of Terms.
- Revised CHILD WITH SPECIAL NEEDS means a funded child 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 program and is a mandatory requirement for any child with special needs.
 - **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 next **school** day following September 30 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. ECS programs with this designation may include children with mild or moderate disabilities 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	<u>Schools</u>
Black Gold Regional Division #18	East Elementary Early Entry ProgramEcole Bellevue
Calgary School District #19	 James Short Memorial School (Early Development Centre) Knob Hill Elementary School Queen Elizabeth Elementary
Edmonton School District #7	 Beacon Heights School Elmwood School Evansdale School Glenrose Hospital Hazeldean School Homesteader School Mayfield School Scott Robertson School Tevie Millar Heritage School Waverley School
Edmonton Catholic Separate School District #7	 St. Gabriel School (Hand in Hand Growing Through Experience)
 Elk Island Public School Regional Division #14 	 REACH Program
 Grande Prairie Public School District #2357 	 Crystal Park Pre-School Program
Greater St. Albert Catholic Regional Division #29	Vital Grandin SchoolVanier Elementary School
Medicine Hat School District #76	Herold Pre-SchoolRiverside SchoolElm Street School
 Medicine Hat Catholic #20 	 St. Louis Early Dev. Program
 Parkland School Division # 70 	 Broxton Park School
 Pembina Hills Regional Division #7 	 Westlock Elementary Early Ed. Program
 Rocky View School Division #41 	 Preschool Intervention Program (PIP) (Elizabeth Barrett School)
 Wetaskiwin Regional Division #11 Designated ECS Programs in EC Calgary Quest Children's Society Children's Services Centre – Red Deer Community Options Connect Society DEAF Services Corbett Hall Early Education Program ECS Learning Association/Cause & Effect Elves Special Needs Society Family Linkages H.OM.E.S Home Opportunities for Multi-Handicapped 	 Wetaskiwin Early Ed. Center (WEEC) S Private Operators - Centre GRIT Calgary Horizon School New Heights Early Learning Services PACE Providence Child Development Centre Renfrew Educational Services Salvation Army Children's Village Society for the Treatment of Autism The Heartland Agency
Educational Services	The PREP Program

DESIGNATED SPECIAL EDUCATION PRIVATE SCHOOL is a **private school** that meets the following criteria:

- 1. 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.
- 2. The educational programs provided to the students require modifications or adaptations to the Program of Study, and are specified in the **Individualized Program Plans (IPP)** developed and implemented for each student;

Revised

For the 2004/2005 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 Counselling 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 Educational Services 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)

Revised (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 a term used in Rural Transportation Block funding. **Distance** refers to the **eligible transportation distance** from where each **eligible passenger** resides to their **designated school** or **school** of choice, whichever is closest.

- **DIVISION** 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**.
- **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 in which a portion of the township is privately owned; and
- two square miles per mile of road corridor through vacant townships between populated areas.
- **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** a **child with a disability** in a program unit who is transported to and from **school**:

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 **educational 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 a 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*; or
- 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;
- **Revised** 3. A **student with a disability** requiring transportation to and from school and who is unable to walk to **school** as the result of a disability;
 - 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 for ASFF purposes as defined in the Alberta School Foundation Fund Regulation, means a student who:

- 1. On September 30, meets the requirements 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 in which the student is counted;
- 5. Is not a student enrolled in a **home education program**;
- 6. Is not a **funded child** to whom an **early childhood services program** is being provided pursuant to Section 30(1)(a) of the *School Act*; and
- 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 purposes 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 on which the residence of the **eligible passenger** is situated to the **designated school** in

kilometres on a travelled 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** enrolled in an **ECS program** who resides at least 2.4 kilometres from the program in which the **funded child** is enrolled. This distance limit does not apply to children who are funded through Special Transportation funding.
- **EXPECTED ELIGIBLE PASSENGER** is a term used in Section 1.20 Metro Urban Transportation Block 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 FIRST NATIONS CHILD/STUDENT WITH STATUS WHO RESIDES ON A RESERVE
 A person registered under the Indian Act who lives on a reserve. These students are the responsibility of 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 REGIONAL AUTHORITY** means a Regional Authority for a Region established by the Minister under section 255 of the *School Act*.
 - **FRANCOPHONE EDUCATION PROGRAM** means a program operated by a Francophone Regional authority under Section 10 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.

Revised FUNDED CHILD means an individual who:

- attends an ECS program in 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 Sept 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, 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	Base Instruction and Program Unit (Maximum 3 years funding)	2 years 6 months
ECS child who is developmentally Immature	Base Instruction (Maximum 2 years funding)	5 years 6 months

*ECS operators need to take into consideration the grade one **school** entrance age in the community when enrolling children in an ECS program. Children with severe disabilities will be funded for a maximum of three years while they are of ECS age. Children with a mild or moderate disability 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; and

This definition of a funded child <u>does not</u> 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 PRIVATE SCHOOL means an accredited private school as defined in Sec 28 (2) of the School Act that receives a grant under the Learning Grants Regulation.

Updated 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 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
 - 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
 - in another province or country under a reciprocal exchange program approved by Alberta Learning 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 and requires another year of ECS; and
- 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 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 onsite 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* (AR 126/99); and
- 2. Is under the supervision of a **school jurisdiction** or a **funded private school** and living in Alberta on September 30; and

- Is at least 5 years and 6 months or older and eligible to enter grade 1 according 3. 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 s/he is counted; and
- Is a Canadian citizen; or 4.
 - lawfully admitted to Canada for permanent residence:
 - b) a child of a Canadian citizen: or
 - a child of an individual who is lawfully admitted to Canada for permanent or temporary residence; and
- Has a parent who ordinarily resides in Alberta, or is an independent student 5. who ordinarily resides in Alberta; and
 - a) Is not counted by another school jurisdiction or funded 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

New

The primary purpose of a **home visit** is to actively involve parents and/or caregivers Updated/ of a child with a disability/delay, with the child's learning team, in the development and delivery of a comprehensive educational program for the child. Home visits are directed at achieving the educationally relevant goals set out in the IPP. All home visits should be carefully planned and documented. Home visits are delivered by one or more members of the child's learning team which must include a certificated teacher and may also be comprised of paraprofessionals and/or child development specialists such as Speech-Language Pathologist, Occupational Therapist, Physical Therapist, Psychologist, Behaviour Specialist etc. In all cases, these team members must be under the direction of the certificated teacher, and the educationally relevant goals must be outlined in the child's IPP. Note: visits conducted primarily to deliver direct therapies such as speech therapy, occupational therapy, and physical therapy cannot be considered an eligible home visit.

> The frequency, setting and structure of a home visit must be determined in consultation with the parents prior to implementation of the program. Visits with alternate caregivers can be included as a part of the home program with the parent's agreement. Summary reports of visits with alternate caregivers must be shared with the parent either in written or verbal form.

An eligible **home visit** must meet the following program and funding requirements:

- Must be under the supervision of the child's certificated teacher;
- Must involve the child and the parent/guardian or alternate caregiver;
- Must average at least 1.5 hours in length;
- Must support the child's overall educational program (IPP);
- Must be provided on an individual basis
- Must take place in the child's home or alternate setting agreed upon by parents;
- Must be provided outside of the centre-based hours; and
- At least 4 home visits must be provided in order to be counted in the ceiling calculation for Program Unit Funding purposes.

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 least16 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 8(2) of the Child Welfare Act.

INDIVIDUALIZED PROGRAM PLAN (IPP) means a concise plan of action that is designed Revised to address the student's/child's special 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, and the gifted and talented.

The IPPs of students/children with special educational needs will include:

- 1. assessment data;
- 2. current level of performance and achievement;
- 3. identification of strengths and area 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 Welfare 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 Learning 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 within 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. Through hospital admission; or
- 2. Through a court order or agreement under the Child Welfare Act; or
- 3. For protection and/or care by:
 - a) Alberta Children's Services:
 - b) Alberta Health and Wellness; or
 - c) Alberta Solicitor General: or
- 4. As residents of a women's shelter because of a situation where there is need for protection from physical, psychological or sexual abuse.

Funded students in an **institution** must be **resident students of the government** as defined in Section 44 (7) of the *School Act*.

SCHOOL AUTHORITIES APPROVED TO PROVIDE AN EDUCATIONAL PROGRAM IN AN Updated INSTITUTION (School Code)

Battle River RD No. 31

Camrose Women's Shelter (4554)

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

Women's Emergency Shelter

Dr. Gordon Townsend (9886)

William Roper Hull School (9033)

Westview YOC (9687)

Chinook's Edge School Division

Grimmon House (1058)

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 #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 Learning Centre (YAC) (1619)

Lakeland RCSSD No. 150

Dr. Margaret Savage Crisis Centre (2916)

Lethbridge SD No. 51

Pitawani (6456)

Harbour House (6459)

Hospital Program (6453)

Northern Lights SD No. 69

Lac La Biche YAC (2716)

Parkland School Division #70

Bright Bank Academy (2235)

Garden Valley Road School

Peace Wapiti School Div No. 33

Rycroft School (1055)

Clairmont Group Home (1056)

Red Deer School Dist No. 104

Parkland Youth Homes (4464)

Red Deer Hospital Program (0574)

Oskayak Treatment Centre (4469)

Direwood Treatment Centre (4461)

Red Deer Youth Assessment Centre (4457)

Sturgeon SD No. 24

Oak Hill Boys Ranch (2509)

Wetaskiwin Reg. Div. No. 11

Wetaskiwin Plus (A+) Program (3143)

Wild Rose School Division No. 66

Kootenay School (4111)

Wolf Creek RD No. 72

Alberta Hospital Ponoka (4299)

Twin Oaks (1040)

MINISTER means the Minister of Learning.

Revised

- 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 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 in a **school** year during which the **schools** of a **school jurisdiction** are scheduled to be open for classroom instruction.
- **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 private school; that
 - 1. Has been approved by Alberta Learning 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 jurisdiction** that sends the partnered Alberta resident student on the exchange must also receive the partnered student from another province or country either in the same school year or in the subsequent school year.
- **RESIDENT BOARD** means the **board** of 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 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** travelled on a **highway** by a vehicle transporting **eligible passengers** to and from **school**, or on a feeder route, on an **operating day** or by a vehicle transporting **eligible passengers** on a weekend between their places of residence and their boarding places or **schools** where both places are in the same district or **division**.

RURAL DISTRICT means a district or division that is not an urban district.

SCHOOL means a structured learning environment through which an education program is offered to a student by:

- 1. A board:
- 2. An operator of a **private school**;
- 3. An Early Childhood Services (ECS) private operator;
- 4. A **parent** giving a home education program; or
- 5. The **Minister**.

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

SCHOOL AUTHORITIES for the purpose of this manual includes **School Jurisdictions**, **Funded Private Schools**, and **Private ECS Operators**.

SCHOOL BUILDING means a building used for the instruction or accommodation of students that is owned or occupied by a **school jurisdiction**, a **school jurisdiction** and a 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 <u>CSA Standard D 250-M 2001</u> 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.

STUDENTS/FUNDED CHILDREN WITH SEVERE DISABILITIES/DELAY means **funded students** and **funded children** who have been assessed as having a severe disability according to the definitions below:

CATEGORIES AND DEFINITIONS OF SEVERE DISABILITIES FOR ECS TO GR. 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 an educational 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 should 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).

Note: Students/ECS children diagnosed with Fetal Alcohol Spectrum Disorder (FASD) in the most severe cases should be reported under Code 44 rather than Code 42.

SEVERE MULTIPLE DISABILITY (Code 43)

A **funded student/funded child** with multiple disabilities is one who:

- a) has two or more non-associated moderate to severe cognitive and/or physical disabilities which, in combination, result in the student functioning at a severe to profound level; and
- b) requires significant special programs, resources and/or therapeutic services.

Students/ECS children with a severe disability and another associated disability should be identified under the category of the primary severe disability. For example:

- A student/ECS child with a severe cognitive disability and another associated disability is not designated under this category, but is designated under severe cognitive disability.
- A student/ECS child with a severe emotional/behavioural disability and another associated disability is not designated under this category, but is designated under severe emotional/ behavioural disability.

The following mild or moderate disabilities cannot be used in combination with other disabilities to qualify under Code 43:

- a) Attention Deficit / Hyperactivity Disorder (AD/HD) (ECS gr. 12)
- b) Emotional/Behavioural Disabilities (ECS gr. 12)
- c) Learning Disability (LD) (grades 1 12 only)
- **Updated** d) Speech and Language Related Delays (ECS gr.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 learning environment in order to benefit from schooling.

A student/ECS child with severe autism or other severe Pervasive Developmental Disorder is included in this category. A clinical diagnosis by a psychiatrist, chartered psychologist, or medical professional specializing in the field of autism is required. A clinical diagnosis of autism is not necessarily sufficient to qualify under this category. Eligibility is determined by the functioning level of the student/ECS child with autism.

In order for a diagnosis of autism to be made, the student/ECS child needs to demonstrate impairment in the following areas:

- Social interaction; and
- Communication; and
- Stereotyped pattern of behaviour (i.e. hand flapping, body rocking, echolalia, insistence on sameness and resistance to change).

A student/ECS child diagnosed with severe Fetal Alcohol Spectrum Disorder (FASD) may have Fetal Alcohol Syndrome (FAS) or Alcohol-Related Neurodevelopmental Disorder (ARND) and is included in this category (Code 44 – Severe Physical or Medical Disability – Including Autism). A clinical diagnosis by a psychiatrist, chartered psychologist with specialized training, or medical professional specializing in developmental disorders 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:

- **Updated** a) has a hearing loss of 71 decibels (dB) or more 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 modifications 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 Learning, 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 a 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 Learning, 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.

Revised 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 total language. Please use the following criteria for determining 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 a <u>severe</u> phonological delay and <u>at least a moderate</u> expressive, receptive or total language delay (on a formal assessment of language); or
- c) A child who has <u>at least a moderate to severe</u> expressive, receptive or total language delay (on a formal assessment of language) and <u>at least a moderate to severe</u> delay in one or more of the following areas of development: fine motor, gross motor, vision, hearing.

Alberta Learning 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 Code 43.

- **STUDENT WITH A DISABILITY** means a **funded student** who has been assessed and coded as having a mild, moderate or severe disability.
- Revised 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 exceptional 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.
 - **TEMPORARY RESIDENT**, for purposes related to the interpretation of the *School Act*, is defined as a person who:
 - a) has been issued a study permit and is registered in a full-time, full-year program (i.e., a foreign student who is registered full-time in a recognized post-secondary program in Alberta for one year or more); or
 - 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 Minister's Permit; or
 - e) has diplomatic status in Canada.

Temporary residents will not include:

- a) visitors/tourists to Canada, with or without a valid visitor's visa;
- b) individuals in Canada with student authorizations who are not registered in a full-time, full-year program; and
- c) individuals in Canada for three months or less for the purposes of language training.

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 and the **parent** can 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**. Students of **school** age who are in Canada on a study permit are considered Foreign Students and do not qualify for Alberta Learning 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 a Code 41, 42, 43, 44 or 46 student, is multiplied by a factor of 3.0;
 - 4. An aide accompanying a **student/child with a severe disability** is multiplied by a factor of 1.50: and
 - 5. Each eligible passenger who requires a wheelchair is multiplied by 6.0.

RECESSING OR CEASING OF OPERATIONS BY A PRIVATE ECS OPERATOR

POLICY

When funding has been provided by Alberta Learning and the funding has not been used for the purpose for which the grant funds were provided, the surplus money shall be returned to the Provincial Treasurer or provided to another operator of an approved **Early Childhood Services (ECS) program**.

GUIDELINES

- 1. An ECS operator may choose to go into recess for not more than one 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 that is delivering a program in the community is willing to take over the program.
 - If another 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 School Finance, Alberta Learning, with a copy to the appropriate Zone Services Branch.
- 4. If an **ECS** operator does not transfer its assets to another operator, Alberta Learning will determine the amount of surplus from operations to be returned to the Provincial Treasurer. In addition, if a capital grant has been obtained within the final three years of operation, a portion of this grant must be returned.

PROCEDURES

- Sign an agreement/contract for the transfer of the ECS operator's assets and liabilities to another operator. A letter of agreement signed by both parties is sufficient.
- 2. Prepare an Audited Financial Statement (AFS) for the final year of operation or portion thereof and submit this statement to Alberta Learning.
- 3. Prepare an inventory schedule of assets transferred on the date operation ceased and have it signed by officials of the **ECS** operator accepting the transfer.

RECESSING OR CEASING OF OPERATIONS BY A PRIVATE ECS OPERATOR

- 4. Notify Alberta Government Services, Corporate Registry if the society will be dissolved on the specified date.
- 5. In the year an operator decided to cease operations, fees paid by **parents** in that year may be returned to the **parents** from the operating surplus of that year.
- 6. When the ECS operator ceases operation but does not transfer the assets and liabilities to another operator, the final AFS will be reviewed and the accumulated surplus, if any, will be pro-rated by Alberta Learning. The portion of the surplus to be returned to Alberta Learning will be calculated on the ratio of Alberta Learning's contribution to the total revenue of the ECS program over the final three years of operation.
- 7. The disposition of the operating surplus and capital assets not returned to Alberta Learning should be approved at a meeting of the society members of the operator ceasing operations.

GOVERNMENT ORGANIZATION ACT SECTION 13

- 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;

SECTION 13 GOVERNMENT ORGANIZATION ACT

- (I) 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.

APPENDIX 3

WITHDRAWAL OF TEACHER SERVICES OR LOCKOUT

BACKGROUND

Alberta Learning recognizes the desire 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 Learning will adjust funding while keeping the educational needs of the students a priority.

PURPOSE

In the event of a strike by staff or a lockout by a **board** when educational services are not provided, the funding payable to a **board** shall be reduced. Adjustment of funds prevents a financial benefit from accruing to a **board**.

CONDITIONS

- 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 services occurred.
- 2. Funding will be reduced by 1/200th of the certificated teacher salary and benefits amount for each day teachers are on strike.
- 3. The amount of the reduction will be based on the following:
 - a) A 200 day school year where funding is payable based on an annual formula
 - b) The number of **operating days**, (including teaching preparation days and inservice days) for which the strike or lockout occurred. Scheduled holidays, statutory holidays and make-up time for teaching days lost will not be used to reduce the number of **operating days**.
- 4. **Boards** are required to ensure that students in Grades 2 to 9 have access to 950 hours of instruction per year and that students in Grades 10 to 12 have access to 1,000 hours of instruction per year. The access to instruction hours can be met in various ways.
- 5. All other funding to **school jurisdictions** will continue in order to provide **boards** with the flexibility to make local operating decisions.
- 6. There should be sufficient funds and flexibility within a **board's** current funding allocation to cover any cost of providing distance learning materials to students during the cessation. No additional funding will be provided for these costs.
- 7. A **board** shall notify Alberta Learning, immediately following the end of a strike or lockout, of the period and number of days of the cessation of services.

- 8. 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.
- 9. Alberta Learning will provide the **board** with a detailed calculation of the funding reduction.
- 10. After the strike or lockout, the funding reduction amount will be recovered from the next applicable payment(s) to the **board**.
- 11. In the event of a dispute over the amount of the funding reduction, a **board** may submit its concern(s) in writing to the **Minister**.