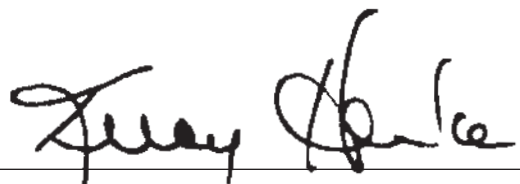


# FUNDING MANUAL FOR SCHOOL AUTHORITIES 2008 – 2009 SCHOOL YEAR

This manual is issued under authority of the following:

- *School Act*, RSA 2000, Section 176
- *Alberta School Foundation Fund Regulation*  
(AR 250/96, amended by AR 166/2001)
- *Government Organization Act*, Section 13
- *Education Grants Regulation*



Deputy Minister of Education



Date



June 11, 2008

Message from the Deputy Minister

I am pleased to provide you with Alberta Education's *Funding Manual for School Authorities* for the 2008-2009 school year.

The *Manual* has been edited and reformatted to provide a more efficient document that will assist school jurisdictions, charter schools, accredited funded private schools and private ECS operators in accessing and understanding Alberta Education funding. The *Manual* provides details on the funding available for the 2008-2009 school year including applicable formulas, rates, criteria and reporting requirements. Funding from Alberta Education supports the provision of approved education programs for students in Grades 1 to 12 and ECS children.

Although the format and 'look' of the *Manual* has been revised, in the Summary of Significant Changes, you will find highlights of the funding changes for 2008-2009. Any questions may be directed to the appropriate contact listed in section 9.

I am also pleased to provide binders for the revised *Funding Manual for School Authorities*. Included in the package is a template for feedback on the new format for the *Manual* which can be forwarded to School Finance Branch.

Please accept my best wishes for a successful school year in 2008-2009.

Sincerely,



Keray Henke  
Deputy Minister



## SUMMARY OF SIGNIFICANT CHANGES

### FUNDING MANUAL FOR SCHOOL AUTHORITIES

#### 2008 – 2009 SCHOOL YEAR

The following information outlines the significant changes to the *2008-2009 Funding Manual for School Authorities*.

The *Funding Manual* has a new look and is a smaller more streamlined document than previous versions. The entire document is now paginated. Some content has been moved to Section 9, including the Reporting Requirements, References, and the Contact List. A significant amount of content that was not funding related has been removed and references to Alberta Education documents that 'house' this information are either itemized in the *Manual* or 'hot linked' in the electronic version. In previous Manuals certain sections from part one were repeated in the Private ECS Operators and Private Schools sections. In the revised 2008-2009 Manual Private ECS Operators and Private Schools are referred to the applicable sections in Part 1. These changes are clearly laid out in the Table of Contents.

The following is a list of significant content changes that have been made to the *2008-2009 Funding Manual for School Authorities*. Some of these changes may not apply to all school authority types.

#### Table of Contents

- One new section has been added: Section 6.6, Fort McMurray Allowance for school jurisdictions in the Fort McMurray area.

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

- Some sections in Part 1 have been re-numbered as a result of the Manual's new format.

#### Section 1.25 – Charter Schools funding

- Allocation Criteria 2 (b) and (c) have been modified so that transportation funding for urban and rural students attending a Charter School is consistent with transportation funding provided for students attending urban and rural school jurisdictions.

#### Section 1.31 – Special Transportation Funding

- Special Transportation funding will be provided for eligible students and ECS children with disabilities/delays who because of their disability are unable to ride on regular transportation provided under sections 1.28, 1.29, and 1.30. The reference to young age is not required.

#### Section 1.32 – ECS Regular Transportation

- Transportation funding for ECS Children with disabilities/delays may only be claimed under Section 1.33 ECS Special Transportation. Parent provided transportation of a child with a disability or delay will continue to be provided under Section 1.32.

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

##### Section 5.6 – Children and Youth with Complex Needs funding

- Funding allocations are Under Review for the 2008-2009 school year.

#### Part 6: Other Provincial Support

##### Section 6.1– Education Programs in Institutions (EPI's) funding

- This funding, currently provided for eligible Resident Students of the Government who reside in Institutions, will also now be provided to eligible students served by an Institution on a day basis. Only EPI's approved to serve "day students" will be eligible for this funding. This funding change is being made to reflect changes that the Alberta Solicitor General and Alberta Health and Wellness have made in serving persons of school age in their Institutions.

**Section 6.2– Regional Educational Consulting Services (RECS) funding**

- The Service Fee charged by RECS teams to school authorities is increased from \$45 to \$50 per hour.
- The requirement that RECS teams provide an audited financial statement of actual costs incurred has changed. The financial statements no longer are required to be audited. This change is made to reduce the amount of administration for RECS teams and to recognize the higher costs of having financial statements audited.

**Section 6.6– Fort McMurray Allowance (FMA) funding**

- This living allowance represents new funding for school jurisdictions in the Fort McMurray area. The FMA is provided to the jurisdiction who then allocate to their eligible employees in the Fort McMurray area.

**Part 8: Payments to School Authorities****Sections 8.1, 8.2, and 8.3 – Funding Rates**

- Alberta Education's funding rates were increased by 4.53% as per the Budget 2008 announcement.

**Glossary of Terms**

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

- Day Students (in Education Programs in Institutions)
- FTE
- FTE Funded Children/Students
- FTE Funded Enrollment
- FTE Weighted Enrollment
- Institutional Students
- School Board (replaces the former term "Board")
- Schools of Choice

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## Foreword

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

## GENERAL CONDITIONS

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

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

5. The reference documents listed in Section 9.4 of this Manual should be used by **school authorities** as companion documents to the *Funding Manual for School Authorities*. They should not be used exclusive of each other.
6. **School authorities** applying for funding shall keep on file, for seven years, the documents required to support their claim for each type of funding described in this Manual, including invoices. The following are examples of other information to be kept on file:
  - a. an eligible enrollment count as of the **count date** for the **school year**;
  - b. copies of current **educational service agreements** including **transportation agreements**;
  - c. a record of the daily attendance of each enrolled student including high school students, the master timetable and student timetables and documents listed in Section 1.2;
  - d. a list of **schools**, teachers and administrators involved in each program.
  - e. documentation supporting a student's eligibility as a **funded student/funded child**.
  - f. where applicable, documentation supporting a student's eligibility for funding as a child of a **temporary resident**
7. Alberta Education reserves the right to request and inspect documentation to substantiate data submitted that determines funding allocations and that assists in conducting financial and other reviews. This document inspection may be conducted off-site or on-site in a **school authority**.
8. Per the *Education Grants Regulation 9(1)*, an adjustment may be made to a payment when a review or audit by Alberta Education indicates that:
  - a. a **school authority** has received funding to which it was not entitled – Note: no limitation period; and
  - b. a **school authority** has not received funding to which it is entitled – Note: the limitation period for school authorities to request an adjustment/change to any funding, shall be three years including the current **school year**.
9. For those **private ECS operators** who are required to complete the Audited Financial Statements or the Budget Report, January and subsequent payments shall be withheld until the documents have been submitted and determined to be acceptable by the Financial Reporting and Accountability Branch.
10. Payments may be withheld from **school jurisdictions** and **accredited funded private schools** if the Audited Financial Statements or the Budget Report, or the **School board** Three-Year Education Plan or the Annual Education Results Report (AERR), or any other information requested or required by the **Minister**, have not been properly completed in accordance with the respective Guidelines and submitted by the due date. When the documents have been submitted and determined to be acceptable, payments will be released.
11. **ECS operators** who have received funding from Alberta Education to provide an **ECS program** and have decided to cease operation may be required to return a portion of their accumulated operating surplus to the Minister of Finance (see Section 9.5).
12. The **Minister** may fund a **school jurisdiction**, other person, or organization for purposes related to the education of **children in early childhood services programs**, or students in **school** programs that are in addition to the funding provisions of this Manual.
13. A budgeted annual operating deficit for an upcoming **school year** is acceptable if, and only if, sufficient accumulated operating surplus (AOS) funds are available to cover the planned shortfall without impairing the long-term financial health of the **school jurisdiction**. A **school jurisdiction** failing to submit an acceptable budget will be expected to work with Alberta Education to achieve expected financial results, and may be subject to an inquiry under Section 41 of the *School Act* and to the appointment of an official trustee under Section 42 to conduct the affairs of the **school jurisdiction**.

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

## LIMITATIONS

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

1. The maximum expenditure for system administration and **school board** governance will range from 4.0 and 6.0% depending on the student enrollment of the **school jurisdiction**. To determine the maximum expenditure the applicable percentage is applied to a **school jurisdiction's** total expenditures as outlined in the Guidelines published by the Financial Reporting and Accountability Branch.
2. Funding provided to support ECS to Grade 12 programs cannot be used to support courses, programs or training for adults (20 years and older).
3. Targeted Funding for Provincial Initiatives is allocated for specific priority programs as determined by Alberta Education, and are included in Part 5 of this manual.
4. Funding for capital needs is allocated to **school jurisdictions** based on priorities and formulas determined by Alberta Education. For the 2008 – 2009 **school year**, funding is provided for the areas of School Facilities and Infrastructure Maintenance and Renewal. Funding for these areas cannot be used for purposes other than capital needs.
5. Given the nature of the following funding areas, it is not possible to utilize the funding for purposes other than that for which it was provided: Francophone Education Funding, French Language Funding, Educational Programs in **Institutions** Funding, Regional Educational Consulting Services Funding, Program Unit Funding, Learning Resources Credit Allocation, Regional Consortium Funding, and Debt Retirement.

## ALLOCATION CATEGORIES

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

1. Base Instruction Funding
  - is provided on a per student basis for every full-time equivalent (**FTE**) student from Early Childhood Services (ECS) to Grade 9. For students in Grades 10 – 12, Base Instruction funding is provided based on Credit Enrollment Units (**CEUs**).
2. Additional Funding for Differential Factors
  - is based on distribution formulas designed to address variable cost factors.
  - specific identified student populations include:
    - Early Childhood Services children with mild/moderate disabilities and those who are gifted and talented;
    - **Children/Students with severe disabilities/Delay**;
    - English as a Second Language/**Francisation** students;
    - First Nations, Métis, and Inuit students;

- The percentage of the student population of a **school jurisdiction** experiencing low Socio-Economic Status (SES).
- Funding for **students with severe disabilities** is based on a funding profile for each **school jurisdiction**.
- SES is calculated on the general student population of the **school jurisdiction** and an incidence rate relative to the **school jurisdiction**. It is derived from census data provided by Statistics Canada.
- The distribution formulas are also designed to address variable cost factors, such as:
  - small schools by necessity;
  - geographical **distance** between **school jurisdiction** central office and schools;
  - year to year enrollment fluctuations;
  - administration costs for **school jurisdictions** with small enrollments;
  - increased costs for **schools** located in the north;
  - cost differences among **school jurisdictions** for purchasing of local goods and services;
  - variable cost of transporting students in rural, urban and metro **school jurisdictions**;
  - support for daily physical activity in Grades 1 – 9 schools;
  - support for Hutterite colony schools;
  - support for francophone students to have equivalent access to programs.
- 3. Targeted Funding for Provincial Initiatives
  - must be used for the purpose it was allocated, such as Student Health Partnerships, Alberta Initiative for School Improvement, and Class Size Initiative.
- 4. Other Provincial Support
  - is provided in addition to the funding identified above and covers such areas as Regional Educational Consulting Services, Institutional Programs, The Learning Resources Credit Allocation, Regional Consortium, Debt Retirement and the Fort McMurray Allowance.
- 5. Capital Funding
  - is provided for preservation of a current school facility, or construction of a new school facility. This funding may only be used for the purpose it was intended.

## REVENUE SOURCES FOR SCHOOL JURISDICTION FUNDING

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

1. The Alberta School Foundation Fund (ASFF) provides payments on an equal amount per **eligible student**\*
  - For the purpose of the ASFF the term “**school boards**” does not include Francophone Regional Authorities, **charter schools**, **accredited funded private schools** or **private ECS operators**.
  - The equal amount per **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.

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

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

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

## Payment from ASFF

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

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

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

## MANUAL FORMAT

A list of major changes is provided in the accompanying document: *Summary of Significant Changes for 2008 – 2009*.

The format for sections 1-7 of the Manual describes the funding that is available to **school authorities** and **private ECS operators** as follows:

**ALLOCATION FORMULA:** where applicable this section identifies the specific formula used to calculate the amount of funds that will be allocated to **school authorities**.

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

## Other Sections of the Manual Include:

### Payments to School Authorities

This section identifies funding rate and payment schedules.

### Additional Information, Reporting Requirements

The following information is included in this section

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

### Glossary of Terms

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



# PART I — FUNDING<sup>1</sup> FOR SCHOOL JURISDICTIONS, FRANCOPHONE REGIONAL AUTHORITIES, AND CHARTER SCHOOLS

## A. BASE ALLOCATIONS

### SECTION 1.1 — ECS Base Instruction

#### ALLOCATION FORMULA

$$\text{ECS Base Instruction Allocation} = \text{\# of funded children} \times \text{Applicable ECS Base Instruction Rate (see Section 8.1 or Section 8.2)}$$

#### ALLOCATION CRITERIA

- Access to at least 475 hours of ECS instruction must be provided.  
Exceptions:
  - ECS mild/moderate, gifted or talented see section 1.5
  - Children with severe special needs see section 1.6
- A child referred to in Section 30(1)(a) of the *School Act* is not a resident or non-resident student of a **board**, therefore, an approved **ECS operator** must be prepared to accept and organize programming for all **funded children** for whom programming is requested, including **children with special needs**.
- A **funded child** can only be claimed for funding by one **ECS operator** per year.
- ECS operators** are eligible for one year of ECS Base Instruction funding for regular ECS **funded children**, who are at least 4 years 6 months of age and less than 6 years of age on September 1.
- When a **funded child** (not a child with special education needs) lives in a remote area and where there is no ECS program offered in a **school** within a reasonable transportation **distance**, the **school jurisdiction** may provide an **ECS home program**.
- ECS operators** may only charge a fee to **parents** of **funded children** in a basic 475-hour program to offset non-instructional costs such as supplies, snacks and field trips.
- ECS operators** that offer an **ECS program** with more than 475 hours may charge a reasonable fee to cover the cost of the additional instructional hours.
- An individual who is at least 5 years 6 months but less than 6 years of age on September 1, and who is either coded severe or mild/moderate, may be counted as a **funded child** (rather than as a **funded student**) if the **school jurisdiction**, the **ECS operator** and the parent agree that an **ECS program** is the most appropriate program, and the child has spent less than the number of years in the program for which they are eligible.

<sup>1</sup>Accredited Funded Private Schools and Private ECS Operators as applicable.

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

## FEES AND DEDUCTIONS

### Portable Classroom Rental Fee:

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

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

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

## REFERENCES

Alberta Regulation 31/2002 School Act – Early Childhood Services Regulation

Early Childhood Services Policy 1.1.3

Kindergarten Program Statement Revised September 2005

Program Unit Funding: A Handbook for ECS Operators

## SECTION 1.2 — Base Instruction (Grades 1 – 12)

### ALLOCATION FORMULA

Base Instruction:

- Grades 1 – 9

# of funded students in Gr. 1 – 9

X

Applicable Base Instruction Rate  
(see Section 8.1 or Section 8.3)

- Grades 10 – 12

a) # of CEUs completed by funded students (max. 60 per year)

X

CEU Rate

b) # of students with special education needs  
(Grant code 500 or 550)

X

35 CEUs

X

CEU Rate

### ALLOCATION CRITERIA

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

### 8. Funding for Eligible Students in Grades 10 to 12

- a) funding is provided on a **credit enrollment unit (CEU)** basis for senior high school courses as follows:
  - Credit Value 1 = 1 **CEU**,
  - Credit Value 3 = 2.5 **CEUs**,
  - Credit Value 5 = 5 **CEUs**
- b) funding is provided for senior high school courses completed during weekends (Saturday and Sunday), statutory holidays, evenings (after 6:00 p.m.), and during the summer break, if instruction is provided for a minimum of:
  - 80 hours for a five credit course; or
  - 48 hours for a three credit course;

(Registered Apprenticeship Program, and Special Projects courses are exceptions to these rules – see the Guide to Education for more details)
- c) funding is provided to a maximum of 60 **CEU**'s per student per year (September –August)
- d) funding is provided for Alberta **Distance Learning (ADL)** courses paid by a **school authority** for students whose marks are reported by the ADLC;
- e) funding is provided for off Campus Education Programs, and other credit courses involving substantial off-campus instruction;
- f) Knowledge and Employability (K&E) course credits completed and credits completed for any remaining Integrated Occupational (IO) courses will be funded at 8/5 times the **CEU** rate;
- g) students registered on the **count date** and enrolled in at least one of the following ESL courses: ESL 1120, 1121, 1122, 1123 or 1125, will be funded at the rate of 17.5 **CEUs** per student per semester of ESL courses taken. No additional funding is provided for other courses completed during these semesters. Students taking ESL courses or non-ESL courses during the summer **term** will be funded on a **CEU** basis;
- h) funding is provided for credits granted through **challenge assessments** at 20% of the **CEU** value for the course(s) challenged. Funding will not be provided for challenge assessments and course completion for the same subject in the same semester;
- i) funding based on 35 **CEUs** is provided for **high school refugee students** (code 640) who have one of the following documents on file from Citizenship and Immigration Canada:
  - Notice to Appear
  - Refugee Protection Claimant Document
  - Notice of Decision
  - Immigration Visa and Record of Landing indicating status as Convention Refugee
  - Confirmation of Permanent Resident indicating status as Convention Refugee

**High school refugee students** enrolled in Home Education programs, **Blended programs**, **Outreach programs** or **On-Line programs** are not eligible for this funding.
- j) when a student transfers from one high school to a high school in another **school authority** during a **term** in which a course is offered, the **school authority** that provided the majority of instructional minutes will receive the funding from Alberta Education;
- k) funding is provided for Alberta **funded students** enrolled with a Lloydminster school **division** high school on the **count date**
- l) Funding is provided for senior high school students who take a junior high course for 125 hours; the equivalent of 5 **CEUs** will be funded for each course completed (Form08AE1.2a)
- m) Additional funding will be provided for credits completed in the summer for high school students identified with the 500 grants code.

**9. Criteria for Funding High School Courses:**

- a) High school courses delivered to students and claimed for funding must meet the conditions in this Funding Manual, the Guide to Education: ECS to Grade 12 and all other Alberta Education legislation, regulations and policies.
- b) a regular course (non-Career Technology Studies) submitted as complete (COM) or withdrawn (WDR) is considered completed for funding purposes when:
  - i) a student has earned a final mark of 50% or greater in the course; or
  - ii) a student has earned a final mark of 25% or greater but less than 50% in the course, and has attended at least 50% of the classes in the course or has worked on and been assessed on at least 50% of the course content.

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

- iii) For diploma examination courses (i) and (ii) only applies to the school-awarded portion of the mark.
- c) One credit CTS course submitted as completed (COM), incomplete (INC) or withdrawn (WDR) is considered completed for funding purposes when a student has worked on and been assessed on at least 50% of the course content.
- d) for regular courses submitted as complete (COM) or withdrawn (WDR) and delivered to students on-line or by **distance** learning the attendance funding criteria may not apply (refer to 9.b).
- e) for all regular and CTS courses, **schools** must maintain course outlines, detailed assessment records of student work in the course, records of student withdrawal, and final marks. Attendance records must also be maintained for non CTS courses.
- f) funding will not be provided for a CTS course if the prerequisite(s) was not completed/ waived in the same term or a prior term.
- g) Students are not restricted in the number of credits they can take in a **school year**.

**10. Course Completion Status Codes:**

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

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

**11. CEU Funding Recovery Schedule**

- a) A 10% funding recovery will be applied for the following Access to Instructional Hours violations:
  - i) Courses where access to instruction is found to be less than 25 hours per high school credit (20.8 hours per credit for a 3 credit course).
  - ii) When a school timetables several high school courses in the same block and the access to instruction for courses offered is found to be less than 25 hours per credit.

- iii) Courses/classes with unreasonably high enrollments where it is determined that it is not reasonable or even possible for a large number of students to have access to 25 hours of instruction per credit.
  - iv) Where a high school student does not have access to at least 1000 hours of instruction.
- b) A 100% funding recovery will be applied when:
  - i) Courses taught did not follow the Program of Studies.
  - ii) A school that has been assessed a penalty previously, continues to be non-compliant.
  - iii) Courses have both access to instruction and Program of Studies contraventions.
- c) A 75% funding recovery will be applied when:
  - Special Projects do not meet the programming requirements set out in the Guide to Education.

## FEES AND DEDUCTIONS

### 1. *Access Copyright (formerly Cancopy):*

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

### 2. *EduLink:*

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

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

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

### 3. *Alberta School Boards Association (ASBA):*

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

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

## Reference

Guide to Education — ECS to Grade 12 (2008).

## SECTION 1.3 — Outreach

### ALLOCATION FORMULA

$$\text{Outreach Allocation} = \frac{\text{Number of Approved Outreach programs in the school jurisdiction}}{\text{Outreach Funding rate}} \times$$

### ALLOCATION CRITERIA

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

### REFERENCES

Alberta Education Programs of Study

Guide to Education ECS to Grade 12 (2008)

**Outreach Programs Handbook** (2003)

## SECTION 1.4 — Home Education

UPDATED

### ALLOCATION FORMULA

1. **Home Education**

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

**PLUS,**

- a) For Grade 7 – 12

50% of ADL courses to a maximum equivalent of Home Education Rate.

- b) For Grade 1 – 6

The ADL course cost that exceed the 50% of the Home Education Rate that the **associate board** or **associate accredited funded private school** provides to the home education **parents**.



2. **Blended Program** Grades 1 – 9

$$\text{Blended Program Allocation for each Funded Student} = \left( \text{Percentage of the Home Education Program} \times \text{Home Education Rate} \right)$$

**PLUS:**

$$\text{The percentage of the School Program (minimum 50\%)} \times \text{Base Instruction Rate}$$

**PLUS:****UPDATED**

The ADL course costs that exceed 50% of the Home Education rate the **associate board** or **associate accredited private school** provides to the home education **parents** (Up to a maximum of the student's pro-rated Home Education funding amount).

3. **Blended Program** Grades 10 – 12

$$\text{Blended Program Allocation for each Funded Student} = \left( \text{Percentage of the Home Education Program} \times \text{Home Education Rate} \right)$$

**PLUS**, the lesser of:

$$\text{a) } \text{The percentage of the School Program (minimum 20\%)} \times \text{Base Instruction Rate}$$

or

$$\text{b) } \text{CEUs earned} \times \text{the CEU rate (for students taking high school courses)}$$

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

**ALLOCATION CRITERIA**

1. The education programs for these students must be consistent with the student learning outcomes described in the Alberta Programs of Study or stated in the schedule attached to the *Home Education Regulation*, and be supervised by an **associate board** or **associate accredited private school**.
2. An **associate board** or **associate accredited private school** must offer to the **parent** of a **home education student** not less than 50% of the Home Education instruction funding for the purchase of instructional materials.
3. For a **home education student** enrolled by the **associate board** or **associate accredited private school** in ADL courses at the ADLC at the **parents'** direction, the **school board** may use some or all of the **parent's** 50% funding to pay for the cost of these courses and required instructional materials. The **associate board** or **associate accredited private school** may claim costs for ADL courses that exceed the **parent's** 50% funding.
4. For **home education students** in Grades 7 to 12 enrolled by the **associate board** or **associate accredited private school** in Alberta **Distance Learning (ADL)** courses at the Alberta **Distance Learning Centre (ADLC)**, the funding provides for 50% of the cost of the ADLC course costs to a maximum equivalent of the Home Education instructional funding amount. This funding may be claimed on Form 08AE1.4a.
5. When a **home education student** in grades 7 to 12, who is taking ADL courses through the ADLC, moves from one **associate board** or **associate accredited private school** to another after the **count date**, and the receiving **associate board** or **associate accredited private school** also enrolls the student in ADL courses through the ADLC; Alberta Education will pay 50% of the eligible ADL course costs combined for both **associate boards** –up to a maximum equivalent to the Home Education funding amount.



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

## REFERENCES

Alberta Regulation 145/2006 School Act — Home Education Regulation

Alberta Regulation 145/2006 School Act — Home Education Regulation Section 26, Notification Form

### ***Funding Manual for School Authorities***

- Section 9.1 Information and Reporting Requirements
  - DSEPS

## B. ADDITIONAL ALLOCATIONS FOR DIFFERENTIAL COST FACTORS

### SECTION 1.5 — ECS Mild/Moderate Disabilities, Gifted and Talented Allocation

#### ALLOCATION FORMULA

$$\text{ECS Mild/Moderate and Gifted and Talented Allocation} = \frac{\text{\# of funded children with mild/moderate disabilities/delays or who are gifted and talented}}{\text{Mild/Moderate and Gifted and Talented Rate}} \times$$

#### ALLOCATION CRITERIA

1. **Funded children** must be at least 3 years 6 months of age and less than 6 years of age on September 1.
2. Coding
  - a) Code 30 Mild/Moderate disabilities/delays
  - b) Code 80 gifted and talented
  - c) Grants code 500 must be used with both code 30 and 80
3. **Children with mild/moderate disabilities/delays** or children who are gifted and talented and who are between the ages of 3 years 6 months but less than 4 years 6 months old on September 1, that are reported on the February 27, 2009 count, will be eligible for 50% ECS Mild/Moderate or Gifted and talented funding and 50% ECS Base Instruction funding.
4. The program must meet the requirements set out in Standard for the Provision of Early Childhood Special Education.

#### REFERENCES

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

Early Childhood Services Policy 1.1.3

Guide to Education ECS to Grade 12 (2008)

*Standard for the Provision of Early Childhood Special Education*

### SECTION 1.6 — ECS Program Unit Allocation

#### ALLOCATION FORMULA

1. The funding amount paid will be the lesser of:
  - a) the approved budget amount,
  - b) the program unit ceiling amount, and
  - c) the actual cost

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

i) **Centre-based programming**

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

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

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

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

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

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

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

- c) Calculation of the ceiling amount when a child's program starts after September 30 or ends before May 25 will be the lessor of the following ceiling calculations:
- A pro-rated ceiling based on the number of months of the child's PUF program times \$2,432 per month
  - The ceiling amount based on the centre-based ECS program hours and the number of the **family-oriented programming** sessions provided.
- d) Maximum funding for a program unit is based on 800-hours of **centre-based programming** or 36 **family-oriented programming** sessions or combination thereof.

## ALLOCATION CRITERIA

- Program Unit Funding (PUF) may be paid to a **school authority** for each eligible **child with a severe disability/delay** for a maximum of three years.
- To be eligible for funding, a **child with a severe disability/delay** must be at least 2 years 6 months of age and less than 6 years of age on September 1.
- School authorities** will use the criteria outlined in Special Education Coding Criteria 2008 – 2009 and the corresponding code.
- Eligibility for PUF will be based on all of the following:
  - assessment by qualified personnel of a severe disability/delay
  - documentation that demonstrates the child's current level of functions in the ECS environment
  - a current **Individualized Program Plan (IPP)** which addresses the **funded child's** educational needs; and
  - the **levels of support** and services being provided to the **funded child**.

5. Payment is based on approval of a PUF application.
6. **Designated Special Education ECS programs must:**
  - a) comply with all Allocation criteria as outlined in this Section.
  - b) deadline for PUF application changes is April 1.
7. Alberta Education will apply all applicable revenues to the total program costs (such as ECS Base Instruction funding, mild/moderate funding, ECS transportation funding and other applicable revenues) to determine a net program cost total to which the program unit funding will apply.
8. A **child with a severe disability/delay** who:
  - a) is at least 5 years 6 months but less than 6 years of age on September 1 of the **school year** in which s/he is counted; and
  - b) is eligible to enter Grade 1 under the **school** entrance age policy of the **school jurisdiction**; and
  - c) has not spent 3 years in an **ECS program**,  
may be eligible for PUF if, in the opinion of the **school authority** and the **parent**, an **ECS program** is the most appropriate program for the PUF child.
9. A **funded child** receiving PUF is not eligible for ECS mild/moderate funding.

## REFERENCES

ECS Special Education Handbook

Special Education Coding Criteria — 2008/2009

## SECTION 1.7 — Severe Disabilities Profile (under review)

### ALLOCATION FORMULA

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

### ALLOCATION CRITERIA

1. Funding for **severe disabilities** will be based on the jurisdiction's profile number but all of the following requirements must to be maintained and implemented at the **school** level:
  - a) assessment and diagnosis by qualified personnel;
  - b) documentation/assessments of the student's current level of functioning in the learning environment;
  - c) **students with severe disabilities** must receive three or more of the **levels of support** identified to meet their educational needs.
  - d) a current **Individualized Program Plan (IPP)** based on the Standard for Special Education, amended June 2004, which addresses the student's diagnosed needs
2. **School jurisdictions** will use the severe disabilities categories and codes as outlined in the definition of **students with severe disabilities** in the *Special Education Coding Criteria 2007/2008* and the *Handbook for the Identification and Review of Students with Severe Disabilities* to determine a student's eligibility and to properly code the student for funding purposes.

3. **School jurisdictions** are not required to transfer funds if a student with severe disabilities moves after the **count date** to another **school jurisdiction**, an **accredited funded private school** including DSEPS, or a **charter school**.
4. A **school jurisdiction** that directs a **student with a severe disability** under an **educational services agreement** to another **school authority** is responsible for all educational program costs that are not covered by funding provided by Alberta Education to the **school authority** providing the student's program.
5. Funding is provided to **charter schools** based on the eligibility of a **student with a severe disability**. **Charter schools** that claim funding for **students with severe disabilities** must comply with the conditions and requirements outlined in #1 above.
6. **School jurisdictions** may request an audit of their severe disabilities profile if there are significant increases or decreases to the number of **students with a severe disability** by writing the Director, Special Programs Branch by October 31.
7. For **students with severe disabilities** in a **charter school**, who transfer after the **count date** to an **accredited-funded private school** (or vice versa), severe disabilities funding must be transferred by the **charter school** to the **accredited-funded private school** (or vice versa) on a pro-rated basis, based on a 10 month program year.

UPDATED

## REFERENCES

Handbook for the Identification and Review of **Students with Severe Disabilities** 2007 – 2008  
Special Education Coding Criteria 2007/2008  
Standards for Special Education, Amended June 2004

## SECTION 1.8 — English as a Second Language

### ALLOCATION FORMULA

$$\text{ESL Allocation} = \text{\# of Eligible FTE funded children/students} \times \text{ESL Rate}$$

### ALLOCATION CRITERIA

1. Annual assessments must support insufficient fluency in English to achieve grade level expectations in English Language Arts and other subject areas.
2. **Funded children/students** eligible for ESL funding must be coded either
  - a) Foreign born code 301 or
  - b) Canadian born code 303
3. Two enrollment counts are taken for ESL funding for eligible **funded children/students**
  - a) the **count date**
  - b) on February 27, 2009.

Each count will be used for funding 50% of the **school year**, unless the February 27, 2009 count of ESL students is lower than the count on the **count date**, then the count on the **count date** will be used for the entire **school year**.
4. ESL **funded children** between the ages of 3 years 6 months and 4 years 6 months on September 1 that are reported on the February 27, 2009 count will be eligible for 50% ECS ESL Funding and 50% of the ECS Base Instruction funding

UPDATED

5. Funding is provided for a maximum of 7 years for eligible ESL **funded children/students**.
6. **Funded students** enrolled in **Home education, blended programs, outreach programs** or **on-line programs** are not eligible for funding under this section.

UPDATED

## SECTION 1.9 — Francisation (Francophone Regional Authorities only)

### ALLOCATION FORMULA

$$\text{Francisation Allocation} = \frac{\# \text{ of Eligible Francisation FTE funded children/students}}{\text{Francisation Rate}}$$

### ALLOCATION CRITERIA

1. **Francisation** funding may be claimed for **funded children/students** who have insufficient fluency in French to achieve grade level expectations in Français and other subject areas which must be supported by an annual assessment. Assessment documentation must be kept on file at the **school** and made available upon request.
2. **Funded children/students** eligible for **Francisation** must be coded either:
  - a) Foreign born – code 307
  - b) Canadian born – code 306
3. Two enrollment counts are taken for **Francisation** funding:
  - a) the **count date**
  - b) February 27, 2009

Each count will be used for funding 50% of the **school year**, except, if the February 27, 2009 count of **Francisation** students is lower than the count on the **count date** then the count on the **count date** will be used for the entire **school year**.
4. **Francisation funded children** who are between the ages of 3 years 6 months to less than 4 years 6 months old on September 1, that are reported on the March 3 count, will be eligible for both 50% ECS **Francisation** funding and 50% ECS base Instruction funding.
5. Funding will be provided for a maximum of 7 years for each eligible **funded child/student**.
6. **Funded students** enrolled in Home education, **blended programs, outreach programs** or **on-line programs** are not counted for funding under this section.
7. Francophone Regional Authorities may claim **Francisation** and ESL funding for the same child/student.

## SECTION 1.10 — Enhanced ESL/Francisation

### ALLOCATION FORMULA

$$\text{Enhanced ESL/ Francisation for Immigrant Students Allocation} = \left( \frac{\# \text{ of eligible ESL FTE funded children/students: Foreign-born}}{\text{or}} \frac{\# \text{ of eligible Francisation FTE funded children/students: Foreign-born}}{\right) \times \text{Enhanced ESL/ Francisation Rate}$$

## ALLOCATION CRITERIA

1. This funding is for **funded children/students** who are functionally illiterate in their language of origin, have little or no exposure to English or French or formal schooling, have significant challenges to successful enculturation and have been exposed to traumatic events in their country arising from political or civil unrest.
2. Funding is based on the **FTE funded enrollment** counts determined under Sections 1.8 and 1.23:
  - a) Code 301: ESL Foreign-born
  - b) Code 307: **Francisation** Foreign-born
3. Two enrollment counts are taken for ESL funding for eligible **funded children/students**
  - a) the **count date**
  - b) on February 27, 2009.

Each count will be used for funding 50% of the **school year**, unless the February 27, 2009 count of ESL students is lower than the count on the **count date**, then the count on the **count date** will be used for the entire **school year**.
4. This funding is now available for **funded children** starting at age 3 years 6 months as of September 1 of the current **school year**. Foreign born ESL **funded children** between the ages of 3 years 6 months and less than 4 years 6 months on September 1, that are reported on the February 27, 2009 count, will be eligible for 50% Enhanced ESL funding, or 50% enhanced **Francisation** funding and 50% ECS Base Instruction funding.
5. **Francophone Regional Authorities** can claim both Enhanced **Francisation** funding and Enhanced ESL funding for the same child/student.

## SECTION 1.11 — First Nations, Métis and Inuit Education Allocation

### ALLOCATION FORMULA

$$\text{First Nations, Métis and Inuit (FNMI) Education Allocation} = \# \text{ FTE FNMI children/students} \times \text{FNMI Rate}$$

### ALLOCATION CRITERIA

1. Funding is provided to a **school jurisdiction** or a level 2\* **accredited funded private school** based on the number of self-identified funded FNMI **FTE children/students**.
2. The following types of self-identified FNMI students/children who reside off reserve are funded by Alberta Education and should be coded as follows:
  - Code 331 Aboriginal Learner – Status Indian/First Nations
  - Code 332 Aboriginal Learner – Non Status Indian/First Nations
  - Code 333 Aboriginal Learner – Métis
  - Code 334 Aboriginal Learner – Inuit

These students/children are self-identified and a signed declaration is required on the school registration form.
3. **First Nations students who reside on a reserve** and who attend an Alberta school off reserve, are funded by the Government of Canada and do not qualify for funding under this section.

UPDATED

These students should be coded 330 for funding purposes. In addition to the 330 code, they should also be coded as 331 if they choose to self-identify for data collection purposes under the Aboriginal Learner Data Collection Initiative (ALDCI). Therefore, both codes may be entered for these students and the 330 code will over-ride the 331 for funding purposes.

## REFERENCES

Aboriginal Learner Data Collection Initiative  
Guide to **School board** Planning and Results Reporting (2004)  
The First Nations, Métis and Inuit Education Policy Framework

NEW

\*as per Accountability and Declaration Form 08AE3.0

## SECTION 1.12 — Daily Physical Activity

### ALLOCATION FORMULA

DPA Allocation = # of Eligible Grade 1 – 9 **schools** X DPA Rate

### ALLOCATION CRITERIA

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

## SECTION 1.13 — Socio-Economic Status (SES) Allocation

### ALLOCATION FORMULA

SES Allocation = Incidence Rate X FTE funded enrollment X SES Rate

### ALLOCATION FORMULA

1. The Incidence Rate for a **school jurisdiction** is determined by School Finance using the following four indicators. The first three are provided by Statistics Canada and the last one by Alberta Education:
  - a) percent of families living below the Low Income Cutoff (LICO),
  - b) average number of years of education of mothers,
  - c) percent of families headed by a lone **parent**, and
  - d) transience rate, based on a student mobility rate.
2. The incidence rate for a **charter school** will be determined by taking the average of the incidence rates of the public and separate **school jurisdictions** in which the **charter school** is located – except in cases where the **school's** population clearly has a different SES incidence rate from the average, e.g. Boyle Street.



3. 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.
4. Students enrolled in home education are not counted for funding under this section.

## SOCIO-ECONOMIC STATUS INCIDENCE RATES

School Jurisdictions	SES Incidence Rates rounded to 3 decimals (as used in SAFRS/ original Profiles)
Almadina School Society	0.500
Aspen View Regional <b>Division</b> No. 19	0.207
Aurora School Ltd.	0.253
Battle River Regional <b>Division</b> No. 31	0.180
Black Gold Regional <b>Division</b> No. 18	0.176
Boyle Street Education Centre	1.000
Buffalo Trail Public Schools Regional <b>Division</b> No. 28	0.171
Calgary Arts Academy Society	0.216
Calgary Girls' School Society	0.216
Calgary Roman Catholic Separate School District No. 1	0.206
Calgary School District No. 19	0.225
Calgary Science School Society	0.216
Canadian Rockies Regional <b>Division</b> No. 12	0.128
CAPE – Centre for Academic and Personal Excellence Institute	0.230
Chinook's Edge School <b>Division</b> No. 73	0.188
Christ the Redeemer Catholic Separate Regional <b>Division</b> No. 3	0.186
Clearview School <b>Division</b> No. 71	0.165
East Central Alberta Catholic Separate Schools Regional <b>Division</b> No. 16	0.190
East Central Francophone Education Region No. 3	0.190
Edmonton Catholic Separate School District No. 7	0.242
Edmonton School District No.7	0.263
Elk Island Catholic Separate Regional <b>Division</b> No. 41	0.143
Elk Island Public Schools Regional <b>Division</b> No. 14	0.162
Evergreen Catholic Separate Regional <b>Division</b> No. 2	0.151
Foothills School <b>Division</b> No. 38	0.159
Fort McMurray School District No. 2833	0.211
Fort McMurray Roman Catholic Separate School District No. 32	0.203
Fort Vermilion School <b>Division</b> No. 52	0.228
Foundations for the Future Charter Academy <b>Charter School</b> Society	0.216
Golden Hills School <b>Division</b> No. 75	0.192
Grande Prairie Roman Catholic Separate School District No. 28	0.175
Grande Prairie School District No. 2357	0.224

<b>School Jurisdictions</b>	<b>SES Incidence Rates rounded to 3 decimals (as used in SAFRS/ original Profiles)</b>
Grande Yellowhead Regional <b>Division</b> No. 35	0.196
Grasslands Regional <b>Division</b> No. 6	0.178
Greater North Central Francophone Education Region No. 2	0.215
Greater Southern Public Francophone Education Region No. 4	0.200
Greater Southern Separate Catholic Francophone Education Region No. 4	0.200
Greater St. Albert Catholic Regional <b>Division</b> No. 29	0.163
High Prairie School <b>Division</b> No. 48	0.245
Holy Family Catholic Regional <b>Division</b> No. 37	0.229
Holy Spirit Roman Catholic Separate Regional <b>Division</b> No. 4	0.205
Horizon School <b>Division</b> No. 67	0.191
Lakeland Roman Catholic Separate School District No. 150	0.203
Lethbridge School District No. 51	0.236
Living Waters Catholic Regional <b>Division</b> No. 42	0.197
Livingstone Range School <b>Division</b> No. 68	0.195
Lloydminster Public School <b>Division</b>	0.200
Lloydminster Roman Catholic Separate School <b>Division</b>	0.200
Medicine Hat Catholic Separate Regional <b>Division</b> No. 20	0.215
Medicine Hat School District No. 76	0.245
Mother Earth's Children's <b>Charter School</b> Society	0.188
New Horizons <b>Charter School</b> Society	0.253
Northern Gateway Regional <b>Division</b> No. 10	0.214
Northern Lights School <b>Division</b> No. 69	0.212
Northland School <b>Division</b> No. 61	0.355
Northwest Francophone Education Region No. 1	0.225
Palliser Regional <b>Division</b> No. 26	0.205
Parkland School <b>Division</b> No. 70	0.188
Peace River School <b>Division</b> No. 10	0.209
Peace Wapiti School <b>Division</b> No. 76	0.185
Pembina Hills Regional <b>Division</b> No. 7	0.199
Prairie Land Regional <b>Division</b> No. 25	0.153
Prairie Rose School <b>Division</b> No. 8	0.175
Red Deer Catholic Regional <b>Division</b> No. 39	0.224
Red Deer School District No. 104	0.260
Rocky View School <b>Division</b> No. 41	0.158
St. Albert Protestant Separate School District No. 6	0.151
St. Paul Education Regional <b>Division</b> No. 1	0.246
St. Thomas Aquinas Roman Catholic Separate Regional <b>Division</b> No. 38	0.215

School Jurisdictions	SES Incidence Rates rounded to 3 decimals (as used in SAFRS/ original Profiles)
Sturgeon School <b>Division</b> No. 24	0.173
Suzuki <b>Charter School</b> Society	0.253
Westmount <b>Charter School</b> Society	0.216
Westwind School <b>Division</b> No. 74	0.178
Wetaskiwin Regional <b>Division</b> No. 11	0.234
Wild Rose School <b>Division</b> No. 66	0.196
Wolf Creek School <b>Division</b> No. 72	0.193

## SECTION 1.14 — Relative Cost of Purchasing Allocation

### ALLOCATION FORMULA

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

Where

a = 20% x **School jurisdiction** funding (with exclusions listed below)

b = 47% x Transportation and Boarding funding

c = 75% x Plant Operations and Maintenance funding

d = RCPA Adjustment factor (minimum value 1.0)

### ALLOCATION CRITERIA

- Exclusions;  
Provincial Priority Targeted funding (Part 5 of the Manual) Stabilization, Transportation, Boarding, Plant Operations and Maintenance, Fuel Price Contingency, and Capital funding.
- The Jurisdiction RCPA Index number is based on the spatial price index developed by Alberta Economic Development, which will be reviewed and adjusted regularly. The RCPA Adjustment Factor is determined by taking the Jurisdiction RCPA Index number as indicated in the table below and subtracting 1.0
- The index will have a minimum value of 1.0 for all **school jurisdictions** to ensure that a **school jurisdiction** will not lose funding under the RCPA formula.
- The **school jurisdictions** in the City of Red Deer will have a constant index value of 1.0, with the city of Red Deer considered the bench mark centre.

Jurisdiction Name	Jurisdiction RCPA Index
Almadina School Society	1.058
Aspen View Regional Division No. 19	1.028
Aurora School Ltd.	1.035

<b>Jurisdiction Name</b>	<b>Jurisdiction RCPA Index</b>
Battle River Regional Division No. 31	1.011
Black Gold Regional Division No. 18	1.019
Boyle Street Education Centre	1.035
Buffalo Trail Public Schools Regional Division No. 28	1.005
Calgary Arts Academy Society	1.058
Calgary Girls' School Society	1.058
Calgary Roman Catholic Separate School District No. 1	1.058
Calgary School District No. 19	1.058
Calgary Science School Society	1.058
Canadian Rockies Regional Division No. 12	1.204
CAPE - Centre for Academic and Personal Excellence Institute	1.011
Chinook's Edge School Division No. 73	1.000
Christ the Redeemer Catholic Separate Regional Division No. 3	1.040
Clearview School Division No. 71	1.000
East Central Alberta Catholic Separate Schools Regional Division No. 16	1.000
East Central Francophone Education Region No. 3	1.003
Edmonton Catholic Separate School District No. 7	1.035
Edmonton School District No. 7	1.035
Elk Island Catholic Separate Regional Division No. 41	1.028
Elk Island Public Schools Regional Division No. 14	1.032
Evergreen Catholic Separate Regional Division No. 2	1.028
Foothills School Division No. 38	1.029
Fort McMurray Public School District No. 2833	1.198
Fort McMurray Roman Catholic Separate School District No. 32	1.198
Fort Vermilion School Division No. 52	1.069
Foundations for the Future Charter Academy Charter School Society	1.058
Golden Hills School Division No. 75	1.041
Grande Prairie Roman Catholic Separate School District No. 28	1.065
Grande Prairie School District No. 2357	1.066
Grande Yellowhead Regional Division No. 35	1.041
Grasslands Regional Division No. 6	1.016
Greater North Central Francophone Education Region No. 2	1.042
Greater Southern Public Francophone Education Region No. 4	1.043
Greater Southern Separate Catholic Francophone Education Region No. 4	1.068
Greater St. Albert Catholic Regional Division No. 29	1.030
High Prairie School Division No. 48	1.037
Holy Family Catholic Regional Division No. 37	1.044
Holy Spirit Roman Catholic Separate Regional Division No. 4	1.002
Horizon School Division No. 67	1.015

<b>Jurisdiction Name</b>	<b>Jurisdiction RCPA Index</b>
Lakeland Roman Catholic Separate School District No. 150	1.001
Lethbridge School District No. 51	1.000
Living Waters Catholic Regional Division No. 42	1.025
Livingstone Range School Division No. 68	1.008
Lloydminster Public School Division	1.026
Lloydminster Roman Catholic Separate School Division	1.026
Medicine Hat Catholic Separate Regional Division No. 20	1.011
Medicine Hat School District No. 76	1.011
Mother Earth's Children's Charter School Society	1.035
New Horizons Charter School Society	1.035
Northern Gateway Regional Division No. 10	1.020
Northern Lights School Division No. 69	1.012
Northland School Division No. 61	1.060
Northwest Francophone Education Region No. 1	1.039
Palliser Regional Division No. 26	1.004
Parkland School Division No. 70	1.032
Peace River School Division No. 10	1.054
Peace Wapiti School Division No. 76	1.066
Pembina Hills Regional Division No. 7	1.000
Prairie Land Regional Division No. 25	1.010
Prairie Rose School Division No. 8	1.010
Red Deer Catholic Regional Division No. 39	1.002
Red Deer Public School District No. 104	1.000
Rocky View School Division No. 41	1.055
St. Albert Protestant Separate School District No. 6	1.030
St. Paul Education Regional Division No. 1	1.000
St. Thomas Aquinas Roman Catholic Separate Regional Division No. 38	1.015
Sturgeon School Division No. 24	1.030
Suzuki Charter School Society	1.035
Westmount Charter School Society	1.058
Westwind School Division No. 74	1.001
Wetaskiwin Regional Division No. 11	1.011
Wild Rose School Division No. 66	1.013
Wolf Creek School Division No. 72	1.001

## SECTION 1.15 — Northern Allowance

### ALLOCATION FORMULA

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

### ALLOCATION CRITERIA

UPDATED

1. Northern allowance funding is provided to eligible **school jurisdictions** and eligible level 2\* **accredited funded private schools** based on the **FTE funded enrollment** of all **schools** located in their respective zones.
2. Zones are described as follows:
  - a) Lower Zone – **schools** located between the 55<sup>th</sup> and 56<sup>th</sup> parallels of latitude.
  - b) Intermediate Zone – **schools** located between the 56<sup>th</sup> and 57<sup>th</sup> parallels.
  - c) Upper Zone – **schools** located north of the 57<sup>th</sup> parallel of latitude.
3. The zone in which a **school** is located is determined from the legal land description of the physical location of the **school**.
4. Students enrolled in Home Education, **Online programs** and Hutterite Colony schools are not eligible for funding under this section.

\*as per Accountability and Declaration Form 08AE3.0

## SECTION 1.16 — Intra Jurisdiction

### ALLOCATION FORMULA

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

a) **URBAN CENTRES\*:**

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

OR,

b) **NON URBAN CENTRES:**

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

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

## ALLOCATION CRITERIA

1. If a **school** of a **school jurisdiction** in an urban centre is located outside the city boundary (city limits) then funding is provided for each kilometer of **distance** greater than 25 kilometers from the **school** outside the city boundary to the Central Administration Office of the **school jurisdiction**.
2. **Distance** is electronically measured over the most direct route by way of a primary **highway** as shown on the current digitized map of the **school jurisdiction**. If a **school**, or if the Central Administration Office of a **school jurisdiction** is not on a primary **highway**, then the shortest route on a secondary road including a city street is used
3. Students enrolled in **Home Education**, **On-Line**, and **Institutional** programs and Hutterite Colony Schools are not counted for funding under this section.
4. An eligible school will be funded at a minimum 100 FTE or the actual enrollment, which ever is greater.

## SECTION 1.17 — Enrollment Growth

### ALLOCATION FORMULA

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

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

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

AND,

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

$$\text{School Level Allocation (for each eligible school)} = \left( \frac{\% \text{ Enrollment Growth this year over the prior year}}{7\%} - 7\% \right) \times \text{FTE funded enrolment from the prior year} \times \text{Enrollment Growth Rate}$$

### ALLOCATION CRITERIA

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

(Hutterite Colony Schools located in a **school jurisdiction** will be treated as one school enrollment)
2. Enrollment growth funding is not provided for in-year enrollment growth at either the **school jurisdiction** level or at the **school** level.
3. Enrollment growth funding is provided for a new **school** that begins operating on or before the **count date**. If circumstances prohibit the **school** from beginning operation on or before the **count date**, the Director of School Finance may consider approval of another **count date** for enrollment growth funding. School level enrollment growth funding will not be provided for schools transferred from one **school authority** to another.
4. Enrollment growth funding is provided for enrollment growth resulting from an expanded program that is implemented on or before the **count date**.

UPDATED

5. Enrollment growth funding is one-time in nature. Growth is determined on a year-to-year basis and involves the enrollments of the current year and the immediate preceding year. School Finance may review enrollment growth reported by **school jurisdictions** for reasonableness.
6. **Charter schools** will be treated as **school jurisdictions** and will qualify for enrollment growth funding only at the jurisdiction level.
7. For determining enrollment growth in **schools** that share a physical address with another **school(s)**, the sum of the enrollments of all **schools** that share that address will be treated as one **school** enrollment.
8. Students enrolled in Home education, and **online programs** are not counted for **school jurisdiction** enrollment growth funding under this section.
9. Students enrolled in Home education, **Outreach programs** and **online programs** are not counted for **school** enrollment growth funding under this section.

## SECTION 1.18 — Enrollment Decline

### ALLOCATION FORMULA

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

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

$$\text{School Jurisdiction Level Allocation} = \left( \frac{\% \text{ Enrollment Decline from the prior year to the current yr}}{1.5\%} - 1.5\% \right) \times \text{FTE funded enrollments} \times \text{Enrollment Decline Rate}$$

AND,

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

$$\text{School Level Allocation} = \left( \frac{\% \text{ Enrollment Decline from the prior year to the current yr}}{4\%} - 4\% \right) \times \text{FTE funded enrollments} \times \text{Enrollment Decline Rate}$$

### ALLOCATION CRITERIA

1. Funding eligibility:
  - a) **School Jurisdictions** – enrollment decline >1.5% year to year
  - b) **Schools** – enrollment decline >4 % year to year

(Hutterite Colony schools located in a **school jurisdiction** will be treated as one school enrollment)
2. Enrollment decline funding will not be provided for enrollment decreases resulting from a new **school** facility beginning operation or from program expansion relocations being implemented within the **school jurisdiction**, which has caused a decline in a particular **school**.
3. Enrollment decline funding is not provided for in-year enrollment decreases.
4. Enrollment decline funding is not provided in **school** closure situations.
5. Enrollment decline funding is one-time in nature since these enrollment decreases are determined on a year-to-year basis and involve the current year and the immediate preceding year enrollments. Enrollment decline attributable to a program being moved from one **school** to another does not qualify. School Finance may review enrollment decline reported by **school jurisdictions** for reasonableness.



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

## SECTION 1.19 — Small Schools by Necessity

### ALLOCATION FORMULA

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

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

$$\text{Base Allocation} = \$85,693 - \left[ \left( \frac{\$85,693}{76} \right) \times \left( \text{FTE funded enrollment} - 150 \right) \right]$$

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

2. Total Variable Allocation:

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

**TABLE 1**

Grade Category	School Rate	Peak Enrollment	Small School *FTE Funded Enrollment Limit	# of Grades in the Grade Configuration
K to 3	\$571	40	80	3.5
K to 6	\$1,601	80	150	6.5
K to 9	\$1,829	80	220	9.5
K to 12	\$2,857	80	290	12.5

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

For each school,

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

Where

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

And

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

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

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

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

Where

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

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

### 3. Total # of Small Schools

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

### 4. Total # of Small Schools by Necessity

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

- The **distance** from the small school to the 'receiving schools' must be within 25 km for schools in rural areas, and within 6 km for schools in urban areas. Urban areas are defined as Edmonton, Calgary, Red Deer, Lethbridge, Medicine Hat, Fort McMurray, Grande Prairie, St. Albert, Sherwood Park, Spruce Grove, and Stony Plain.
- The 'receiving schools' must have available capacity to accommodate the additional students. Available capacity at a 'receiving school' is defined as 85% of the **school building capacity**, less the 'FTE weighted funded enrollment'.
- The small school 'FTE weighted funded enrollment' can be designated to a maximum of 2 'receiving schools' per grade configuration. Grade configurations are defined as K-6, 7 – 9, and 10 – 12.

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

5. Closed Schools Allocation

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

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

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

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

## SECTION 1.20 — Small Board Administration

### ALLOCATION FORMULA

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

Small School Board  
Administration  
Allocation

- = a) \$457,023 for a **school jurisdiction** (excluding **charter schools**) with **FTE funded enrollment** of 2,000 students or less

OR

UPDATED

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

$$\$457,023 - \left[ \$457.02 \times \left( \text{FTE Funded enrollment} - 2,000 \right) \right]$$

OR

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

FTE Funded Enrollment	Allocation Formula
i) less than 500	\$188,154
ii) between 500 – 2,000	(i) + $\left[ \$104 \times (\text{enrollment} - 500) \right]$
iii) between 2,001 – 3,000	(i) + (ii) – $\left[ \$450 \times (\text{enrollment} - 2,000) \right]$
iv) greater than 3,000	No Small Board Administration Allocation

## SECTION 1.21 — Stabilization

### ALLOCATION FORMULA

$$\begin{array}{lcl} \text{Base Year Stabilization} & = & \text{Total Eligible Funding under the } \textit{Renewed} \\ \text{Calculation} & & \textit{Funding Framework (2003-2004)} - \text{Total Eligible funding under the Previous} \\ & & \text{Funding Framework (2003-2004)} \\ \\ \text{Stabilization Allocation} & = & \text{Previous Year Stabilization Allocation} + \text{Annual grant rate increase adjusted for} \\ & & \text{Funded Enrollment Decline} \end{array}$$

### ALLOCATION CRITERIA

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

Enrollment Data:		2003 – 2004 Base Year Calculation	
Year	Funded Enrollment	Total Eligible Funding	
03/04	5100	Previous Framework:	\$35,912,000
04/05	5100	Less	
05/06	5050	Renewed Funding Framework:	\$34,612,000
06/07	5000	03 – 04 Stabilization Funding:	\$1,300,000
07/08	4900		

### ADJUSTMENTS: Funding rate increase for each year and enrollment decline for each year:

$$\begin{array}{l} 2004 - 2005: \\ \$1,300,000 \times 1.02 \times \frac{5100}{5100} = \$1,326,000 \end{array}$$

$$\begin{array}{l} 2005 - 2006: \\ \$1,326,000 \times 1.02 \times \frac{5050}{5100} = \$1,339,260 \end{array}$$

$$\begin{array}{l} 2006 - 2007: \\ \$1,339,260 \times 1.02 \times \frac{5000}{5050} = \$1,352,520 \end{array}$$

$$\begin{array}{l} 2007 - 2008 \\ \$1,352,520 \times 1.03 \times \frac{4900}{5000} = \$1,365,234 \end{array}$$

## SECTION 1.22 — Hutterite Colony Schools

### ALLOCATION FORMULA

$$\text{Hutterite Colony Schools Funding} = \text{\# of colony schools with funded children/students} \times \text{Rate per colony school}$$

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

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

## SECTION 1.23 — Francophone Equivalency

### ALLOCATION FORMULA

$$\text{Francophone Equivalency Access (FEA) Funding} = \text{\# of Eligible funded students Grades 1 – 12} \times \text{FEA Rate}$$

### ALLOCATION CRITERIA

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

## SECTION 1.24 — Plant Operations and Maintenance (School Jurisdictions)

UPDATED

### ALLOCATION FORMULA

$$\text{Plant Operations and Maintenance Allocation} = \left[ \text{Base Line Funding} \times \left( 1 + \frac{\text{Sparsity - Distance Factor}}{\text{Factor}} \right) \right] + \text{Travel Time Allowance} + \text{Small Schools by Necessity Differential}$$

#### 1. Baseline Funding:

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

Grades	Rate per Weighted FTE
K – 6	\$757
7 – 9	\$715
10 – 12	\$719

## 2. Sparsity-Distance Factor:

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

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

**Sparsity-Distance Factor Table**

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

## 3. Travel Time Allowance

This component allows for maintenance staff travel time and is determined as follows:

(sum of the **distance** from each school to the central shop less 25 kilometers) X (3 trips to school per week X 52 weeks) X \$0.45 per kilometer.

## 4. Small Schools By Necessity (SSBN) Differential

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

- SSBN Differential X K-6 % of total funded enrollments X \$757 per student
- SSBN Differential X Gr. 7 – 9 % of total funded enrollments X \$715 per student
- SSBN Differential X Gr. 10 – 12 % of total funded enrollments X \$719 per student

Each school's SSBN Differential is determined as follows:

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

The "% of total funded enrollments" is calculated by dividing the 2007 – 2008 funded enrollment for the grade range by the total 2007 – 2008 funded enrollment (across all grades) for the **school jurisdiction**. The jurisdiction's 2007 – 2008 "funded enrollments" are calculated using the same criteria as for the Baseline Funding component.

The SSBNs used in this formula are those that qualified for SSBN funding in the 2007 – 2008 **school year** (section 1.19).

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

## SECTION 1.25 — Charter Schools

### ALLOCATION FORMULA

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

### ALLOCATION CRITERIA

#### 1. Base Instruction

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

#### 2. Transportation

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

3. Funding for **students with severe disabilities** attending **charter schools** is provided based on the eligibility of individual students. **Charter schools** that have **students with a severe disability** must comply with the Conditions and Requirements outlined in Section 3.3.
4. The student count used by a **charter school** as of the **count date** must not include students counted by another **school authority** on the **count date**.

### REFERENCES

Alberta Regulation 212/2002 School Act — **Charter Schools** Regulation

**Charter Schools** Handbook (2002)

## C. TRANSPORTATION

### SECTION 1.26 — Boarding

#### ALLOCATION FORMULA

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

#### ALLOCATION CRITERIA

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

### SECTION 1.27 — Fuel Price Contingency

#### ALLOCATION FORMULA

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

#### ALLOCATION CRITERIA

1. Fuel Price Contingency funding is allocated to rural, urban, and metro **school jurisdictions** as well as **charter schools**.
2. For rural and urban **school jurisdictions** and **charter schools**, the formula is calculated based on the variables of bus **route distances**, fuel consumption rates, and the average monthly price of fuel that exceeds the rate of 60 cents per liter.
3. For metro urban **school jurisdictions**, the formula is based on estimated kilometers traveled. Urban **school boards** that utilize public transit receive a funding adjustment based on local transit pass cost increases.
4. For information on your **school jurisdiction's** funding allocation, please contact the Business Operations and Stakeholder Support branch for details.



## SECTION 1.28 — Rural Transportation

### ALLOCATION FORMULA

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

- a) **Rural Transportation Support**

$$\text{i) Density Support} = \frac{\text{Applicable Annual Density Rate per Eligible Passenger/Eligible Transported ECS Child}}{\text{Eligible Passenger/Eligible Transported ECS Child}} \times \text{Applicable Weighting Factor} \times \text{Eligible Passenger/Eligible Transported ECS Child}$$

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

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

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

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

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

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

- c) **Cooperative Transportation**

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

$$\frac{\text{Number of non-resident eligible passengers/eligible transported ECS children transported under a cooperative bussing arrangement}}{\text{50\% of the transporting school board's density rate}} \times \text{50\% of the transporting school board's density rate}$$

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

Refer to Section 1.31, Special Transportation

### ALLOCATION CRITERIA

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

Where a **board** of a **rural district** has under its jurisdiction a city, town, village or hamlet with a population of 10,000 or fewer and transports an **eligible passenger** or **eligible transported ECS child** residing within those boundaries to a **school** of a program listed under Allocation Criteria #3 of this section outside those boundaries, the **board** may receive funding for

each **eligible passenger** and for each **eligible transported ECS child** under the Rural Transportation formula. These students may not be included as **eligible passengers** under the Urban Transportation formula.

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

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

2. Rural Transportation Funding:

- a) If a student who is not a **resident student** of the **board** accesses that **board's** transportation system in accordance with the Student Transportation Regulation, Section 4, at a point 2.4 kilometers or more from the **school** attended, and where there is not a **transportation agreement** or an **education services agreement** between the **resident board** and the **board** providing transportation, the **board** providing transportation service may claim only the **density** support for that student.
- b) If a **board** extends its transportation service outside its jurisdiction boundaries to provide service to a non-resident student not covered by a **transportation agreement** or an **education services agreement** between the **resident board** and the **board** providing transportation, the **board** providing transportation service is not eligible for transportation funding for that student.
- c) If a **resident student** of a **board** is transported by the **board** to a **school** of the **parent's** choice outside the attendance area or transportation service area (as defined in the *Student Transportation Regulation*) of the **designated school** for the student, only **density** support and **distance** support to the nearest **school** may be claimed for that student if he or she is an **eligible passenger**. Where a **board** has adopted over-lapping **school** attendance or transportation service areas, **density** support and **distance** support to the **school** nearest the student's residence may be claimed.
- d) In the case of a **school jurisdiction** which is providing transportation in only a portion of its area, for those **eligible passengers** residing in the jurisdiction but beyond the transportation service area and are transported through co-operative bussing arrangements with other **school authorities**, area and **density** for the **school jurisdiction** shall be calculated on the basis of the area directly served by the **school jurisdiction** and the **eligible passengers** residing in that area.
- e) If a **board** is providing transportation services under a cooperative bussing arrangement with another **board** and the two **boards** are not sharing a co-terminus area, the area of the **board** receiving transportation services may be added to the transporting **board's** area for determining the **density** rating for the transporting **board**.
- f) Rural transportation funding under this section is available only to **boards** operating student transportation systems. A **board** accessing transportation services for its **resident students** through a cooperative bussing arrangement is not eligible for rural transportation funding under this section.
- g) Notwithstanding subsection (f), a **board** transporting an **eligible passenger** of another **board** under a **transportation agreement** to the **designated school** of that **resident board**, who resides outside the transportation service area of the resident **board** and accesses the bus route of the **board**, may claim the **density** and the **distance** support from the **designated school** to the point where the student accesses the bus route for that **school**. The **resident board** may claim only the **distance** support from the residence of the student to the point where the student accesses the bus route for the **designated school**, at the **distance** rate received by the transporting **board**.

- h) **Eligible passengers** with severe disabilities who ride on a regular route **school bus** will be claimed under this section using the **density** and **distance** formula and are not eligible for funding under Section 1.21, Special Transportation.
  - i) Buses may be designated only for the transportation of those **students and children with disabilities/delays** who, because of the severity of their disability/delay, are unable to ride on a regular route **school bus** may be claimed under this section using the **density** and **distance** formula or under Section 1.31, Special Transportation. (NOTE: all students on designated buses must be claimed under the same section.)
  - j) Students in a wheelchair who ride a **school bus** will be funded at 8 times the regular rate.
3. ECS Transportation:
- k) A **school jurisdiction** that claims ECS Regular Transportation funding must transport, or make arrangements for the transport of **funded children** attending **ECS programs** at a service level that is consistent with the transportation of students under Section 51 (2) of the *School Act*.
  - l) A **school jurisdiction** providing transportation to and from an **ECS program** may charge the **parent** of a **child** a fee for the transportation service. The total amount of fees charged to ECS **parents** for transportation services shall not exceed the total cost of the provision of ECS transportation services less the ECS transportation funding received from Alberta Education.
  - m) Each **eligible transported ECS child** transported will be counted as 1.0 weighted passenger in determining rural transportation funding support.
  - n) A **school jurisdiction** may claim **eligible transported ECS children** it transports to programs operated by another **board**, a **private school**, or a **private ECS operator** as **eligible passengers** if the **board** has a **transportation agreement** with the other **board**, **private school**, or **private ECS operator**.
4. Inter-school Transportation:
- o) Inter-school transportation for students whose courses of study require a special **school** facility or equipment not available in the **school** they attend, may be claimed for support provided that:
    - the course of study is prescribed or approved by the **Minister** under the *School Act*, Section 39 (1);
    - the course of study requires a special **school** facility or equipment not available at the **school** of daily attendance for those students; and
    - the course of study requires the use of the special **school** facility or equipment for at least 18 consecutive weeks.
  - p) Off-Campus Education Programs, recreational programs, and intermittent bussing to such activities as swimming programs are not eligible for inter-school transportation support.
5. Funding shall not be paid under this section for a **funded student** or a **funded child** who is counted under the Special Transportation funding (Section 1.31).
6. Transportation support shall be paid based on the **distance** from the student's residence to the **school** in the attendance area or transportation service area in which the student resides.
- If the student is directed by the **board** to attend another **school** for any of the following program considerations and the **school board** at its discretion transports the student to that school, transportation support shall be paid based on the **distance** from the student's residence to the school to which the student was directed. The following is a list of program considerations:
- **Alternative French language programs** (including French immersion and bilingual programs) and **other language immersion programs**;
  - Special Education programs to meet the needs of **students with severe disabilities**;

- Special Education programs to meet the need of students with mild/moderate disabilities when **board** criteria have been met;
  - high school CTS programs offered to an advanced level in a specialized classroom facility where the course curriculum requires the instructor to have the technical trade qualification (Courses include Mechanics, Fabrication Studies, Cosmetology and Construction Technology).
7. A **board's** resident students in an **Online program** or an **Outreach program** -where they are accessing 50% or more of their educational program at a **school** of the **board**- or students in a **Blended program**, that are transported by the **board** to a **school** of the **board**, may be claimed as **eligible passengers** under Rural Transportation.

## DOCUMENTATION AND REPORTING REQUIREMENTS

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

Note that the 2007/2008 "RURAL CLAIM" includes the Rural Special Transportation section in the claim form; please refer to Section 1.31 Special Transportation for Rural Special Transportation Allocation Criteria and funding rates.

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

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

## ADDITIONAL INFORMATION

1. **First Nations students who reside on a reserve** shall not be counted as **eligible passengers**.
2. **School jurisdictions** may also qualify for Relative Cost of Purchasing Goods and Services Adjustment (RCPA) funding for transportation services. Please see details in Section 1.14.

## SECTION 1.29 — Urban Transportation

### ALLOCATION FORMULA

1. **Urban District** transportation:

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

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

2. Francophone Authorities within an Urban Area:

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

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

3. Inter-School Transportation Support:

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

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

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

### ALLOCATION CRITERIA

1. A **school jurisdiction** that is an **urban district** or **division** may receive urban transportation funding for each **eligible passenger** and each **eligible transported ECS child**.

2. For an **eligible passenger** or **eligible transported ECS child** of a city, town, village or hamlet with a population of:
  - 10,000 or fewer, refer to Section 1.28;
  - between 10,000 and 19,999, the rate applicable is the lowest **density** funding rate provided to rural **school jurisdictions**;
  - between 20,000 and 29,999, the rate applicable is the mid-point between the above two rates (i.e. the lowest rural **density** funding rate and the urban transportation rate);
  - 30,000 or greater, the rate applicable is the urban transportation rate;
3. An **urban district** may receive funding for a student who is not a **resident student** of the **board** that accesses the **board's** transportation system in accordance with the *Student Transportation Regulation*, Section 4, at a point that is 2.4 kilometers or more from the **school** in which the student could be enrolled.
4. If an **urban district** extends its transportation service outside its jurisdiction boundaries to provide service to a non-resident student not covered by a **transportation agreement** or an **educational services agreement** between the **resident board** and the **board** providing transportation, the **board** providing transportation service is not eligible for transportation funding for that student.
5. An **urban district** that claims ECS regular transportation funding must transport or make arrangements for the transportation of **eligible transported ECS children** at a service level that is consistent with the transportation of students under Section 51(1) of the *School Act*.
6. An **urban district** providing transportation to and from an **ECS program** may charge the **parent** of a **funded child** a fee for the transportation service. The total amount of the transportation fee charged to **parents** shall not exceed the total costs of the provision of ECS transportation services less the ECS transportation funding the **school board** receives from Alberta Education.
7. An **eligible passenger** or an **eligible transported ECS child** can only be counted once under this section.
8. Inter-school transportation funding is not provided for transporting students or ECS children between **schools**.
9. Where a **board** has adopted over-lapping **school** attendance or transportation service areas, eligibility for funding under this section is determined by the **distance** to the **school** nearest the student's residence.
10. If a **resident student** of an **urban district** is enrolled in a **school** of the **parent's** choice outside the attendance area or transportation service area (as defined in the *Student Transportation Regulation*) in which the student resides, eligibility for transportation support is determined by the **distance** to the **school** nearest the student's residence.
11. If a **board** of an **urban district** or **division** transports students residing less than 2.4 km from the **school** within the attendance area or transportation service area (as defined in the *Student Transportation Regulation*) in which the students reside, to a **school** other than the **school** within the attendance area or transportation service area in which the students reside because the enrollment of that **school** is equal to or greater than its rated capacity, then the number of students transported that is equal to or greater than the number of students not resident 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.
13. To recognize the dispersion of students for a Francophone authority within an **urban district** a weighted factor of 3.5 will be used for Francophone **eligible passengers** (Grades 1 – 12) and Francophone **eligible transported ECS children**.



14. **Eligible passengers** with severe disabilities who ride on a regular route **school bus** will be claimed under this section using the urban transportation rate and are not eligible for funding under Section 1.31, Special Transportation.

Busses may be designated only for the transportation of those **students and children with disabilities/delays** who cannot, because of the severity of their disability/delay, ride a regular route **school bus** may be claimed under Section 1.31, Special Transportation. (NOTE: all students on designated busses must be claimed under the same section.)

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

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

The following is a list of program considerations:

- **Alternative French language programs** (includes French Immersion and bilingual programs) and **other language immersion programs**;
  - Special Education programs to meet the needs of **students with severe disabilities**;
  - Special Education programs to meet the needs of students with mild/moderate disabilities, when **board** criteria have been met;
  - High school CTS programs offered to an advanced level in a specialized classroom facility where the course curriculum requires the instructor to have the technical trade qualification (Courses include Mechanics, Fabrication Studies, Cosmetology and Construction Technology).
16. Students in an **Online program** or an **Outreach program** -where they are accessing 50% or more of their educational program at a **school** of the **board**- or students in a **Blended program**, that are transported by the **board** to a **school**, may be claimed as **eligible passengers** under Urban Transportation.
17. Inter-school Transportation
- a) Inter-school transportation for students whose courses of study require a special **school** facility or equipment not available in the **school** they attend, may be claimed for support provided that:
    - the course of study is prescribed or approved by the **Minister** under the *School Act*, Section 39 (1);
    - the course of study requires a special **school** facility or equipment not available at the **school** of daily attendance for those students; and
    - the course of study requires the use of the special **school** facility or equipment for a least 18 consecutive weeks.
  - b) Off-Campus Education Programs, recreational programs, and intermittent bussing to such activities as swimming programs are not eligible for inter-school transportation support.

## DOCUMENTATION AND REPORTING REQUIREMENTS

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

Note that the 2007/2008 “URBAN CLAIM” includes the Urban Special Transportation section on the claim form; please refer to Section 1.31 Special Transportation for Urban Special Transportation Allocation Criteria and funding rates.

2. Transportation support payments for each new **school year** will be paid at 100% of the previous year's funded monthly amount until the review of the new funding application has been completed. If the new funding application has not been received by December 31, the January payment will be reduced to 75% of the previous year funded monthly amount retroactive to September 1, and continued until the new funding application is received and reviewed.
3. Only **funded students** and **funded children** enrolled on the **count date** are eligible for funding. Special consideration for the **count date** may be given to **school jurisdictions** experiencing exceptional growth in transportation needs.
4. Urban transportation funding is calculated by multiplying the number of **eligible passengers** and **eligible transported ECS children** by the urban transportation rate.
5. The funding an urban jurisdiction receives for rural students will be calculated using the Rural Transportation formula. These students cannot be included as **eligible passengers** under the Urban Transportation formula.
6. **Urban districts** are required to retain the following information on file for a minimum of seven years and make it available for review by Alberta Education upon request. Items a), b), c), and d) should be kept in an electronic file and made available to Alberta Education either electronically or on a computer disc:
  - a) electronic geographic roadway maps of overall attendance areas and transportation service areas;
  - b) location of each student's residence (street addresses in town, villages and hamlets);
  - c) maps of individual bus routes;
  - d) a list of names of **eligible transported ECS children** transported by bus and the names and grades of **eligible passengers**;
  - e) records of **route distance** verified by an official(s) of the **school jurisdiction**;
  - f) copies of **education service agreements**;
  - g) copies of **transportation agreements** with **school boards**, **private schools**, **charter schools** and **private ECS operators**;
  - h) copies of current vehicle inspection certificates issued under the *Highway Traffic Act*; and
  - i) copies of contracts with:
    - (i) operators of contracted **school busses** for regular transportation;
    - (ii) **parents** providing transportation showing amounts paid.

## ADDITIONAL INFORMATION

1. **First Nations students who reside on a reserve** shall not be counted as **eligible passengers**.
2. **School jurisdictions** may also qualify for Relative Cost of Purchasing Goods and Services Adjustment (RCPA) funding for transportation services. Please see details in Section 1.14.



## SECTION 1.30 — Metro Urban Transportation

### ALLOCATION FORMULA UNDER REVIEW

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

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

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

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

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

## ALLOCATION CRITERIA

1. Edmonton School District No.7, Edmonton Catholic Separate School District No. 7, Calgary School District No. 19 and Calgary RCSSD No. 1 are eligible for Metro Urban Transportation funding.
2. Funding is determined using a **school** size “benchmark”. The benchmark is the lesser of two values: the jurisdiction’s average **school** size and the average **school** size in the four jurisdictions. A benchmark is determined for each of the three levels (elementary, junior high and senior high).
3. The number of **expected eligible passengers** is calculated using the following factors:
  - a) the benchmark for each level;
  - b) the number of **schools** by level;
  - c) the number of **funded students** and ECS **funded children**;
  - d) the residential area;
  - e) the number of **funded students with severe disabilities** based on the jurisdiction profile.
4. The following conditions are to be used in determining the number of **schools** servicing the three **school** levels in the public and separate **school boards** in Edmonton and Calgary:
  - a) **institutions**, outreach **schools**, schools that solely serve home education **students**, and other special **schools** (**schools** where the majority of the **funded students** are special education needs students) as determined by School Finance are excluded;
  - b) an ECS-elementary school with fewer than 75 students is not counted;
  - c) an ECS-elementary school with 75 or more students and 3 or fewer grades will be counted as half an ECS-elementary school;
  - d) a junior high school with fewer than 75 students is not counted;
  - e) a senior high school with fewer than 75 students is not counted; and
  - f) a senior high school with fewer than 200 but with 75 or more students is counted as a junior high school.
5. The formula used to calculate Metro Urban Transportation funding contains the number of **schools** by level, the residential area, and the number of **funded students** attending **schools** within the jurisdiction.
6. The **school jurisdictions** in Calgary and Edmonton which are transporting **eligible transported ECS children** to board-operated programs will be eligible for transportation funding under the Metro Urban Transportation funding. The ECS enrollments will be included in the formula.
7. ECS **children with disabilities** who require special transportation will be funded outside of the Metro Urban Transportation formula at the ECS Special Transportation rate. Transportation funding for **children with disabilities** should be claimed under Section 1.33 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.

UPDATED

8. **School jurisdictions** receiving Metro Urban Transportation funding must transport or make arrangements for the transport of **children** attending **ECS programs** at a service level that is consistent with the transportation of students under Section 51(1) of the *School Act*.
9. When a metro urban district is accessing the Metro Urban Transportation funding and has under its jurisdiction an area included in another municipality, the metro urban district may be reimbursed for each **eligible passenger** transported to **school** using the rural transportation formula, or, if the municipality is a city outside of Calgary or Edmonton, for each **eligible passenger** using the Urban Transportation formula. A metro urban district currently claiming under this section and seeking to claim either Rural Transportation (Section 1.28) funding, or Urban Transportation (Section 1.29) funding, must have approval from the **Minister**. Requests for approval should be submitted to the Financial Reporting and Accountability Branch.
10. A metro urban district, which has made an arrangement with a **charter school** to transport the **charter school's** students, may include the **funded students** attending the **charter school** for the purposes of calculating the number of **expected eligible passengers**. The **charter school** is not counted by the **school jurisdiction** in determining the number of **schools**.

## DOCUMENTATION AND REPORTING REQUIREMENTS

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

## ADDITIONAL INFORMATION

1. A **school jurisdiction** providing transportation to and from an **ECS program** may charge the **parent** of a **funded child** a fee for the transportation service. The transportation fee charged to **parents** shall not exceed the total cost of the provision of ECS transportation services less the ECS transportation funding the **school jurisdiction** receives from Alberta Education.
2. The metro urban formula is currently under review and will continue for the 2008 – 2009 school year.

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

## SECTION 1.31 — Special Transportation

### ALLOCATION FORMULA

#### 1. a) Special Transportation:

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

#### b) Weekend Transportation

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

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

$$\begin{array}{l} \text{Family-oriented ECS} \\ \text{programming Transportation Allocation} \\ = \begin{array}{l} \text{Number of scheduled family-oriented ECS programming} \\ \text{sessions for children with severe disabilities/delays} \\ \text{(minimum 4 and maximum 36)} \end{array} \times \begin{array}{l} \text{Rate per} \\ \text{Round Trip} \end{array} \end{array}$$

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

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

### ALLOCATION CRITERIA

1. Urban or rural **school jurisdictions** may receive special transportation funding for resident **students/children with disabilities/delays** riding on a bus designated only for the transportation of those **students/children with disabilities/delays** who cannot, because of the severity of their disability/delay, use the transportation services described in Sections 1.28, 1.29, or 1.30 of this manual. The metro urban **school jurisdictions** (Edmonton and Calgary) are eligible for ECS Special Transportation funding under this section. (NOTE: all students on designated busses must be claimed under the same section.)
2. Program or **school** location shall not be considered when determining eligibility for this funding.
3. Special Transportation funding is provided for **children with disabilities/delays** 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) an **accredited funded private school**;
  - c) a **private ECS operator**; or
  - d) a program at an **institution** operated and/or funded by Alberta Education:
    - i) which the **student with a disability** has been directed to attend by the **school jurisdiction** because the **school jurisdiction** does not operate a suitable program, or
    - ii) which is the closest suitable and available program offered.

4. To claim Special Transportation funding for a **student with a disability** attending an **accredited funded private school**, the **school jurisdiction** must have directed the student to attend that **school**.
5. Weekend transportation funding is provided to **school jurisdictions** when **students with disabilities** are transported on weekends between their permanent residences and their boarding places by their **parents** and are attending:
  - iii) the **school** of a **school jurisdiction**; or
  - iv) an **accredited funded private school**.

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

ECS SPECIAL TRANSPORTATION
6. Funding will be paid based on the number of days that a **child with a disability/delay** is transported to/from the **ECS program** up to a maximum of 185 days.
7. Transportation for **Family-Oriented Programming** sessions (Program Unit **Funded children** only):
  - a) This transportation funding is provided for each scheduled **family-oriented programming** session delivered by a teacher, a child development specialist, or a teacher assistant in the home of a **child with a severe disability/delay**.
  - b) a minimum of 4 sessions and a maximum of 36 sessions for a Program Unit **Funded child** may be claimed for **family-oriented programming** Transportation funding:
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/delays** under Program Unit Funding.

## DOCUMENTATION AND REPORTING REQUIREMENTS

1. **School jurisdictions** are required to submit electronically their claims to the Business Operations and Stakeholder Support Branch by November 30. Payment is made on the basis of the submitted information, the Special Transportation Allocation Criteria and funding rates, and in accordance with the *School Act* and the *Student Transportation Regulation, A.R. 250/1998; amended A.R. 197/2000*.  
  
Please note that: Rural Special Transportation information (including Weekend and Boarding, if applicable) will be reported on the RURAL CLAIM. Urban Special Transportation information (including Weekend and Boarding, if applicable) will be reported on the URBAN CLAIM. ECS Special Transportation will have a separate claim form called ECS SPECIAL, which is also due to the Business Operations and Stakeholder Support Branch by November 30.
2. Transportation support payments for each new **school year** will be paid at 100% of the previous year's funded monthly amount until review of the new funding application has been completed. If the new funding application has not been received by December 31, the January payment will be reduced to 75% of the previous year funded monthly amount retroactive to September 1 and continued until the new funding application is received and reviewed.
3. Only **funded students** and **funded children** enrolled on the **count date** are eligible for funding. Special consideration on the **count date** may be given to **school jurisdictions** experiencing exceptional growth in transportation needs.
4. **School jurisdictions** are required to retain the following information on file for a minimum of seven years and make it available for review by Alberta Education upon request. Items a), b), and c) should be kept in an electronic file and be made available to Alberta Education either electronically or on computer disc.
  - a) electronic geographic roadway maps of overall attendance areas and transportation services areas;

- b) location of each student's/child'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:
  - v) written **transportation agreements** with agents, organizations, **parents** or other persons;
  - vi) records showing the amount to be paid on behalf of **students/children with disabilities** who require special transportation.

## ADDITIONAL INFORMATION

1. **School jurisdictions** may also qualify for Relative Cost of Purchasing Goods and Services Adjustment (RCPA) funding for transportation services. Please see details in Section 1.14.
2. Funding for **parent**-provided transportation of ECS children with special needs is not provided under this section but instead is provided under either Section 1.28 (Rural Transportation) or Section 1.29 (Urban Transportation).

## SECTION 1.32 — ECS Regular Transportation (private operators)

### ALLOCATION FORMULA

# eligible transported ECS children      X      transportation rate for private ECS operators

### ALLOCATION CRITERIA

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

5. To apply for ECS Regular Transportation funding, **private ECS operators** are required to submit electronically their ECS transportation claim form to the Business Operation and Stakeholder Support Branch by November 30. Payment is made on the basis of submitted information, funding allocation criteria and funding rates. Please note that the electronic transportation claim form will have both regular and special transportation application forms. **School jurisdictions** that provide transportation for a **funded child** will claim the **funded child** as an **eligible transported ECS child** under rural transportation, urban transportation or metro urban transportation block. For further details please refer to Section 1.28, Rural Transportation; Section 1.29, Urban Transportation; and Section 1.30, Metro Urban Transportation Block.
6. For **ECS programs** beginning in September, transportation funding is based on **funded child** registration information as of the **count date**.
7. For **ECS programs** beginning after September 30, the **count date** for transportation will be the last **operating day** of the month in which the program begins. The Electronic ECS transportation claim form must be submitted to the Business Operations and Stakeholder Support Branch within three weeks of that date.
8. **Eligible transported ECS children** registered after the **count date** are not eligible for regular transportation funding.
9. **Private ECS operators** may enter into **transportation agreements** with **school jurisdictions** for the transportation of **eligible transported ECS children** enrolled in their programs. Funding for these children will be claimed by the **school jurisdictions** providing the transportation service.

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

## SECTION 1.33 — ECS Special Transportation (Private Operators and Metro Urban School Jurisdictions)

### ALLOCATION CRITERIA

1. Special Transportation
  - a) **private ECS operators** may receive Special Transportation funding for ECS **children with disabilities/delays** who cannot be accommodated by regular transportation because of their disabilities and, therefore, require special transportation, such as a handi-bus.
  - b) **distance** and **school** location shall not be considered when determining eligibility for this funding.
2. **Family-Oriented Programming** Transportation Funding
  - a) this transportation funding is for each scheduled **family-oriented programming** session delivered by a teacher, a child development specialist, or a teacher assistant to the home of a **child with a severe disability** receiving **family-oriented programming**.
  - b) transportation funding is provided for each session up to a maximum of 36 sessions for each program unit **funded child**,
3. Transportation costs incurred for field trips or in-program activities cannot be claimed under this funding. For **children with severe disabilities/delays** these costs may be claimed under Program Unit Funding.

UPDATED



4. A **private ECS operator** that claims ECS special transportation funding must transport, or make arrangements for the transportation of **children with special education needs** attending the **ECS program**. Transportation funding cannot be claimed if the **private ECS operator** has not provided or arranged transportation or if no cost was incurred by the **private ECS operator** to transport a **funded child**.
5. If the transportation of **children with special education 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.
6. When an **eligible transported ECS child** is transported by their **parent(s)**, the ECS Regular Transportation rate will apply.
7. To apply for ECS Special Transportation funding, **private ECS operators** are required to submit their ECS transportation claim form electronically to the Business Operation and Stakeholder Support Branch by November 30. Payment is made on the basis of submitted information, funding conditions and funding rates. Please note that the electronic ECS transportation claim form can be used to claim both regular and special transportation.

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

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

8. **Private ECS operators** are to maintain records of:
  - names of children transported;
  - number of days each individual child is transported;
  - number of **family-oriented programming** sessions;
  - actual costs of transportation; and
  - special transportation provided.
9. For **ECS programs** beginning in September: transportation funding is based on **funded child** registration information as of the **count date**.
10. For **ECS programs** beginning after September 30: the **count date** for transportation will be the last **operating day** in the month in which the program begins. The electronic ECS transportation claim form must be submitted to the Business Operations and Stakeholder Support Branch within 3 weeks of that **count date**.
11. **ECS children with special education needs** registered after the **count date** are not eligible for special transportation funding. Transportation costs for **ECS children with severe disabilities/delays** eligible to receive PUF may be claimed as a Program Unit expense.
12. 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 fee shall not exceed the total cost of the provision of ECS transportation services less the ECS transportation funding received from Alberta Education.



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

(Section 2.1 to 2.5 — see Table of Contents)

### SECTION 2.6 — ECS Plant Operations and Maintenance

#### ALLOCATION FORMULA

$$\# \text{ of funded children} \times \text{PO\&M Rate for ECS}$$

#### ALLOCATION CRITERIA

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

### SECTION 2.7 — ECS Administration

#### ALLOCATION CRITERIA

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

Administration funding for **private ECS operators** will be adjusted based on the final PUF amount approved.

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

(Section 3.1 — refer to Section 1.2)

### SECTION 3.2 — Designated Special Education Private Schools (DSEPS)

#### ALLOCATION CRITERIA

1. Funding is provided for **students with special education needs**, who are enrolled on the **count date** and meet Alberta Education coding criteria as outlined in the Special Education Coding Criteria 2008/2009.
2. The **DSEPS** must advise **parents** of the need to discuss their **child's mild/moderate disability** and programming options with their **resident board** before enrolling in the **DSEPS**. The **resident board** must retain a record of the discussion.  
  
**Parents** are required to consult with a **school** official of their **resident board** regarding their child's special education programming options. A **parent** consultation must involve all of the following:
  - a) a **school** official of the **resident board** (for example, the Principal or Special Education Coordinator) must review with the **parent(s)** the assessment that diagnosed their child with a mild/moderate disability;
  - b) the **resident board** must offer and explain to the **parent** what type of special educational program the **resident board** can provide for the student;
  - c) if, after being advised of the special education program the **resident board** can provide, the **parent(s)** decides to enroll their child in a **DSEPS**, the **parent(s)** must notify the **resident board** that they are moving their child to a **DSEPS**.
3. One of the following types of documentation must be kept on file at the **DSEPS** to confirm the **parent** consultation:
  - a signed registration form at the **DSEPS** which contains a statement declaring that the **parent** consulted with their **resident board**; or
  - a signed letter from the **parent** attesting that they consulted with the **resident board**; or
  - a letter from the **resident board** official confirming that the **parent(s)** consulted with them about their child's special education needs programming needs.
4. Funding rates for **DSEPS**:
  - a) \$10,473 per student with a **mild/moderate disability** when the **parent** has consulted with the **resident school board** (grant code 110 and 500 applicable 50 code)
  - b) \$6,523 per student with a **mild/moderate disability** when **parent** enrolls student without consulting the **resident school board** (grant code 500 and applicable 50 code)
  - c) \$6,523 per **student with a severe disability**, (grant code 500 and applicable 40 code)
5. **DSEPS** must notify each applicable **school board**, in writing, of the **board's resident students** who are registered at the **DSEPS**. This list should indicate:
  - which students' **parents** consulted with the **resident board** on the special education programming options for their **funded student** prior to enrollment at the **DSEPS**; and

UPDATED

UPDATED

- which students are newly enrolled; and
  - which students are currently attending who were enrolled in previous years.
6. The **DSEP** must submit a list of students to Director of School Finance by December 15 identifying:
    - a) students where **parents** consulted with the **resident board** and attach documents referred to in #3
    - b) students where **parents** did not consult with the **resident board**
  7. Transfer of funding between jurisdictions and **DSEPS** is not required for students who move after the **count date**
  8. A **school jurisdiction** that directs a student to a **DSEPS** will pay all program costs that are not covered by funding provided by Alberta Education to the **DSEPS**.

UPDATED

## REFERENCES

Special Education Coding Criteria 2008/2009

Standards for Special Education, Amended June 2004

## SECTION 3.3 — Severe Disabilities (Including Charter Schools)

### ALLOCATION FORMULA

UPDATED

# of approved **students with severe disabilities**

X

severe disabilities funding rate

### ALLOCATION CRITERIA

1. **Accredited funded private schools** and **charter schools** will use the severe disabilities categories and codes outlined in the Special Education Coding Criteria 2008 – 2009, and the Handbook for the Identification and Review of students with Severe Disabilities to determine a student's eligibility and to properly code the student for funding purposes.
2. Severe disability funding will be based on approval of the student's eligibility by the Special Programs Branch and on enrollment data as of the **count date**.
3. The eligibility of new students will be audited by the Special Programs Branch in the first year they are claimed for funding by the **accredited funded private school**, or the **charter school**. Once a student is approved for severe disabilities funding, auditing for eligibility by Alberta Education will occur no more than every three years unless otherwise required to maintain funding.
4. **Accredited funded private schools** providing an approved educational program in an **institution** may not claim severe disabilities funding for **students with severe disabilities** who are funded through **institution** program funding.
5. **Students with severe disabilities** enrolled in an **online program**, **blended program** or **home education** program are not eligible for severe disabilities funding.
6. Eligibility and approval of severe disabilities funding will be based on an audit of each student's file. Each information file must contain all of the following:
  - a) assessment and diagnosis by qualified personnel;
  - b) documentation/assessments of the student's current level of functioning in the learning environment;

- c) **students with severe disabilities** must receive three or more of the **levels of support** identified to meet their educational needs.
- d) a current **Individualized Program Plan (IPP)** based on the Standard for Special Education, Amended June 2004, which addresses the student's diagnosed needs
- 7. The following **students with severe disabilities** may be claimed on the March 1 enrollment count and are eligible for 50% of the severe disabilities funding rate:
  - a) Students who move from a **school jurisdiction or an institution**, after the **count date** to an **accredited funded private school** (including **DSEPS**), or **charter school**.
  - b) Students who were not registered with any **school authority** on the **count date** and who register in an **accredited funded private school** or a **charter school** after the **count date**.
- 8. Funding must be transferred from an **accredited funded private school** or a **charter school** on a 10 month basis for **students with severe disabilities** who transfer after the **count date** to:
  - a. a **school jurisdiction**
  - b. a different **accredited funded private school** or a **charter school**

## REFERENCES

Handbook for the Identification and Review of Students with Severe Disabilities 2008 – 2009  
Special Education Coding Criteria 2008/2009  
Standards for Special Education, Amended 2004

## SECTION 3.4 — Early Literacy

### ALLOCATION FORMULA

$$\begin{array}{ccc} \text{\# of Gr 1 and 2 students on} & \times & \text{Early Literacy Rate} \\ \text{count date} & & \end{array}$$

### ALLOCATION CRITERIA

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

**(Section 3.5 to 3.10 — see Table of Contents)**

## SECTION 3.11 — Relative Cost of Purchasing Adjustment (Level 2 only\*)

NEW

### ALLOCATION FORMULA

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

Where

a = 20% x **private school** funding (with exclusions listed below)b = 75% x **private school** Plant Operations and Maintenance funding

c = RCPA Private School Index factor — see table (minimum value 1.0)

### ALLOCATION CRITERIA

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

### 2008/2009 Private School Authorities — RCPA Index

jrcd	Authority	RCPA INDEX
9302	40-Mile Christian Education Society	1.011
9270	Airdrie Koinonia Christian School Society	1.058
9383	Alberta Charitable Society of St. Pius X	1.058
9382	Alberta Conference of 7th Day Adventist Church	1.025
9916	Association for Christian Schooling in Calgary South	1.058
0211	Aurora Learning Foundation Calgary	1.058
0210	Aurora Learning Foundation Edmonton	1.035
0062	Banbury Crossroads School	1.058
9106	Bearspaw Christian School Society	1.058
9407	Bethel Christian Academy Society	1.058
9272	Bosco Homes A Society For Children And Families	1.035
9632	Calgary French & International School Society	1.058
9795	Calgary Quest Children's Society	1.058
9224	Calgary Waldorf School Society	1.058
9112	Calvin Christian School Society of the Netherlands Reformed Congregations	1.000
9092	Canadian Reformed School Society of Edmonton	1.035
9078	Canadian Reformed School Society of Neerlandia	1.000

9024	Canadian University College	1.000
9294	Central Alberta Christian High School Society	1.000
9379	Clear Water Academy Foundation	1.058
9042	Coaldale Canadian Reformed School Society	1.000
9052	Concordia University College of Alberta	1.035
9147	Congregation House of Jacob - Mikveh Israel	1.058
9045	Cornerstone Christian School Society	1.011
9353	Delta West Academy Society	1.058
9127	Destiny Christian School Society	1.000
9319	Devon Christian School Society	1.035
0083	Eastside City Church	1.058
9352	Edison School Society	1.033
9172	Edmonton Academy Society for Learning Disabled	1.035
9269	Edmonton Islamic School Society	1.035
0116	Edmonton Khalsa School Educational Association	1.035
9263	Elves Special Needs Society	1.035
9343	Equilibrium International Education Foundation	1.058
9146	Evangelical Free Church of Champion, Alberta	1.020
9107	Foothills Academy Society	1.058
0107	Green Learning Academy	1.058
0118	Headway School Society of Alberta	1.035
9421	High Level Christian Education Society	1.069
9171	Hillcrest Christian School Society	1.066
0030	Independent Baptist Christian Education Society	1.035
9342	Inner City Youth Development Association	1.035
0161	International School of Excellence (ISE)	1.058
0025	Janus Academy Society	1.058
0207	Khalsa School Calgary Educational Foundation	1.058
9211	Koinonia Christian School - Red Deer Society	1.000
9312	Lakeland Christian School Society	1.001
9314	Lighthouse Christian School Society	1.000
9336	Living Waters Christian Academy	1.035
9173	Lycee Louis Pasteur Society	1.058
0212	Maria Montessori Education Centre Ltd.	1.058
9925	Montessori School of Calgary	1.058
9253	Morinville Christian Fellowship	1.035
0035	Mountain View Academy Society	1.058
9337	Muslim Community Foundation of Calgary	1.058
0077	New Heights Early Learning Services Society	1.058
9250	Newell Christian School Society	1.017
9328	Olds Mountain View Christian School Association	1.000
9027	Parkland Community Living and Supports Society	1.000

0175	Phoenix Home Education Foundation	1.058
9167	Ponoka Christian School Society	1.000
9225	Progressive Academy Education Society	1.035
9942	Providence Christian School Society	1.000
9672	Renfrew Educational Services Society	1.058
9071	River Valley School Society	1.058
9230	Rundle College Society	1.058
0072	Slave Lake Koinonia Christian School Society	1.055
9018	St. Matthew Evangelical Lutheran Church of Stony Plain, Alberta	1.035
9072	Strathcona-Tweedsmuir School	1.033
0213	Tanbridge Academy	1.058
9059	Tempo School	1.035
9633	The Calgary Jewish Academy	1.058
9131	The Calgary Society for Effective Education of Learning Disabled	1.058
9938	The Canadian Reformed School Society of Calgary	1.058
9256	The Cornerstone Christian Academy of Camrose	1.000
0074	The Edge School For Athletes Society	1.058
9365	The Edmonton Lutheran School Society	1.035
9025	The Lacombe Christian School Society	1.000
9254	The Rimbey Christian School Society	1.000
9022	The Rocky Christian School Society	1.024
9041	The Society for Christian Education in Southern Alberta	1.003
0040	The Timothy Centre for Scholarship Ltd.	1.058
0023	Third Academy International Ltd.	1.043
9946	Trinity Christian School Association	1.001
0016	Tween Valley Fellowship/Tween Valley Christian School	1.000
9346	Universal Educational Institute of Canada	1.035
9366	Victory Christian School Society	1.035
0015	Webber Academy Foundation	1.058
9140	West Island College Society of Alberta	1.058
0141	Yellowhead Koinonia Christian School Society	1.033

\*as per Accountability and Declaration Form 08AE3.0

NEW

## SECTION 3.12 — Plant Operations and Maintenance (Level 2\*)

### ALLOCATION FORMULA

$$\text{Plant Operations and Maintenance (POM) Allocation} = \left( \frac{\text{FTE Weighted Enrollment}}{\text{POM Rate}} \right)$$

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

Grades	Rate per Weighted FTE
1 – 6	\$530
7 – 9	\$500
10 – 12	\$503

\*as per Accountability and Declaration Form 08AE3.0



## PART 4 — Federal French Funding

### SECTION 4.1 — Federal Francophone Education (Francophone Regional Authorities)

#### ALLOCATION FORMULA

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

#### ALLOCATION CRITERIA

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

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

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

$$\begin{array}{lcl}
 \text{a) ECS to Grade 9} & = & \frac{\text{Funding Rate per FTE Funded Student}}{\left( \frac{\text{French Instructional Hours}}{950 \text{ hours per year}} \right)} \times \text{Number of Funded Students or ECS Children in the program} \\
 \text{b) Grade 10 to 12} & = & \frac{\text{Funding Rate per FTE Funded Student}}{\left( \frac{\text{French Instructional Hours}}{1000 \text{ hours per year}} \right)} \times \text{Number of Funded Students in the program}
 \end{array}$$

6. The following grant rates for 2008 – 2009 are provided as estimates for planning purposes only. Final grant rates will be confirmed once all enrollments for 2008 – 2009 are compiled.

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

## SECTION 4.2 — Federal French Language (School Authorities)

### ALLOCATION CRITERIA

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

PROGRAM	GRANT CODE	ESTIMATED RATE
Alternative French Language Program ECS to Grade 6	211	\$105 per FTE
Alternative French Language Program Grade 7 to 12	211	\$180 per FTE
FSL courses ECS to Grade 6/other courses*	230	\$65 per FTE
FSL courses Grade 7 to 12/other courses*	230	\$90 per FTE

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

## 8. a) ECS – Grade 9

$$\text{Funding Rate per FTE Funded Student} \times \frac{\text{Instructional hours per year}}{950 \text{ hours per year}} \times \left( \text{Number of Funded Students/Funded Children in the program} \right)$$

## b) Grade 10 – 12

$$\text{Funding Rate per FTE Funded Student} \times \frac{\text{Instructional hours per year}}{1,000 \text{ hours per year}} \times \left( \text{Number of Funded Students in the program} \right)$$

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

UPDATED

## PART 5 — Targeted Funding for Provincial Initiatives — Additional Funding

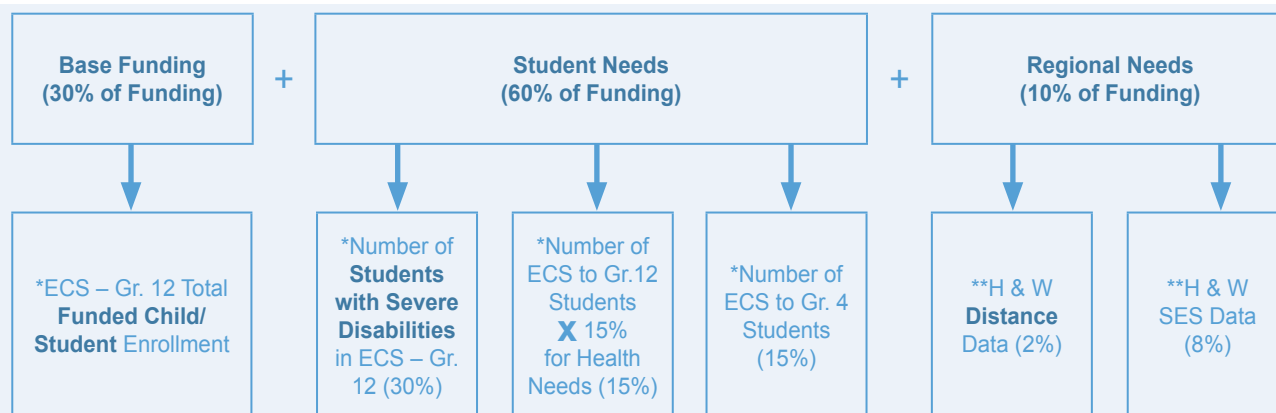
### SECTION 5.1 — Student Health (School Authorities)

#### ALLOCATION CRITERIA

UPDATED

1. Students/Children with special health needs includes those with physical disabilities, development disabilities, neurological disorders, sensory impairments, medical conditions, and/or emotional/behavioural disabilities who are registered in **school** programs from **Early Childhood Services (ECS)** through Grade 12. Services eligible for funding include speech-language therapy, physical therapy, occupational therapy, audiology, respiratory therapy, clinical nursing, and emotional/behavioural supports.
2. Alberta Education administers Student Health funding on behalf of the following provincial government partners – Alberta Education, Alberta Health and Wellness, and Alberta Children and Youth Services.
3. Student Health funding must be pooled and shared by the **Student Health Partnership** to provide students/children with identified special health needs with access to student health services. Students/children throughout the region must have equitable access to services regardless of their **school** program.
4. The Student Health funding allocation may only be accessed if, and when, the **school authority** joins a **Student Health Partnership**, and a Service Plan is submitted that is signed by the Chair of the Partnership on behalf of all the required partners.
5. Decisions on how the Student Health funding is to be utilized must be made jointly by the partners in the Student Health Partnership.
6. Alberta Education distributes Student Health funding for Student Health Partnerships through the “designated banker” **school board** identified by the Partnership to administer the Student Health funds on behalf of all partners.
7. Every **school year**, **Student Health Partnerships** must:
  - a) submit a Service Plan for approval
  - b) submit an Annual Report for the previous **school year** by November 30
  - c) identify a **school board** as a “designated banker” through which they will receive and distribute their funding.

#### STUDENT HEALTH FUNDING FORMULA



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

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

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

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

Funding for administration costs is included in the allocation.

## SECTION 5.2 — Francophone Student Health Services (Francophone Regional Authorities)

### ALLOCATION CRITERIA

1. This funding and the services provided are for students identified in 5.1 (1) and registered in francophone school programs.
2. Student Health funding is accessed by the Réseau provincial d'adaptation scolaire
3. Alberta Education administers Student Health funding.
4. Through the *Réseau*, Student Health funding must be pooled and shared provincially by the **Francophone Regional Authorities**.
5. The Student Health funding allocation may only be accessed by a **Francophone Regional authority** that is a member of the *Réseau*, once a Service Plan has been signed by all member **school board** Chairs, including the Chair of the *Réseau*'s "designated banker" **school board**; and submitted and approved.
6. Alberta Education distributes Student Health funding to the Réseau through the designated "banker" **school authority** to administer the Student Health funds on behalf of all partners.
7. Every **school year**, the *Réseau* must:
  - a) submit a Service Plan for approval by the Student Health Provincial Coordinator
  - b) submit an Annual Report for the previous **school year**, with all required components and documents
  - c) have a designated **Francophone Regional Authority** as a "banker" through which they will receive and distribute their funding.
8. The allocation of the Student Health funding to the *Réseau* is based primarily on a per student amount.
9. Funding for administration costs is not to exceed 4.5 % of the total allocation.

## SECTION 5.3 — Alberta Initiative for School Improvement (School Authorities)

### ALLOCATION CRITERIA

1. Funding is provided for projects that have been approved by the School Improvement Branch.
2. Alberta Education will approve multi-year projects up to a maximum of three years. If funding is not continued for a project, the **school authority** may submit a new project proposal to Alberta Education for the same or a lesser amount of funding.
3. The funding allocated each year to a **school authority**, is calculated by multiplying the AISI **rate** by the **FTE** enrollment on the **count date** of the previous **school year**.
4. Heritage Language Schools are not eligible for funding under this section.
5. The following conditions must be met for project approval:
  - a) the project plan must provide for sufficient professional development and administrative support;
  - b) funding may not be used for payment of bonuses or other types of incentives; and
  - c) funding may not be allocated on a per-student basis to **schools**.
6. Unexpended AISI funds may be transferred at the end of the AISI project to another existing or new AISI project.
7. **School authorities** may transfer funding among their projects as long as they remain within their total approved allocation.
8. 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.
9. 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.

### REFERENCES

AISI Web Site

Alberta Initiative for School Improvement (AISI) Handbook for Cycle 3, 2006-2009

## SECTION 5.4 — SuperNet Service (School Authorities)

### ALLOCATION CRITERIA

1. **School authorities** will receive SuperNet Service funding for each approved site that is connected to and using the SuperNet services obtained through the SuperNet vendor, Axia SuperNet Ltd.
2. **School authorities** must sign a Letter of Agreement with Axia SuperNet Ltd. for all SuperNet connected sites.
3. **School authorities** must apply for SuperNet Service funding by submitting a SuperNet Service funding application (Form 08AE5.4) to Alberta Education’s Stakeholder Technology Branch (STB) along with a copy of each Letter of Agreement, Schedule B and Attachment to Schedule B as soon as possible after the sites are connected to SuperNet services.

4. **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.
5. SuperNet Service funding is provided on the basis of approved connected sites and the monthly service cost. The funding amount is determined by multiplying the number of eligible connected sites by the monthly SuperNet rate.
6. SuperNet Service funding is paid retroactively to the service activation date if the funding application is received by March 31 of the current **school year**. Funding applications received after March 31 are not eligible for retroactive funding.
7. SuperNet Service funding is calculated on a monthly basis and provided for each approved site as follows:
  - a) **school jurisdictions** \$503.50 (100%)
  - b) **accredited funded private schools** \$302.10 (60%)
  - c) Private ECS operators \$251.75 (50%)  
(payment for connection after the 1<sup>st</sup> of the month will be pro-rated)
8. NETWORK HEAD-END AGGREGATION PROVISION  
 Alberta Education will provide additional SuperNet Service funding to a **school jurisdiction** network head-end location based on the following formula: Head End SuperNet Service Funding = \$503.50 x jurisdiction student population/average number of students per public jurisdiction (based on provincial student population counts at the end of each **school year**).
9. MULTIPLE STAKEHOLDER SHARED FACILITY AGREEMENTS  
 When different education stakeholders are sharing the same facility and each has their own local-area network infrastructure, they are eligible to have one stakeholder (transferring stakeholder) transfer their SuperNet Service funding allocation to the other stakeholder (receiving stakeholder). This can allow one stakeholder to obtain additional services from SuperNet and provide them to both stakeholders.  
 The procedures and considerations for this are as follows:
  - a) The transferring stakeholder must have their own local area network in the shared site or they are not eligible to receive SuperNet Service funding.
  - b) The transferring stakeholder will sign a transfer document provided by the STB that is valid for one year. They must continue to provide a new, signed document for each subsequent year.
  - c) The total amount of monthly SuperNet Service Funds paid to the receiving stakeholder must not exceed the total monthly contracted value of SuperNet services provided to that stakeholder by Axia SuperNet Ltd.
10. EXISTING HIGH-SPEED NETWORKING INFRASTRUCTURE PROVISION  
 Some **school authorities** already own and operate their own fibre-optic high-speed network connections between eligible SuperNet connectable sites. In this case they can claim SuperNet Service funding for these sites without an Axia SuperNet Ltd. contract for those sites given the following procedures and considerations:
  - a) This addendum applies to sites with qualifying network infrastructure installed prior to the initial SuperNet rollout only.
  - b) At least one site on the **school authority** owned network infrastructure must connect to SuperNet using an Axia SuperNet Ltd. contracted service.
  - c) The total amount of monthly SuperNet Service funds paid to the **school authority** must not exceed their number of eligible SuperNet sites multiplied by the eligible dollar amount per site; nor can the total amount of monthly SuperNet Service funding paid to the **school**

**authority** exceed the total monthly contracted value of SuperNet services to them by Axia SuperNet Ltd.

- d) The **school authority** owned infrastructure used to connect the sites together must be single mode fibre equal to or better than that used by the SuperNet build (contact STB for details). Proof of the fibre used must be provided to the STB (installation invoice, purchase invoice, or third-party engineering validation).

## SECTION 5.5 — Small Class Size Initiative (School Jurisdictions)

### ALLOCATION FORMULA

**School jurisdictions** will receive a 9% increase to their 2007 – 2008 class size funding allocation.

### ALLOCATION CRITERIA

1. For those jurisdictions that have already met the ACOL guidelines or are unable to hire teachers due to factors beyond their control, these funds can be used, with the prior approval of the **Minister**, for classroom/student supports. Under no circumstances can this funding be used to increase salary/benefit levels of jurisdiction staff, other than a provision for grid movement.
2. Some jurisdictions are already at, or below, some or all of the ACOL guidelines; however, the goal is for every jurisdiction across the province to reach the ACOL guidelines in all grade categories on a jurisdiction basis. **School jurisdictions** that are below the ACOL guidelines in any grade category have the flexibility to adjust their averages; however, these averages should not exceed the ACOL guidelines.
3. The Commission recognizes that some classes will be above and some below the guidelines due to individual circumstances. Not every classroom will reflect the ACOL guidelines, as the class size averages are calculated on a jurisdiction basis at the jurisdiction level.
4. **School jurisdictions** are required to post **jurisdiction** and **school** class size averages on their Web site by January 15 of each **school year** by grade category (K – 3, 4 – 6, 7 – 9, 10 – 12).

## SECTION 5.6 — Children and Youth with Complex Needs (School Authorities) (under review)

### ALLOCATION CRITERIA

1. This funding is provided to Regional Integrated Case Management Teams, who then determine on an individual case-by-case basis the amount of funding to be provided for each eligible child or youth. The following terms must be met for the Team to consider providing funding:
  - a) The child or youth:
    - i) is less than 20 years of age as of September 1 (there is no minimum age), and
    - ii) has one or more disabling conditions that severely impairs his/her ability to participate in daily activities at home, in **school** and in the community, and



- iii) requires extraordinary care and services from more than one ministry or service sector, and
    - iv) requires a high degree of service coordination because of the complexity of the variety and intensity of services required.
  - b) The local programs and services:
    - i) cannot or do not have sufficient resources to provide the combination and level of services the child requires, or
    - ii) are prevented by mandate/policy from providing the combination and level of services the child requires.
  - c) The local case managers, service providers and family/guardian:
    - i) have met to develop an integrated service plan, and
    - ii) have determined that all local resources have been exhausted, and
    - iii) have determined that an adequate integrated service plan cannot be fully developed locally, and
    - iv) have determined that without an adequate integrated service plan the child, youth, family or public will be at risk, and
    - v) agree that the child/youth should be referred for a Regional Integrated Case Management Team Review, and
    - vi) have determined that the child/youth has a guardian who is willing to participate in a review and in the development of an adequate integrated service plan.
2. Children and Youth with Complex Needs 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 support for the child or youth with complex needs and they must support local teams in developing integrated service plans and share accountability for results.
  3. The Children and Youth with Complex Needs funding allocation may only be accessed if, and when, the **school authority**, regional health authority and child and family services authority join a Regional Integrated Case Management Team, and a Terms of Reference has been submitted approved at the provincial level and signed by all the required partners of the Regional Integrated Case Management Team. The Terms of Reference must include roles and responsibilities for decisions regarding the use of the funding. (See Requirement 2.) The Terms of Reference must be updated annually and submitted for approval to the Provincial Coordinator by May 15, 2008.
  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, who meet the criteria for funding, 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 "designated banker" **school authority**.
  7. All other sources of funding for service delivery must be exhausted prior to accessing the Children and Youth with Complex Needs funding.
  8. 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**.

9. 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 (\$90,000) of funding for implementation of the team including a regional support coordinator.
  - b) Service Delivery Funding  
Service delivery funding is provided to each of the Regional Integrated Case Management Teams based on the region's percentage of the total provincial service delivery funding as follows
    - a) percentage of the total provincial population of children and youth age 0 to 19. Data is provided by Health and Wellness.
    - b) 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.
    - c) percentage of the total provincial number of children and youth receiving services under Family Supports for Children with Disabilities. Data is provided by Children and Youth Services.
    - d) 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.
    - e) Local Case Management  
Regional integrated case management teams are able to utilize up to 4.5% of their total yearly allocation for evidence based local case management, including training.
10. Annual reviews of the allocated funding will be conducted to review what regions have spent and to look at equity across regions. Allocations will be confirmed and adjusted in the subsequent year if necessary.

## REFERENCES

Management of Integrated Services for Children and Youth with Complex Needs and Their Families: Guidelines for Alberta Regional Teams

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

## PART 6 — Other Provincial Support Funding

### SECTION 6.1 — Education Programs in Institutions (EPI) (see approved institutions for 2008 – 09 on page 164)

#### ALLOCATION CRITERIA

1. Funding is provided for:
  - a) education programs for **resident students of the government** who reside in an **institution** or **group home**,
  - b) **day students** who attend an EPI that is approved for **day students**
2. **School authorities** must have approval from the Minister and a contract/agreement with Alberta Education to provide an education program to students in the **institution**.
3. **Institutional** funding will only be provided for eligible **resident students of the government** and **day students** who:
  - a) Are in the custody under the Corrections Act, the Corrections and Conditional Release Act (Canada), the Youth Criminal Justice Act (Canada) or the Youth Justice Act, and deemed by the **school jurisdiction** and Alberta Solicitor General staff to be unlikely to succeed in any other **school jurisdiction** education programs or
  - b) Are in the custody of the regional Child and Family Services Authority (CFSA) director or have a guardian appointed under the Child, Youth and Family Enhancement Act and reside in a **group home** or treatment centre and receive intensive treatment or
  - c) Require long term intensive medical care which can only be provided onsite at the hospital or
  - d) Are a **temporary resident** of a women's shelter and require protection from physical, psychological or sexual abuse.
4. **Students with severe disabilities** who have been placed by the health authority, Alberta Solicitor General or the regional CFSA in an **institution** will be funded through **institutional** funding and are not eligible for severe disabilities funding.
5. EPIs will be funded for a 10-month **school year**. Only EPIs in Young Offender Centres will be funded for a 12-month program.
6. **School authorities** with a contract or approval to provide an EPI are required to:
  - a) Ensure all eligible **institutional students** are registered with the grants code 550.
  - b) Submit a budget of reasonable costs using Form 08AE6.1 to the Special Programs Branch by May 15 for the following **school year**. EPIs are expected to stay within their approved budget.
  - c) Submit a letter for approval to the Special Programs Branch explaining the need for additional funds when requesting a significant change to a proposed or an approved budget.
  - d) Submit a statement of actual program costs and revenues using Form 08AE6.1 to School Finance Branch by October 17 of the following **school year**.
  - e) Ensure actual costs reflect significant increases or decreases in student enrollment.
  - f) Keep daily attendance records for all students.
  - g) Submit annually a School Profile Report form for the previous **school year** to the Special Programs Branch by October 17.

- h) Ensure that the EPI is of a comparable quality to other school programs provided by the **school authority** and is subject to the same level of planning, evaluating and reporting required by provincial and local policy.
- 7. For approval of a new EPI, contact Special Programs Branch. Documentation must be submitted by May 1 preceding the **school year** for which approval is being requested.
- 8. For students in Women's Shelter programs maintain confidentiality by withholding names and ASN but claim Base Instruction funding and report this revenue on budget and final cost forms.

## INSTRUCTIONS FOR COMPLETION OF 2008 – 2009 INSTITUTIONAL FUNDING APPLICATIONS

Two categories of EPIs:

- 1) Regular EPIs only have eligible **resident students of the government** and **day students**
- 2) Mixed EPIs have:
  - a) **resident students of the government** and/or
  - b) day students and
  - c) non-eligible students.

Non-eligible students are placed in an EPI by a:

- i) **school authority**
- ii) province other than Alberta or territory
- iii) First Nations band authority
- iv) agency or attend as a day student in an EPI that is not approved for **day students**.

## ALLOWABLE COSTS

### 1. Instructional Salary Costs

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

### 2. Supplies and Services Costs

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

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

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

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

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

- a) \$500 x the average number of **institutional students** to a maximum of:  
 21 to 50 students = \$20,000  
 51 to 100 students = \$40,000  
 Over 100 students = \$50,000  
 Mixed programs calculate costs based on **institutional students** only, (line D of the budget form) or
- b) Actual costs not exceeding the above formula.

## REVENUES:

Please list:

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

## AVERAGE NUMBER OF STUDENTS ENROLLED:

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

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

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

# SECTION 6.2 — Regional Educational Consulting Services

## ALLOCATION CRITERIA

- 1. **School authorities** may only access Regional Educational Consulting Services (RECS) for **funded students/children** who meet the criteria for one of the following special needs codes:  
 Code 41 – Severe Cognitive Disability  
 Code 43 – Severe Multiple Disability  
 Code 44 – Severe Physical or Medical Disability  
 Code 45 – Deafness  
 Code 46 – Blindness  
 Code 55 – Hearing Disability  
 Code 56 – Visual Disability
- 2. Francophone **school authorities** may access “Le Réseau provincial d’adaptation scolaire” for **funded students** meeting the criteria for any special education code/category.

3. Alberta Education will determine the funding allocation for each program based on provincial and regional needs.
4. The **school jurisdiction** designated by Alberta Education to provide regional consulting services will use RECS to provide the following services:
  - a) Consultation
  - b) In-Service
  - c) Assessment
5. A rate of \$50 per hour will be charged for services provided to **school authorities** during the 2008 – 2009 **school year**.
6. The funding allocation is comprised of two components:
  - a) The Base Operating funding is on-going permanent funding.
  - b) The Provincial Initiatives funding is not permanent and may be adjusted as provincial priorities change. **School jurisdictions** designated to provide Regional Educational Consulting Services will be informed by letter from the School Finance Branch by May 31 of their funding allocation from Alberta Education for the next **school year**.
7. The **school jurisdictions** designated to provide Regional Educational Consulting Services will submit a budget (Form 08AE6.2) to the Special Programs Branch by June 30, indicating projected expenditures and revenues for the services for the upcoming **school year**. **School jurisdictions** will be allowed to retain any surpluses to help offset future expenses or deficits. The budgeted expenditures shall not exceed the total revenues projected, including any surplus funds from previous years. Alberta Education will not fund any deficits.
8. The designated **school jurisdictions** will provide, to the School Finance Branch, a financial statement of the actual revenues and expenditures associated with the provision of services on or before November 30 of each year for the previous **school year**.
9. The designated **school jurisdictions** will provide an annual results report to the Special Programs Branch by November 30 for the previous **school year**.
10. Administration funding is included in the allocation.
11. The **school jurisdictions** designated by Alberta Education to provide regional assessment services are:
  - a) Grande Prairie School District #2357
  - b) Edmonton School District #7
  - c) Calgary School District #19
  - d) Greater North Central Francophone Education Region No. 2 (for **Francophone Regional Authorities** only) – Le Réseau provincial d'adaptation scolaire (see Section 9.1 for zone contacts and referrals)

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

### ALLOCATION FORMULA

# of students on count date

X

LR Rate

## ALLOCATION CRITERIA

1. The Learning Resources Credit Allocation (LRCA) covers 25% of a purchase and the **school jurisdiction** or accredited **private school** pays the remaining 75%, until the LRCA is fully utilized.
2. Unless requested otherwise the LRCA will be applied automatically against purchase orders until the full credit amount is used.
3. The 2008/2009 LRCA is valid for April 1, 2008 to March 31, 2009.
4. The 25% credit may be combined with the 10% Early Order Discount (EOD) for orders placed with the LRC. The EOD program runs from January 1 to May 15. See the LRC website for more information.
5. **School jurisdictions** and accredited **private schools** must show the amount of LRCA utilized as 'Provincial Revenue' and also as an expenditure on the Audited Financial Statements.

## SECTION 6.4 — Regional Consortium

### ALLOCATION FORMULA

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

### ALLOCATION CRITERIA

1. If the annual infrastructure expenses are less than the funding provided by Alberta Education, the consortium may transfer the surplus funds to the consortium program account. The consortium may utilize surplus funds for the delivery of professional development programs and services.
2. The consortium must ensure that it has sufficient funds in its Accumulated Surplus to cover any current year deficit.
3. Each consortium shall assign an agent **board** to provide financial services, including financial reporting, on behalf of the consortium.
4. The agent **board** will provide the consortium with completed Form 08AE6.4 which consists of a Statement of Revenues and Expenses, a Statement of Financial Position, Schedule 1 — Conditional Grant Program Revenues, Schedule 2 — Transfers to Other Consortia and the Certification page. The consortia shall submit their statements to the School Finance Branch by December 1. The consortia shall also submit to the School Improvement Branch by December 1, an annual report that provides program details and results achieved.
5. Alberta Education will provide infrastructure funding to a consortium through its agent as follows:  
70% – September  
30% – April  
The release of the scheduled April payment will be dependent upon the receipt of the prior **school year's** Statement of Revenues and Expenses.



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

## SECTION 6.5 — Debt Retirement (School Jurisdictions)

### ALLOCATION CRITERIA

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



f) Is in excess of debenture interest calculated at the following rates:

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

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

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

## Section 6.6 — Fort McMurray Allowance (FMA)

### Allocation Formula

$$\text{\$1,040 per month} \times \text{number of eligible full-time equivalent (FTE) employees}$$

### Allocation Criteria

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

NEW

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

### Allocation Formula

$$\$60,000 \text{ Base} + \left( \$57 \times \begin{array}{c} \# \text{ of Grade 10 – 12} \\ \text{Students}^* \end{array} \right)$$

### Allocation Criteria

1. School must have students enrolled in grades 10, 11 or 12.
2. Allocation is for 3 years: 2008 – 2009, 2009 – 2010 and 2010 – 2011.
3. \*Student count for all three years is based on the Grade 10 – 12 **Frozen Funded Head Count** from 2007 – 2008.

## Section 6.8 — Innovative Classroom Technology Funding (School Jurisdictions)

NEW

### Allocation Formula

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

### Allocation Criteria

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

### Reference

Innovative Classroom Technology

## PART 7 — Capital Funding

### SECTION 7.1 — School Facilities (School Jurisdictions)

#### ALLOCATION CRITERIA

1. **School jurisdictions** may receive capital funding for projects approved by Alberta Education for new and replacement schools, for preservation of existing school facilities, and for the construction of modular classrooms and re-location of portables.
2. **School jurisdictions** must submit their Three Year Capital Plan by May 1. The Capital Plan should identify projects in order of priority in three categories:
  - a) Leases
  - b) New and replacement school facilities
  - c) Preservation and upgrading of existing school facilities
3. Modular classroom requirements and the relocation of modular classrooms or portables may be requested separate from the Capital Plan Submission.
4. This funding cannot be used for any other purposes than that stated above.
5. The determination and allocation of this funding is currently under review. **School jurisdictions** will be informed of the funding details as they become available.

### SECTION 7.2 — Infrastructure Maintenance and Renewal (IMR) (School Jurisdictions)

#### ALLOCATION FORMULA

1. The IMR funding formula is based on the following components:
 

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

#### ALLOCATION CRITERIA

1. This funding may only be used for the purpose for which it is intended.
2. **School jurisdictions** may use the funding to:
  - a) ensure school facilities meet all regulatory requirements, particularly as they relate to providing a safe and healthy learning environment.
  - b) preserve and improve the quality of the learning environment by:
    - i) prolonging the life of the school facility through planned, proactive replacement of major components that have exceeded their life cycle and are due for failure in the near future, or that have failed.
    - ii) upgrading of the educational areas to meet program requirements.

- c) meet the requirements of students with special education needs.
  - d) replace or upgrade building components to improve energy conservation and efficiency to achieve cost savings as a result.
3. **School jurisdictions** will be advised of their allocation by School Finance Branch.

## PART 8 — Payments to School Authorities

### FUNDING RATES

#### SECTION 8.1 — School Jurisdictions

School Jurisdictions and Charter Schools Base Funding	2007 – 2008	2008 – 2009
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For 2008 – 2009, Funding rates were increased by 4.53%.

<b>ECS Base Instruction</b> (per funded child)	<b>\$2,725</b>	<b>\$2,848.50</b>
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#### Base Instruction Grades 1 – 12:

Grades 1 – 9 (per funded student)	<b>\$5,450</b>	<b>\$5,697</b>
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Grades 10 – 12 (per CEU)	<b>\$155.71</b>	<b>\$162.77</b>
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#### Outreach:

Amount per approved Outreach program	<b>\$55,724</b>	<b>\$58,249</b>
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UPDATED

#### Home Education (per eligible funded student)

Plus 50% of the cost of ADLC courses for Gr. 7 – 12 to a maximum of:	<b>\$1,363</b>	<b>\$1,425</b>
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Plus additional funding for Grades 1 – 6 ADLC courses	<b>\$1,363</b>	<b>\$1,425</b>
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Per formula – see Section 1.4

#### Additional Funding For Differential Cost Factors

<b>ECS Mild/Moderate Disability/Delay, Gifted and Talented</b> (per eligible funded child)	<b>\$2,308</b>	<b>\$2,413</b>
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#### ECS Program Unit

Maximum per eligible funded child	<b>\$23,262</b>	<b>\$24,316</b>
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Maximum for each additional funded child in a unit	<b>\$5,771</b>	<b>\$6,033</b>
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<b>Severe Disabilities</b> (per funded student based on severe profile)	<b>\$15,751</b>	<b>\$16,465</b>
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<b>English as a Second Language</b> (per eligible FTE funded child/student)	<b>\$1,093</b>	<b>\$1,143</b>
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<b>First Nations, Métis and Inuit Education</b> (per eligible FTE funded child/student)	<b>\$1,093</b>	<b>\$1,143</b>
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School Jurisdictions and Charter Schools Additional Funding For Differential Cost Factors			2007 – 2008	2008 – 2009
<b>Socio-Economic Status</b> (per eligible FTE funded child/student)			\$437	\$457
<b>Small Schools by Necessity: Base Allocation</b>				
Schools with ≤ 150 FTE funded child/students			\$81,979	\$85,693
Schools with > 150 but < 226 FTE funded child/students			sliding scale reducing to zero	
<b>Small Schools by Necessity: Variable Allocation</b>				
<b>School Type</b>	<b>Peak Enrollment</b>	<b>Enrollment Limit</b>		
K – 3	40	80	\$546	\$571
K – 6	80	150	\$1,531	\$1,601
K – 9	80	220	\$1,749	\$1,829
K – 12	80	290	\$2,733	\$2,857
<b>Intra-Jurisdiction Distance</b> (per km of eligible distance)			\$1.09	\$1.14
<b>Enrollment Growth:</b>				
Year-to-year growth:				
Growth rate > 4% (per FTE funded child/student)			\$591	\$618
Growth rate > 7% (per FTE funded child/student)			\$591	\$618
<b>Enrollment Decline:</b>				
Year-to-year decline:				
Decline rate > 1.5% (per FTE funded child/student)			\$3,989	\$4,170
Decline rate > 4% (per FTE funded child/student)			\$591	\$618
<b>Small Board Administration</b>				
Charter School (per school)			Per formula (see Section 1.20)	
School jurisdiction FTE funded enrollment < 2000			\$437,217	\$457,023
School jurisdiction FTE funded enrollment > 2000 < 3000			sliding scale reducing to zero	
<b>Northern Allowance</b>				
Lower Zone (per FTE funded enrollment)			\$437	\$457
Intermediate Zone (per FTE funded enrollment)			\$655	\$685
Upper Zone (per FTE funded enrollment)			\$984	\$1,029
<b>Relative Cost of Purchasing Goods and Services Adjustment (RCPA)</b>				
(20% of total Education funding except applicable exclusions)			per jurisdiction rate	
(47% of Transportation and Boarding funding)			per jurisdiction rate	
(75% of Plant Operations and Maintenance funding)			per jurisdiction rate	
<b>Francisation</b> (per eligible FTE funded child/student)			\$1,093	\$1,143

School Jurisdictions and Charter Schools Additional Funding For Differential Cost Factors	2007 – 2008	2008 – 2009
<b>Stabilization</b> (to ensure a <b>school jurisdiction</b> receives identical funding under new funding framework compared to the old framework)	<b>Allocation for 2007 – 2008 plus 4.53% + any enrollment adjustment</b>	
<b>Enhanced ESL/Francisation and Support Services for Immigrant Students</b> (per eligible <b>FTE funded child/student</b> )	<b>\$382</b>	<b>\$400</b>
<b>Hutterite Colony Schools</b> (per colony <b>school</b> )	<b>\$10,716</b>	<b>\$11,202</b>
<b>Daily Physical Activity</b> (per eligible Grades 1 – 9 <b>school</b> )	<b>\$1,051</b>	<b>\$1,099</b>
<b>Francophone Equivalency Access</b> (per eligible <b>funded student</b> )	<b>\$578</b>	<b>\$605</b>
<b>Targeted Funding for Provincial Priorities – Additional Funding</b>		
<b>Student Health</b> (funding increased by 6%)	per formula	
<b>Francophone Student Health Services</b> (funding increased by 6%)	per formula	
<b>Alberta Initiative for School Improvement (AISI)</b> (Maximum per registered <b>FTE child/student</b> )	<b>\$132</b>	<b>\$138</b>
<b>SuperNet Service Funding</b> (max. per month per approved site)	<b>\$503.50</b>	<b>\$503.50</b>
<b>Small Class Size Initiative Funding</b>	per formula	
<b>Children and Youth with Complex Needs (under Review)</b>	per formula	
<b>Other Provincial Support Funding</b>		
<b>Institutional Programs</b>	net cost of program for <b>eligible students</b>	
<b>Regional Educational Consulting Services</b>	as per approved allocation	
<b>Learning Resources Credit</b> (per registered student)	<b>\$11.43</b>	<b>\$11.95</b>
<b>Regional Consortium</b> (per consortium)	<b>\$178,282</b>	<b>\$186,359</b>
<b>CTS Evergreening</b>	<b>\$0.00</b>	per formula
<b>Innovative Classroom Technology</b> (per 2007 – 08 <b>Frozen Funded Head Count</b> )	<b>\$0.00</b>	<b>\$37</b>

NEW

NEW



**School Jurisdictions and Charter Schools  
Transportation Funding**

2007 – 2008

2008 – 2009

**Urban Transportation**

10,000 – 19,999 population (per <b>eligible passenger</b> )	\$584	\$611
20,000 – 29,999 population (per <b>eligible passenger</b> )	\$541	\$566
30,000 + population (per <b>eligible passenger</b> )	\$499	\$522
Special (per eligible <b>funded student with a disability</b> )	\$2,652	\$2,773
ECS Special (per round trip/eligible transported child – max. of 185 trips)	\$14.34	\$14.99
Weekend (per eligible <b>funded student</b> )	\$4,319	\$4,515
Boarding (per eligible <b>funded student</b> )	\$3,881	\$4,057
Inter-school Transportation Rates (per km for two-way <b>distance</b> between <b>schools</b> for eligible programs)	\$0.77	\$0.85

**Metro Urban Transportation**

Regular (per <b>expected eligible passenger</b> )	\$499	\$522
Special (per <b>funded student</b> based on severe profile)	\$2,652	\$2,773
ECS Special (per round trip/eligible transported child - max of 185 trips)	\$14.34	\$14.99

**Rural Transportation**

Regular	formula based using grid below	
Special (per eligible <b>funded student with a disability</b> )	\$5,306	\$5,547
ECS Special (per round trip/eligible transported child –max of 185 trips)	\$14.34	\$14.99
Weekend (per eligible <b>funded student</b> )	\$4,319	\$4,515
Interschool Transportation Rates (per km for two-way <b>distance</b> between <b>schools</b> for eligible programs)	\$0.77	\$0.85
Boarding (per eligible <b>funded student</b> )	\$3,881	\$4,057

**Fuel Price Contingency**

per formula

Distance (Km)	2.4 – 5.9	6 – 9.9	10 – 13.9	14 – 17.9	18 – 25.9	26 – 37.9	38+			
Rate	\$10.07	\$14.74	\$17.63	\$20.27	\$24.39	\$25.76	\$27.08			
Weighted Passengers	Density of Effective Transportation Service Area									
	0 – .29	.30 – .35	.36 – .57	.58 – .76	.77 – .95	.96 – 1.14	1.15 – 1.30	1.31 – 1.59	1.60 – 3.01	3.02+
0-700	\$617	\$705	\$767	\$783	\$790	\$805	\$937	\$1,047	\$1,415	\$1,652
701 -1400	\$617	\$682	\$757	\$775	\$780	\$796	\$917	\$1,028	\$1,285	\$1,652
1401 – 2100	\$617	\$674	\$752	\$767	\$770	\$790	\$910	\$1,016	\$1,242	\$1,652
2101 – 2800	\$617	\$639	\$747	\$755	\$748	\$787	\$882	\$1,011	\$1,106	\$1,575
2801 – 3500	\$617	\$636	\$728	\$745	\$746	\$782	\$825	\$928	-	-
3501 – 4200	\$617	\$628	\$700	\$734	\$737	\$773	\$818	\$906	-	-
4201 – 4900	\$611	\$617	\$656	\$675	\$734	\$773	\$812	-	-	-
4901 – 5600	\$611	\$611	\$618	\$628	\$628	\$718	\$802	-	-	-
5601 – 6300	\$611	\$611	\$611	\$628	\$628	\$655	-	-	-	-
6301 +	\$611	\$611	\$611	\$611	\$611	-	-	-	-	-

**Plant Operations & Maintenance Funding**

2007 – 2008

2008 – 2009

Gr. K – 6 (per <b>FTE funded child/student</b> ) per formula	\$724	\$757
Gr. 7 – 9 (per <b>FTE funded student</b> ) per formula	\$684	\$715
Gr. 10 – 12 (per <b>FTE funded student</b> ) per formula	\$687	\$719

## SECTION 8.2 — Private ECS Operators

### ECS Funding for Private ECS Operators and Accredited Funded Private Schools with ECS Programs

2007 – 2008

2008 – 2009

For the 2008 – 2009 school year, the funding rates have been increased by 4.53%.

<b>ECS Base Instruction Funding (per funded child)</b>	<b>\$2,725</b>	<b>\$2,848.50</b>
<b>Portable Classrooms for ECS Operators</b> (per month per portable plus GST)	<b>\$100</b>	<b>\$100</b>
<b>Mild to moderate, Gifted and Talented</b> (per eligible funded child)	<b>\$2,308</b>	<b>\$2,413</b>
<b>Program Unit Funding</b>		
Maximum per eligible funded child	<b>\$23,262</b>	<b>\$24,316</b>
Maximum for each additional funded child in a unit	<b>\$5,771</b>	<b>\$6,033</b>
<b>ECS Transportation – Regular</b> (per eligible transported child)	<b>\$499</b>	<b>\$522</b>
<b>ECS Transportation – Special education needs</b> (per round trip/eligible transported child - max of 185 trips)	<b>\$14.34</b>	<b>\$14.99</b>
<b>Plant Operations and Maintenance</b> (per funded child)	<b>\$362</b>	<b>\$379</b>
<b>ECS Administration</b> (percentage based on enrollments of <2000 FTE funded children)	<b>6% of ECS funding per section 2.7</b>	
<b>English as a Second Language (ESL)</b> (per eligible funded child)	<b>\$546.50</b>	<b>\$571.50</b>
<b>Enhanced ESL and Support Services for Immigrant Children</b> (per eligible funded child)	<b>\$191</b>	<b>\$200</b>
<b>Alberta Initiative for School Improvement (AISi)</b> (maximum per registered child)	<b>\$66</b>	<b>\$69</b>
<b>SuperNet Service Funding</b> (maximum per month per approved site)	<b>\$251.75</b>	<b>\$251.75</b>

## SECTION 8.3 — Accredited Funded Private Schools

UPDATED

Accredited Funded Private Schools Funding		2008 – 2009 Level 1*	2008 – 2009 Level 2*
For the 2008 – 2009 school year, the funding rates were increased by 4.53%.			
<b>Base Instruction Funding</b>			
Grades 1 – 9 (per funded student)		\$3,418	\$3,988
Grades 10 – 12 (per CEU – max of 60 CEUs per student per year)		\$97.66	\$113.94
<b>Designated Special Education Private Schools (DSEPS)</b>			
Instruction funding rate for students with a mild or moderate disability in a DSEPS whose parents consulted with their resident school board (110 code).		\$10,473	\$10,473
Instruction funding rate for students with a mild or moderate disability whose parents did not consult with their resident school board and for students with severe disabilities in a DSEPS.		\$6,523	\$6,523
<b>Severe Disabilities Funding</b> (per eligible funded student)		\$16,465	\$16,465
<b>Home Education</b> (per eligible funded student)		\$1,425	\$1,425
Plus 50% of the cost of ADL courses for Grades 7 – 12 to a maximum of:		\$1,425	\$1,425
Plus additional funding for Grades 1 – 6 ADL courses. See section 3.4		Per formula	
<b>Early Literacy</b> (per funded student in Grades 1 and 2)		\$155	\$155
<b>Daily Physical Activity</b> (per eligible Grades 1 – 9 school)		\$660	\$769
<b>Learning Resources Credit</b> (per registered student)		\$11.95	\$11.95
<b>English as a Second Language (ESL)</b> (per eligible FTE funded student)		\$686	\$800
<b>Enhanced ESL and Support Services for Immigrant Students</b> (per eligible FTE funded student)		\$240	\$280
<b>Institutional Programs</b>		net cost of program	
<b>Alberta Initiative for School Improvement (AISI)</b> (maximum per registered student)		\$83	\$96.60
<b>SuperNet Service Funding</b> (maximum per month per approved site)		\$302.10	\$352.45
<b>First Nations, Métis, and Inuit</b> (per FTE funded student)		\$0.00	\$800
<b>Northern Allowance</b> (per FTE funded student)	Lower Zone	\$0.00	\$320
	Intermediate Zone	\$0.00	\$480
	Upper Zone	\$0.00	\$720
<b>Plant Operations and Maintenance</b> (per FTE funded student)	Grade 1– 6	\$0.00	\$530
	Grade 7 – 9	\$0.00	\$500
	Grade 10 – 12	\$0.00	\$503
<b>Relative Cost of Purchasing Adjustment (RCPA)</b>		\$0.00	Per formula

\*per Accountability and Declaration Funding Form (form 08AE3.0)

Note: for ECS rates see Section 8.2.

NEW

NEW

NEW

NEW

## PAYMENT SCHEDULES

### SECTION 8.4 — School Jurisdictions

#### PART 1 – School Jurisdiction Funding

UPDATED

#### Sections 1.1 to 1.11, 1.13 to 1.33, 5.3, 5.5, 6.1, 6.2 and 6.6. to 6.8

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

#### Section 1.12 – Daily Physical Activity

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

#### Alberta School Foundation Fund (ASFF)

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

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

#### Payments

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

#### Payment Receipt Dates

Sept. 15, 2008	Jan. 15, 2009	Apr. 15, 2009	Aug. 17, 2009
Oct. 15, 2008	Feb. 16, 2009	May. 15, 2009	
Nov. 17, 2008	Mar. 13, 2009	Jun. 15, 2009	
Dec. 15, 2008	Mar. 31, 2009	Jul. 15, 2009	

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

Adjustments to payments based on estimates will be made when Alberta Education receives actual enrollment data.

In all cases, when funding is adjusted during the **school year**, the payment system will determine the amount owing to date, the advances previously paid, and the balance owing to adjust the allocation to the correct amount.

## PART 4 – Federal French Funding

### Sections 4.1 and 4.2

On approval of allocations	↔	100%
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## PART 5 – Provincial Priority Targeted Funding

### Section 5.1 Student Health, Section 5.2 Francophone Student Health Services

On approval of joint plan	↔	58.33% advance
March/April	↔	100% less previous payment

### Section 5.4 SuperNet Service Funding

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

### Section 5.6 Children and Youth with Complex Needs

Under Review

## PART 6 Other Provincial Support

### Section 6.4 Regional Consortium Funding

September	↔	70%
March/April*	↔	100% less previous payments

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

### Section 6.5 Debt Retirement

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

## SECTION 8.5 — Private ECS Operators

### PART 2 – Early Childhood Services (ECS) Funding

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

#### Sections 2.1, 2.2, 2.4 to 2.7 and 5.3.

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

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

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

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

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

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

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

September – <b>Designated Sp. Ed. ECS programs</b>	⇔	40% advance based on the previous year approved PUF budget amount.
Upon approval of written request to School Finance – <b>regular ECS programs</b>	⇔	up to 40% advance based on the previous year approved PUF budget amount or current year estimated budget.
Upon receipt of PUF application	⇔	70% less any previous amount
April	⇔	80% less previous payments
June	⇔	90% less previous payments
Upon approval of final costs	⇔	100% less previous payments

**Note:** With the approval of the Assistant Deputy Minister, Strategic Services, a March payment may be made up to 90% less previous payment.

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

**Sections 1.32 and 1.33 Transportation**

Payment is based on receipt and review of a transportation application

January	⇔	70% advance
April	⇔	100% less previous payments

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

On approval of allocations	⇔	100%
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**PART 5 – Provincial Priority Targeted Funding****Section 5.4 SuperNet Service Funding**

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

## SECTION 8.6 — Accredited Funded Private Schools

### PART 3 — Accredited Funded Private Schools Funding

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

UPDATED

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

Advance payments will be made based on 2007/2008 enrollments and course information and 2008/2009 rates.

All payments in January or later will be based on 2008/2009 enrollments.

September	↔	40% advance based on last year's enrollment
January	↔	58.33% less previous payment
March	↔	70% less previous payments
April	↔	100% less previous payments

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

#### Section 3.6 Daily Physical Activity

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

#### Section 3.1 Base Instruction (Grades 10 – 12)

September	↔	40% advance based on last year's CEUs
March	↔	70% less previous payment
August	↔	100% less previous payments

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

### PART 4 – Federal French Funding

#### Section 4.2 Federal French Language

On approval of allocations	↔	100%
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### PART 5 – Provincial Priority Funding

#### Section 5.4 SuperNet Service Funding

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



## PART 6 – Other Provincial Support

### Section 6.1 Institutional Programs and Resident Students of the Government

September	⇔	58.33% advance based on approved budget claim form
April	⇔	90% less previous payments
On approval of Final Costs claim form	⇔	100% of actual costs less previous payments

## SECTION 8.7 — Enrollment Counts

### PURPOSE

Enrollment counts are used to determine funding allocations for **school jurisdictions**, **accredited funded private schools** and **private ECS operators** and are based on information obtained from Client Relationship Services.

### CONDITIONS

1. All ECS children and all students in Grades 1 to 12 who are enrolled and attending a **school** on the **count date** of the **school year** will be counted at the **school** they are attending on that date. Enrollment records must be kept on file in the **school authority** or **school** that will substantiate the **count date** ECS child/student enrollment data submitted to Client Relationship Services. 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
  - a) who returned to **school** within 15 calendar days of the **count date** or
  - b) who was referred to the attendance board (letter on file)
3. A **school authority** may count a student who was physically in attendance at an **Institution** on the **count date** if the student was enrolled and in attendance with the **school authority** prior to the **count date** and returned to the **school** within 30 calendar days after the **count date**. In the event that a priority school conflict occurs, and if the requirements of Condition #3 are met, the decision will be made in favor of the **school authority**.
4. A **funded child/student** who was not physically in attendance in any **school authority** on the **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**.
5. **Funded children/students** who are receiving their education in a **home education program** provided by their **parents** will be counted by the supervising **associate board** or **associate accredited funded private school** where the student is enrolled on the **count date**.
6. **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.

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

#### **For Grades ECS to 9**

- Attendance Sheets for the months of September and October are required, along with any documentation indicating (if applicable) the date of the **funded child's/student's** last day of attending **school** and registration forms for new children/students.
- A PSC will always resolve in favor of an approved PUF child.
- If more than one school authority substantiates enrollment on the **count date**, the PSC will be resolved in favor of the authority that provided the most programming

#### **For Grades 10 to 12**

Instructional minutes for the first **term** (September through January) are required. These minutes should be based on the actual attendance of the **funded student** in all the courses that they were registered in the **school** during the first term. Note: Do not factor in second **term** class time.

In making its decision, School Finance will determine the priority **school** as follows:

- a) The **school** where the **funded child** was enrolled, and in attendance, on the **count date**;
- b) If the **funded child/student** was enrolled, and in attendance, in two or more **school authorities** on the **count date**:
  - i) The **school** delivering the majority of instructional minutes in the first **term** of the current **school year** would be deemed the priority **school**; or
  - ii) In situations where instructional minutes are the same for two **school authorities**, funding will be distributed at 50% of the Base Instruction rate applicable to each **school authority**.

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

UPDATED

#### **THE DECISION OF SCHOOL FINANCE IS FINAL.**

#### **10. Course conflicts (Grades 10 –12)**

A course conflict occurs when a regular senior high student has a **school** awarded mark reported by two **schools** in the same course, in the same semester and in the same **school year**. The **school** that delivered the most instructional minutes will be deemed the priority **school**. School Finance will identify these students in a turn-around report for **school authorities**.

To resolve these conflicts, the Course Conflict form must be completed and submitted to School Finance Branch by using the Funding Event System (FES) or by paper submissions. On this form, the **school** must indicate the number of actual instructional minutes delivered to the student. These minutes should be based on the total class time offered minus any class time absent. Do not default to total class time offered.

## PART 9 — Additional Information

### SECTION 9.1 — Information and Reporting Requirements

#### Accredited Funded Private Schools

NEW

1. To receive funding, an **accredited funded private school** must have seven or more full-time equivalent students enrolled from two or more families who continue to be enrolled in **school**. The seven or more full-time equivalent students must not include ECS children and students enrolled in home education programs or the percentage of a student's time for the home education portion of a **blended program**. The **accredited-funded private school** must notify the Director, Governance Support Branch if enrollment drops below seven full-time equivalent students or if enrollment does not come from two or more families.
2. An **accredited funded private school** accredited through the Governance Support Branch and approved by the **Minister** will be required to provide instruction to students for a minimum of one year before it is eligible for funding unless otherwise approved by the **Minister**.

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

**Level 2** – the accountabilities ascribed to this accredited funded private school authority will include accountabilities that are part of the provincial accountability program. Eligible funding allocations will be at level 2 funding rates as outlined in the *2008 – 2009 Funding Manual*.

#### AISI

1. **School authorities** must provide Alberta Initiative for School Improvement (AISi) reporting information according to the following timelines:
  - a) **October 15** – AISi Project Annual Report (APAR); AISi Project Final Report (APFR) in the final year of the project.
  - b) **November 30** – Annual Education Results Report includes a link on the jurisdiction Web site to the AISi Project Annual Report (APAR) as part of the Highlights for the previous **school year**.

#### BASE INSTRUCTION

1. All enrollment information must be submitted through Client Relationship services.
2. Base instruction funding is based on:
  - a) Student registration information in ECS and Grades 1 to 9 as of the **count date** that is submitted to Client Relationship Services by October 3;
  - b) Course completion information for students in Grades 10 to 12 as follows:
    - i) Student Information System for specific enrollment; and
    - ii) Student Records System/Course Information Database System (CIDS) for course marks;

3. The ages of all **funded students** and **funded children** must be determined as of September 1.

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

4. Adjustments to enrollment data:
  - a) If an adjustment is required to the enrollment data reported to Client Relationship Services on the **count date**, **school authorities** must ensure that changes are made to their modification file.
  - b) After receiving the first RACERS data set, any modification that will impact funding must be submitted using the “Add, Modify, Delete” form in the Funding Event System (FES) or using the paper form (Form 08AE1.2c), by the April 15 deadline.
5. Base Instruction funding for **funded students** attending **school** in another province will be based on:
  - a) a copy of the agreement under Section 62(2) of the *School Act*; and
  - b) a letter submitted to School Finance indicating the student’s name, birth date and grade and Alberta Student Number (ASN).
6. **School jurisdictions** must submit colony **schools** student registration information as of the **count date** to Client Relationship Services by October 3.
7. **HIGH SCHOOL**
  - a) Student information on Form 08AE1.2a for senior high students taking junior high courses.
  - b) To receive 35 **CEUs** of Base Instruction funding for **high school refugee students** (code 640), **school jurisdictions** must:
 

Have on file:

    - a refugee claim to the Immigration and Refugee Board (IRB) within the past year and
    - an Acknowledgement of Convention Refugee Claim

## CHARTER SCHOOLS

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

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

## DSEPS

1. Funding is only provided to **DSEPS** that have been approved by the **Minister**. To obtain approval for this status the **private school** must send a request in writing to the Director of Special Programs Branch, Alberta Education, by March 31 for the upcoming **school year**. The Director will review the request to determine if the operator meets or exceeds Alberta Education standards for special education programming and that students attending the **school** meet eligibility requirements for special education. The status of approved **DSEPS** may be reviewed and withdrawn at any time by Alberta Education.
2. No satellite campuses for existing **DSEPS** will be approved without written consent of the Director of Special Programs Branch. Requests for satellite campuses must be submitted by March 31.

## ECS (Early Childhood Services)

1. **Children with mild/moderate disabilities/delays** must be coded with a code 30 and **funded children** who are gifted and talented must be coded with a code 80. **School jurisdictions** must also include the grants code 500 on the electronic registration file or Alberta Education Student Registration Form to receive this funding.
2. **Funded children** who were enrolled in the program on the **count date** but were assessed as having mild to moderate disabilities/delays or identified gifted and talented after the **count date**, an “Add, Modify, Delete Form” (Form 08AE1.2c) must be completed and submitted to School Finance or the data may be submitted online using the Funding Event System (FES). The data should be submitted before April 30 to receive funding.
3. For **ECS programs** beginning after the **count date**, the count will be taken as of the last **operating day** in the month in which the **ECS program** begins. The information must be submitted within three days of that day to the Client Relationship Services.

UPDATED

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

## ESL

1. Student registration information for ECS to Grade 12 as of the **count date** of the current **school year** must be submitted to the Client Relationship Services Branch by October 3. This registration must include Canadian-born (code 303), Foreign-born (code 301) and unfunded (code 302) ESL students. This coding of ESL students is required for **school jurisdictions** to receive funding.
2. March 1 (excluding unfunded - code 302): Student registration for ECS to Grade 12, ESL Canadian-born (code 303) and Foreign-born (code 301), as of February 27 must be submitted to the Information Services Branch by March 4, 2009.

## FIRST NATIONS

Student information on Form 08AE1.2b for students attending First Nations **schools**.

## FRANCOPHONE

1. Francophone school authorities must submit student registration information as of the **count date** to the Information Services Branch by October 3.
2. Student registration information for ECS to Grade 12 as of the **count date** of the current **school year** must be submitted to the Information Services Branch by October 3. This registration will include Canadian-born (code 306) and Foreign-born (code 307) **Francisation** students. This coding of **francisation** students is required for **Francophone Regional Authorities** to receive funding.
3. March 1: Student registration for ECS to Grade 12, **Francisation** Canadian-born and Foreign-born, as of February 27 must be submitted to the Information Services Branch by March 4.
4. **Francophone Regional Authorities** cannot claim both **Francisation** funding and ESL funding for the same child.

## HOME EDUCATION

1. Home Education funding is based on:
  - a) student registration information in Grades 1 to 12 as of the **count date** that is reported to Client Relationship Services by the **submission date** (October 3); and
  - b) the application for reimbursement of ADL course costs for **home education students** in Grades 7 to 12 enrolled in courses at the ADLC (Form 08AE1.4a);
  - c) the application for additional ADL course costs for **home education students** in Grades 1 to 6 on enrolled in courses at the ADLC (Form 08AE1.4b).

## IMR

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

## OUTREACH

1. Applications for approval to begin new **outreach programs** in the following **school year** must be submitted by March 31 of the prior year to your Zone Services Branch Director using Form 08AE1.3. Alberta Education may not approve all applications.
2. Where an **outreach program** ceases to operate, the **board** must immediately notify the respective Zone Services Branch Director. Where the **outreach program** is operating as a **school** and the **school** is closing, the **board** must notify the **Minister** of the **school** closure as per the *Closure of School Regulation* AR 238/1997, as amended.

## PROGRAM UNIT FUNDING (PUF)

1. A PUF application must be submitted to Alberta Education by December 19. **School authorities** shall apply using the electronic PUF application on the Program Unit Funding System (PUFS). Small private ECS operators with less than 10 children may apply for PUF using the paper application form (Form 08AE1.6a).
2. **School jurisdictions** must report actual expenditures for PUF children using Form 08AE1.6b.
3. Private ECS operators must report actual expenditures for PUF children on the PUF schedule of the Audited Financial Statements, which are due November 30.

## REGIONAL EDUCATIONAL CONSULTING SERVICES

For referral information in the following zones, contact:

### ZONE 1 — C.A.S.E.

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



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

UPDATED

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

**ZONES 4, 5 and 6 REACH Services**

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

**Services for Francophone Authorities**

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

**SPECIAL NEEDS**

1. 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 140 code can only be used by **school jurisdictions**.
  - b) The providing/registering **school jurisdiction** will register the student using code 140 with the code 500, the appropriate special needs code, and the resident **school jurisdiction's school authority** code.
  - c) The code 140, ensures the student is included in the resident **school jurisdiction's count date** headcount and all related funding is provided by Alberta Education to the resident **school jurisdiction**. This ensures that the **resident school board** maintains responsibility for the student. No funding is provided by Alberta Education to the providing/registering **school jurisdiction**. Payment for a student's program is the responsibility of the resident **school jurisdiction**.
  - d) For **students with severe disabilities** with a 140 code, the resident **school jurisdiction's** severe disabilities profile number will not be adjusted; therefore the resident **school jurisdiction's** severe disabilities funding will remain unchanged.
  - e) The 140 code cannot be used with students coded as 110, 145, 600, or 610.
2. The **DSEPS** shall report all students enrolled on the **count date** in their **school** to Client Relationship Services by the **submission date** (October 3).

**TRANSPORTATION**

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

## SECTION 9.2 — Submission Deadlines and Forms

# Submission Deadlines and Forms



UPDATED

TITLE	SUMMARY OF FUNDING APPLICATION FORMS		
FORM NO.	FUNDING APPLICATION FORM	DUE DATE	RETURN TO
0AEDSA	Delegation of Signing Authority form	October 31, 2008	SF
08AE1.2a	Junior High Courses taken by senior High Students ( <b>School Jurisdictions</b> and Private Schools)	Upon Completion of Term/Course	SF
08AE1.2b	<b>Funded Students</b> Attending First Nations Schools	April 15, 2009	SF
08AE1.2c	Add, Modify, Delete Form for Enrollments	*April 15, 2009	SF
08AE1.2d	Declaration of Management for 2008 – 2009	January 30, 2009	SF
08AE1.3	Application to Operate a New <b>Outreach Program</b>	March 31, 2009	ZS
08AE1.4a	Application for Reimbursement of ADL Course Costs for <b>Home Education Students</b> in Grades 7 to 12.	May 29, 2009	SF
08AE1.4b	Funding Application for Additional ADL Course Costs for <b>Home Education Students</b> in Grades 1 to 6	**	SF
08AE1.6a	ECS Program Unit Funding Application	December 19, 2008	SF
08AE1.6b	ECS PUF Statement of Actual Expenditures	October 31, 2009	SF
Electronic Submission	Application Form – Rural Transportation	November 30, 2008	BOSS
	Application Form – Special Transportation and Boarding	November 30, 2008	BOSS
	Application Form – Urban Transportation	November 30, 2008	BOSS
	Application Form – ECS Transportation – Regular, Special, and <b>Family-Oriented Programming Sessions</b>	November 30, 2008	BOSS
08AE3.0	Accredited Funded Private School Authority Accountability and Funding Declaration	November 24, 2008	GS
08AE5.4	SuperNet Service Funding Application	***Upon Connection	STB
08AE6.1	<b>Institutional</b> Programs – Budget	May 15, 2008	SP
	– Final	October 16, 2009	SF
08AE6.2	Regional Educational Consulting Services (RECS) Budgeted Revenues and Expenditures	June 30, 2008	SP
08AE6.4	Regional Consortium Statement of Revenues and Expenses Regional Consortium Statement of Financial Position	December 1, 2008	SF

\* Or after receiving your first RACERS data.

\*\* After a full course load has been purchased for the home ed student.

\*\*\* By or before August 31, 2008

### IMPORTANT DEADLINES — 2008 – 2009 SCHOOL YEAR

Modifications to Enrollment and Transportation Information to School Finance	April 15, 2009
Resolution of Priority School Conflicts	April 30, 2009
Back-up documentation for Priority School Conflicts	May 15, 2009
Enrollment Verification Reports to School Finance	June 30, 2009
Course and Marks Submission or Modification to CRS	
Term 1	June 30, 2009
Term 2, 3, 4	November 15, 2009
Course and Module Conflicts and Students Not Enrolled on the Count Date	
All Terms	December 31, 2009

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

UPDATED GS = Governance Support

## DELEGATION OF SIGNING AUTHORITY FORM

### 2008 – 2009 School Year

This form is provided to allow the delegation of the Secretary-Treasurer's and/or Superintendent's signing authority to other individuals who are authorized by the **school board** to sign Alberta Education funding applications on behalf of the Secretary-Treasurer/Superintendent. In order for the delegation of authority to continue, this form must be submitted each year – even if there are no additions or deletions.

**School Authority Name:** \_\_\_\_\_

**School Authority Code:** \_\_\_\_\_

NAME (S) (Please Print)	SIGNATURES

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

\_\_\_\_\_  
Secretary – Treasurer

\_\_\_\_\_  
Date

## JUNIOR HIGH COURSES TAKEN BY SENIOR HIGH STUDENTS

**2008 – 2009 School Year**

Name of School Jurisdiction or Private School: \_\_\_\_\_ Authority Code: \_\_\_\_\_

Name of School: \_\_\_\_\_ School Code: \_\_\_\_\_

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

**COMPLETION DATE**

☐ September 1 to March 1

☐ March 2 to June 30

☐ July 1 to August 31  
(Summer School Only)

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

### CERTIFICATION

I certify the information reported on this form is correct.

\_\_\_\_\_  
(Signature of: Secretary-Treasurer/Superintendent)      (Signature of: Teacher/Principal)      (Date)

## FUNDED STUDENTS ATTENDING FIRST NATIONS SCHOOLS ON A RESERVE

## 2008 – 2009 School Year

**School Authority Name:** \_\_\_\_\_

**School Authority Code:** \_\_\_\_\_

[illegible]

## CERTIFICATION

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

---

Secretary – Treasurer

---

Date

# BASE INSTRUCTION ADD, MODIFY, DELETE FORM FOR ENROLLMENTS ON SEPTEMBER 28, 2009

## 2008 – 2009 SCHOOL YEAR

Authority Code: \_\_\_\_\_ Authority Name: \_\_\_\_\_

School Code: \_\_\_\_\_ School Name: \_\_\_\_\_

Action: \_\_\_\_\_ Registration: \_\_\_\_\_ Grade: \_\_\_\_\_ Enrollment Date: \_\_\_\_\_  
 Local School  
 ASN: \_\_\_\_\_ board ID: \_\_\_\_\_ Citizenship: \_\_\_\_\_ Expiry Date: \_\_\_\_\_  
 Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ Sec.23 Eligibility: \_\_\_\_\_ French Hours: \_\_\_\_\_  
 AKA First  
 AKA Last Name: \_\_\_\_\_ Name: \_\_\_\_\_ Reg. Entry Status: \_\_\_\_\_ Resident Juris: \_\_\_\_\_  
 Birth Date: \_\_\_\_\_ Gender: \_\_\_\_\_ Exit Date: \_\_\_\_\_  
 Address Line 1: \_\_\_\_\_ Special education needs: 1 \_\_\_\_\_ 2 \_\_\_\_\_  
 Address Line 2: \_\_\_\_\_ Enrollment Type: 1 \_\_\_\_\_ 2 \_\_\_\_\_ 3 \_\_\_\_\_  
 City: \_\_\_\_\_ Province: \_\_\_\_\_ Grant Codes: 1 \_\_\_\_\_ 2 \_\_\_\_\_ 3 \_\_\_\_\_  
 Postal Code: \_\_\_\_\_ Phone: \_\_\_\_\_

See Reverse for Legend

Comments: \_\_\_\_\_ Blended Home  
 Percentage of Program  
 at School

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

## CERTIFICATION

I certify the information reported on this form is correct.

(Signature of: Secretary-Treasurer/Superintendent)

(Signature of: Teacher/Principal)

(Date)

## Legend

<b>Action:</b>	(A) Add, (M) Modify, (D) Delete
<b>ASN:</b>	Alberta Student Number –assigned by Alberta Education (9- Digits)
<b>Last/First Name:</b>	Student Name
<b>Local Board ID:</b>	The number assigned by the school or <b>school authority</b> for internal tracking (if applicable)
<b>Gender:</b>	(M) Male, (F) Female
<b>Birth Date:</b>	Year, Month, Day (YYYY, MM, DD)
<b>Enrollment Type:</b>	Refer to Code Table in Student Information System User's Guide
<b>Grant Codes:</b>	Refer to Code Table in Student Information System User's Guide
<b>Grade:</b>	(EC) Early Childhood, (01) grade 1, (02) grade 2, etc. (UG) ungraded
<b>Registration:</b>	(D) Day, (E) Evening, (S) Summer
<b>Resident Juris:</b>	Enter the <b>school jurisdiction</b> code for the resident <b>school jurisdiction</b> . This field applies to: <ul style="list-style-type: none"> <li>a) <b>Designated Special Education Private Schools</b> (Code 110). For students who's <b>parents</b> consulted with their resident <b>school jurisdiction</b> prior to enrollment in the Designated Special Education Private School.</li> <li>b) Francophone students in a non-Francophone jurisdiction (Code 145)</li> </ul> Students under an Education Services Agreement (sponsorship) (Code 140)
<b>Special education needs:</b>	The following codes are for students and ECS children with special education needs. For funding purposes they should also be coded with the 500 Grants Program code.

### Severely Disabled (Grades ECS – 12)

- (41) Severe Cognitive Disability
- (42) Severe Emotional/Behavioural Disability
- (43) Severe Multiple Disability
- (44) Severe Physical or Medical Disability
- (45) Deafness
- (46) Blindness
- (47) Severe Delay Involving Language  
(ECS children only)

### Other

- (10) **Developmentally Immature**  
(ECS only, do not use 500 code)
- (80) Gifted/Talented (ECS – Grade 12)

### Mildly or Moderately Disabled

- (30) ECS Mild/moderate Disability/Delay

### Grades 1 – 12

- (51) Mild Cognitive Disability
- (52) Moderate Cognitive Disability
- (53) Emotional/Behavioural Disability
- (54) Learning Disability (All LD Students)
- (55) Hearing Disability. Hard of hearing.
- (56) Visual Disability
- (57) Communication Disability
- (58) Physical or Medical Disability
- (59) Multiple Disability

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

**Enrollment Date:** Year, Month, Day (YYYY, MM, DD)

## DECLARATION OF MANAGEMENT

### 2008 – 2009 SCHOOL YEAR

School Authority Name: \_\_\_\_\_

School Authority Code: \_\_\_\_\_

"As the Superintendent and Secretary-Treasurer, we certify that the Credit Enrollment Units (**CEUs**) submitted by the jurisdiction are complete, accurate and do not contravene, either directly or indirectly, the funding requirements for **CEU** funding as outlined in Alberta Education's *Funding Manual for School Authorities*."

TITLE	SIGNATURES	DATE
Superintendent		
Secretary Treasurer		

## APPLICATION TO OPERATE A NEW OUTREACH PROGRAM

An **outreach program** is a program offered by a school to provide a basic education for **funded students** who are unable to attend or benefit from a regular school program. For the program requirements, refer to *Outreach Programs Handbook*

**School Jurisdiction:** \_\_\_\_\_  
Name and Code of **School Jurisdiction**

**Superintendent:** \_\_\_\_\_

**Name of Outreach Program:** \_\_\_\_\_

**Grades Offered:** \_\_\_\_\_

**Principal Responsible for Outreach Program:** \_\_\_\_\_

**Will the program require a school code:** ☐ Yes ☐ No (please check one)

**If NO:** \_\_\_\_\_  
Name and Code of School Offering **Outreach Program**

**Telephone Number of Outreach Program:** (\_\_\_\_) \_\_\_\_\_

**Fax Number of Outreach Program:** (\_\_\_\_) \_\_\_\_\_

**Physical Location of Outreach Program (Address):** \_\_\_\_\_

\_\_\_\_\_

**Mailing Address (if different from address above):** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**School boards** intending to offer an **outreach program** must identify a stand-alone facility for each program. **School 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 **school board** policy regarding **outreach programs** must be attached to this form. **School board** policy must be consistent with conditions as outlined in the Funding Manual for School Authorities, (Section 1.3) and the **Outreach Program Handbook**.



## Outreach Program Description

### Rationale for the Outreach Program Application:

Note: Prior to making an application superintendents should consider how they might meet the needs of these students through existing funding sources, modifications to existing school programs, and partnerships with other **school jurisdictions** and community service agencies.

**Please provide the following information to complete your application and attach a program plan.**

1. Describe the unique needs of the student population that the program will serve and the grade levels offered.
2. How will the program serve students who could not be served at a traditional school setting? Describe the type of programming that would be offered, such as Alberta **Distance Learning (ADL)** courses and the method of evaluation that will be used for students and for the program.
3. What connections has the program made or is the program planning to make with other service organizations to demonstrate and enhance community support and involvement for the program?
4. What additional supports will be offered to assist these students in becoming successful community members (e.g., counseling; anger management, time management, etc.)?
5. How far away is the program located from another **outreach program**?

6. Does the jurisdiction offer other **outreach programs**? If so, please provide the name(s) of the other **outreach program(s)**.
  
  
  
  
  
  
  
  
  
  
7. What is the potential to partner with another jurisdiction to offer the **outreach program**?
  
  
  
  
  
  
  
  
  
  
8. Has the **school board** passed a motion to establish an **outreach program** and developed a policy for the **outreach program** (please attach a copy of the **school board** motion and the policy)?
  
  
  
  
  
  
  
  
  
  
9. Describe and name the stand-alone facility in which the **outreach program** will be located. Attach a health and safety inspection or indicate when these will be completed.

**Note: Alberta Education will not automatically approve all applications for new Outreach Programs. The applicant must clearly establish that:**

- 1) **The jurisdiction has a reasonable number of students with extraordinary needs, and;**
- 2) **The only reasonable way to meet these needs is through establishment of an Outreach Program.**

Please also note that a Field Services manager will conduct an on-site visit to confirm the implementation of the approved program.

For further information about establishing an **outreach program**, please refer to the *Outreach Programs Handbook* (<http://www.education.gov.ab.ca/educationsystem/OutreachProgHandbook.pdf>)

## DECLARATION:

I declare this program will be offered in accordance with the requirements identified in the *Funding Manual for School Authorities* and the *Policy, Regulations and Forms Manual*.

\_\_\_\_\_  
Superintendent

\_\_\_\_\_  
Date

## RECOMMENDED FOR APPROVAL:

\_\_\_\_\_  
Reviewer (Education Manager)

\_\_\_\_\_  
Date

## APPROVAL FOR OUTREACH PROGRAM:

\_\_\_\_\_  
Director

\_\_\_\_\_  
Date

Submit to: Zone Services Branch, Alberta Education, 9<sup>th</sup> Floor East, 44 Capital Boulevard, 10044 – 108 Street, Edmonton, Alberta, T5J 5E6

# APPLICATION FOR REIMBURSEMENT OF ADL COURSE COSTS FOR HOME EDUCATION STUDENTS IN GRADES 7 TO 12

## 2008 – 2009 SCHOOL YEAR

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

Name of School Jurisdiction or Private School: \_\_\_\_\_ Authority Code: \_\_\_\_\_

Name of School: \_\_\_\_\_ School Code: \_\_\_\_\_

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

Please refer to the attached course legend for approved ADL course costs.

Note: Approved ADL course costs will be reimbursed at 50% to a maximum of \$1,425 per student.

## CERTIFICATION

I certify the information reported on this form is correct.

\_\_\_\_\_  
(Signature of: Secretary-Treasurer/Superintendent)      (Signature of: Teacher/Principal)      (Date)

## Alberta Distance Learning Centre Print Course Costs

Approved for Reimbursement By Alberta Education

*Reimbursement will be at 50% of the Approved ADL Course Costs Column*

Grade	Course Code	ADL Course	Tuition Fee	Lesson Materials and Required Resources	Approved ADL Course Costs
Grade 7	7100	Language Arts 7	\$130.00	\$120.00	\$250.00
	7110	Mathematics 7	\$130.00	\$95.00	\$225.00
	7130	Health & Personal Life Skills 7	\$130.00	\$65.00	\$195.00
	7140	Science 7	\$130.00	\$130.00	\$260.00
	7150	Social Studies 7	\$130.00	\$100.00	\$230.00
	7160	Physical Education 7	\$100.00	\$85.00	\$185.00
	7210	Mathematics 7 Modified	\$130.00	\$85.00	\$215.00
	7310	Art A	\$100.00	\$40.00	\$140.00
	7410	Music A	\$100.00	\$85.00	\$185.00
	7570	Environmental and Outdoor Education	\$100.00	\$95.00	\$195.00
Grade 8	8100	Language Arts 8	\$130.00	\$120.00	\$250.00
	8110	Mathematics 8	\$130.00	\$85.00	\$215.00
	8140	Science 8	\$130.00	\$125.00	\$255.00
	8150	Social Studies 8	\$130.00	\$100.00	\$230.00
	8160	Physical Education 8	\$100.00	\$85.00	\$185.00
	8210	Mathematics 8 Modified	\$130.00	\$85.00	\$215.00
	8310	Art B	\$100.00	\$40.00	\$140.00
Grade 9	9100	Language Arts 9	\$130.00	\$120.00	\$250.00
	9110	Mathematics 9	\$130.00	\$85.00	\$215.00
	9140	Science 9	\$130.00	\$120.00	\$250.00
	9150	Social Studies 9	\$130.00	\$130.00	\$260.00
	9160	Physical Education 9	\$100.00	\$85.00	\$185.00
	9210	Mathematics 9 Modified	\$130.00	\$85.00	\$215.00
	9310	Art C	\$100.00	\$40.00	\$140.00

## Alberta Distance Learning Centre Print Course Costs

Approved for Reimbursement By Alberta Education

*Reimbursement will be at 50% of the Approved ADL Course Costs Column*

Grade	Course Code	ADL Course	Tuition Fee	Lesson Materials and Required Resources	Approved ADL Course Costs
<b>Grades 10, 11, and 12</b>	AGR1010	Agriculture 1010	\$26.00	\$35.00	\$61.00
	AGR1060	Agriculture 1060	\$26.00	\$35.00	\$61.00
	AGR1110	Agriculture 1110	\$26.00	\$35.00	\$61.00
	CMH1010	Family Dynamics	\$26.00	\$35.00	\$61.00
	CMH1050	Child Development	\$26.00	\$35.00	\$61.00
	CMH1060	Home Care 1	\$26.00	\$35.00	\$61.00
	CMH2010	Adolescent Health Issues	\$26.00	\$35.00	\$61.00
	CMH2030	Community Volunteerism	\$26.00	\$35.00	\$61.00
	CMH3010	Family Issues	\$26.00	\$35.00	\$61.00
	CMH3020	Parenting	\$26.00	\$35.00	\$61.00
	CMH3030	Aging	\$26.00	\$35.00	\$61.00
	CMH3040	Prenatal and Postnatal Care	\$26.00	\$35.00	\$61.00
	CMH3140	Perspectives on Marriage	\$26.00	\$35.00	\$61.00
	COM1020	Media and You	\$26.00	\$35.00	\$61.00
	CTR1010	Job Preparation	\$26.00	\$35.00	\$61.00
	CTR1210	Personal Safety Management	\$26.00	\$35.00	\$61.00
	CTR2210	Workplace Safety Practices	\$26.00	\$35.00	\$61.00
	DES1010	Sketch, Draw, and Model	\$26.00	\$35.00	\$61.00
	DES1020	The Design Process	\$26.00	\$35.00	\$61.00
	DES1060	Drafting and Design	\$26.00	\$35.00	\$61.00
	DES2010	2D Design Applications	\$26.00	\$35.00	\$61.00
	ELA1104	English 10-2	\$130.00	\$125.00	\$255.00
	ELA1105	English 10-1	\$130.00	\$135.00	\$265.00
	ELA2104	English 20-2	\$130.00	\$125.00	\$255.00
	ELA2105	English 20-1	\$130.00	\$137.00	\$267.00
	ELA3104	English 30-2	\$130.00	\$145.00	\$275.00
	ELA3105	English 30-1	\$130.00	\$155.00	\$285.00

## Alberta Distance Learning Centre Print Course Costs

Approved for Reimbursement By Alberta Education

*Reimbursement will be at 50% of the Approved ADL Course Costs Column*

Grade	Course Code	ADL Course	Tuition Fee	Lesson Materials and Required Resources	Approved ADL Course Costs
<b>Grades 10, 11, and 12</b>	ELT1010	Electro-Assembly 1	\$26.00	\$75.00	\$101.00
	ESL1121	English as a Second Language 10, Level 2	\$130.00	\$75.00	\$205.00
	FAS1030	Ready, Set, Sew!	\$26.00	\$35.00	\$61.00
	FAS1040	Fashion Basics	\$26.00	\$35.00	\$61.00
	FAS1050	Repair and Recycle	\$26.00	\$35.00	\$61.00
	FAS1060	Creating Accessories 1	\$26.00	\$35.00	\$61.00
	FAS1070	Creative Yarns / Textiles	\$26.00	\$35.00	\$61.00
	FAS2070	Creative Construction	\$26.00	\$35.00	\$61.00
	FAS2080	Activewear	\$26.00	\$35.00	\$61.00
	FAS2090	Specialty Fabrics 1	\$26.00	\$35.00	\$61.00
	FAS2110	Creating Home Decor	\$26.00	\$35.00	\$61.00
	FIN1010	Financial Information	\$26.00	\$35.00	\$61.00
	FIN1020	Service Business 1	\$26.00	\$35.00	\$61.00
	FIN1030	Service Business 2	\$26.00	\$35.00	\$61.00
	FIN2010	Taxation	\$26.00	\$35.00	\$61.00
	FIN2020	Merchandising Business 1	\$26.00	\$35.00	\$61.00
	FIN2030	Merchandising Business 2	\$26.00	\$35.00	\$61.00
	FIN3010	Advanced Accounting	\$26.00	\$35.00	\$61.00
	FIN3020	Management Accounting	\$26.00	\$35.00	\$61.00
	FIN3030	Business Organizations	\$26.00	\$35.00	\$61.00
	FIN3040	Financial Statements	\$26.00	\$35.00	\$61.00
	FIN3060	Financial Analysis	\$26.00	\$35.00	\$61.00
	FNA1400	Art 10 – 3 Credits	\$78.00	\$30.00	\$108.00
		Art 10 – 4 Credits	\$104.00	\$40.00	\$144.00
		Art 10 – 5 Credits	\$130.00	\$40.00	\$170.00
	FNA1405	Art 11	\$130.00	\$90.00	\$220.00
	FNA2400	Art 20	\$130.00	\$65.00	\$195.00

# **Alberta Distance Learning Centre Print Course Costs**

Approved for Reimbursement By Alberta Education

*Reimbursement will be at 50% of the Approved ADL Course Costs Column*

Grade	Course Code	ADL Course	Tuition Fee	Lesson Materials and Required Resources	Approved ADL Course Costs
<b>Grades 10, 11, and 12</b>	FNA2405	Art 21	\$130.00	\$90.00	\$220.00
	FNA3400	Art 30	\$130.00	\$70.00	\$200.00
	FNA3405	Art 31	\$130.00	\$90.00	\$220.00
	FOR1010	Why Forestry?	\$26.00	\$35.00	\$61.00
	FOR1090	Forest Ecology 1	\$26.00	\$35.00	\$61.00
	FOR2010	Making a Difference	\$26.00	\$35.00	\$61.00
	FSL1305	French 13	\$130.00	\$155.00	\$285.00
	FSL1309	French 10	\$130.00	\$125.00	\$255.00
	FSL2309	French 20	\$130.00	\$87.00	\$217.00
	FSL3309	French 30	\$130.00	\$87.00	\$217.00
	GER1315	German Language and Culture 10	\$130.00	\$142.00	\$272.00
	GER2315	German Language and Culture 20	\$130.00	\$142.00	\$272.00
	GER3315	German 30	\$130.00	\$55.00	\$185.00
	INF1020	Keyboarding 1	\$26.00	\$55.00	\$81.00
	INF2030	Keyboarding 2	\$26.00	\$55.00	\$81.00
	INF2040	Keyboarding 3	\$26.00	\$55.00	\$81.00
	INF3030	Keyboarding 4	\$26.00	\$55.00	\$81.00
	INF3040	Keyboarding 5	\$26.00	\$55.00	\$81.00
	INF3050	Keyboarding 6	\$26.00	\$55.00	\$81.00
	LDC1460	Religious Studies 15	\$130.00	\$95.00	\$225.00
	LDC2460	Religious Studies 25	\$130.00	\$95.00	\$225.00
	LDC2754	Forensic Science 25	\$78.00	\$55.00	\$133.00
	LDC3164	Abnormal Psychology 35	\$78.00	\$60.00	\$138.00
	LDC3460	Religious Studies 35	\$130.00	\$95.00	\$225.00
	LDC3754	Forensic Science 35	\$78.00	\$55.00	\$133.00
	LGS1010	You and the Law 1	\$26.00	\$35.00	\$61.00



## Alberta Distance Learning Centre Print Course Costs

Approved for Reimbursement By Alberta Education

*Reimbursement will be at 50% of the Approved ADL Course Costs Column*

Grade	Course Code	ADL Course	Tuition Fee	Lesson Materials and Required Resources	Approved ADL Course Costs
<b>Grades 10, 11, and 12</b>	LGS1020	You and the Law 2	\$26.00	\$55.00	\$81.00
	LGS2010	Family Law	\$26.00	\$55.00	\$81.00
	LGS2020	Labour Law	\$26.00	\$55.00	\$81.00
	LGS2030	Environmental Law	\$26.00	\$55.00	\$81.00
	LGS3010	Consumer and Property Law	\$26.00	\$55.00	\$81.00
	LGS3040	Negligence	\$26.00	\$55.00	\$81.00
	LGS3050	Law and Small Business	\$26.00	\$35.00	\$61.00
	LGS3080	Criminal Law	\$26.00	\$55.00	\$81.00
	MAM3010	The Business Organization	\$26.00	\$35.00	\$61.00
	MAM3020	Business in the Canadian Economy	\$26.00	\$35.00	\$61.00
	MAM3030	Business in the Global Marketplace	\$26.00	\$35.00	\$61.00
	MAM3040	Promotion: Sales Techniques	\$26.00	\$35.00	\$61.00
	MAM3050	Distributing Goods and Services	\$26.00	\$35.00	\$61.00
	MAT1037	Pure Mathematics 10	\$130.00	\$105.00	\$235.00
	MAT1038	Applied Mathematics 10	\$130.00	\$105.00	\$235.00
	MAT1041	Mathematics Preparation 10	\$130.00	\$85.00	\$215.00
	MAT1225	Mathematics 14	\$130.00	\$100.00	\$230.00
	MAT2037	Pure Mathematics 20	\$130.00	\$105.00	\$235.00
	MAT2038	Applied Mathematics 20	\$130.00	\$105.00	\$235.00
	MAT2225	Mathematics 24	\$130.00	\$100.00	\$230.00
	MAT3037	Pure Mathematics 30	\$130.00	\$105.00	\$235.00
	MAT3038	Applied Mathematics 30	\$130.00	\$105.00	\$235.00
	MAT3211	Mathematics 31	\$130.00	\$85.00	\$215.00
	MEC1040	Engine Fundamentals	\$26.00	\$35.00	\$61.00
	PED1445	Physical Education 10 – 3 credits	\$78.00	\$45.00	\$123.00
		Physical Education 10 – 5 credits	\$130.00	\$45.00	\$175.00

## Alberta Distance Learning Centre Print Course Costs

Approved for Reimbursement By Alberta Education

*Reimbursement will be at 50% of the Approved ADL Course Costs Column*

Grade	Course Code	ADL Course	Tuition Fee	Lesson Materials and Required Resources	Approved ADL Course Costs
Grades 10, 11, and 12	PED0770	Career and Life Management (CALM)	\$78.00	\$75.00	\$153.00
	SCN1270	Science 10	\$130.00	\$105.00	\$235.00
	SCN1288	Science 14	\$130.00	\$105.00	\$235.00
	SCN2231	Biology 20	\$130.00	\$110.00	\$240.00
	SCN2288	Science 24	\$130.00	\$105.00	\$235.00
	SCN2796	Chemistry 20	\$130.00	\$105.00	\$235.00
	SCN2797	Physics 20	\$130.00	\$130.00	\$260.00
	SCN3230	Biology 30	\$130.00	\$180.00	\$310.00
	SCN3240	Chemistry 30	\$130.00	\$225.00	\$355.00
	SCN3260	Physics 30	\$130.00	\$205.00	\$335.00
	SPN1345	Spanish Language and Culture 10	\$130.00	\$67.00	\$197.00
	SPN2345	Spanish Language and Culture 20	\$130.00	\$80.00	\$210.00
	SPN3345	Spanish Language and Culture 30	\$130.00	\$95.00	\$225.00
	SSN2171	Personal Psychology 20	\$78.00	\$60.00	\$138.00
	SSN2172	General Psychology 20	\$78.00	\$60.00	\$138.00
	SSN2176	General Sociology 20	\$78.00	\$60.00	\$138.00
	SSN3166	World Geography 30	\$78.00	\$60.00	\$138.00
	SST1771	Social Studies 10-1	\$130.00	\$85.00	\$215.00
	SST1772	Social Studies 10-2	\$130.00	\$85.00	\$215.00
	SST2150	Social Studies 20	\$130.00	\$85.00	\$215.00
	SST2151	Social Studies 23	\$130.00	\$85.00	\$215.00
	SST3150	Social Studies 30	\$130.00	\$85.00	\$215.00
	SST3151	Social Studies 33	\$130.00	\$85.00	\$215.00
	TOU1010	The Tourism Industry	\$26.00	\$45.00	\$71.00
	TOU3030	Food Service Operations	\$26.00	\$45.00	\$71.00
	TOU3040	Hotel / Motel Operations	\$26.00	\$45.00	\$71.00

## Alberta Distance Learning Centre Print Course Costs

Approved for Reimbursement By Alberta Education

*Reimbursement will be at 50% of the Approved ADL Course Costs Column*

Grade	Course Code	ADL Course	Tuition Fee	Lesson Materials and Required Resources	Approved ADL Course Costs
Grades 10, 11, and 12	TOU3060	Travel Agency Operations	\$26.00	\$45.00	\$71.00
	TOU3070	Reservations and Ticketing	\$26.00	\$45.00	\$71.00
	TOU3080	Air Transportation	\$26.00	\$45.00	\$71.00
	UKR3355	Ukrainian 30	\$130.00	\$50.00	\$180.00
French Immersion	FIN1010	Gestion des finances 1010 (Financial Information)	\$26.00	\$35.00	\$61.00
	FIN1020	Gestion des finances 1020 (Service Business 1)	\$26.00	\$35.00	\$61.00
	FIN1030	Gestion des finances 1030 (Service Business 2)	\$26.00	\$35.00	\$61.00
	FIN2020	Gestion des finances 2020 (Merchandising Business 1)	\$26.00	\$35.00	\$61.00
	FIN2030	Gestion des finances 2030 (Merchandising Business 2)	\$26.00	\$35.00	\$61.00
	FNA1400	Art Visuels 10 (Art 10)	\$78.00	\$30.00	\$108.00
	FNA2400	Art Visuels 20 (Art 20)	\$130.00	\$65.00	\$195.00
	FNA3400	Art Visuels 30 (Art 30)	\$130.00	\$65.00	\$195.00
	LDC2754	Criminalistique 25 (Forensic Science 25)	\$78.00	\$55.00	\$133.00
	LDC3164	Psychologie Anormale 35 (Abnormal Psychology 35)	\$78.00	\$60.00	\$138.00
	SSN2171	Psychologie de la Personnalite 20 (Personal Psychology 20)	\$78.00	\$60.00	\$138.00
	SST1150	Etudes sociales 10 (Social Studies 10)	\$130.00	\$75.00	\$205.00
	SST2150	Etudes sociales 20 (Social Studies 20)	\$130.00	\$75.00	\$205.00
	TOU1040	Tourisme 1040 (The Food Sector)	\$26.00	\$35.00	\$61.00
	TOU1050	Tourisme 1050 (The Accommodation Sector)	\$26.00	\$35.00	\$61.00

## FUNDING APPLICATION FOR ADDITIONAL ADL COURSE COSTS FOR HOME EDUCATION STUDENTS IN GRADES 1 TO 6

## 2008 – 2009 SCHOOL YEAR

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

Name of School Authority: \_\_\_\_\_ Authority Code: \_\_\_\_\_

**Name of School:** \_\_\_\_\_ **School Code:** \_\_\_\_\_

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

**\*Please refer to the chart (on back) for costs eligible for additional funding.**

## CERTIFICATION

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

(Signature of: Secretary-Treasurer/Superintendent)

(Signature of: Teacher/Principal)

(Date)

## 2008 – 2009 Elementary Grades 1 to 6 ADL Course Costs (taken at the ALDC)

	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6
<b>Course</b> Tuition Lesson Materials & Required Resources	Thematics 1 \$210.00 \$345.00	Thematics 2 \$220.00 \$355.00	Thematics 3 \$220.00 \$290.00	Language Arts 4 \$110.00 \$135.00	Language Arts 5 \$110.00 \$140.00	Language Arts 6 \$105.00 \$125.00
<b>Course</b> Tuition Lesson Materials & Required Resources	Mathematics 1 \$110.00 \$80.00	Mathematics 2 \$110.00 \$111.00	Mathematics 3 \$110.00 \$136.00	Mathematics 4 \$110.00 \$100.00	Mathematics 5 \$110.00 \$141.00	Mathematics 6 \$105.00 \$131.00
<b>Course</b> Tuition Lesson Materials & Required Resources				Science 4 \$110.00 \$100.00	Science 5 \$110.00 \$100.00	Science 6 \$105.00 \$185.00
<b>Course</b> Tuition Lesson Materials & Required Resources				Social Studies 4 \$110.00 \$220.00	Social Studies 5 \$110.00 \$230.00	Social Studies 6 \$105.00 \$130.00
<b>Course</b> Tuition Lesson Materials & Required Resources				French 4 \$110.00 \$221.00	French 5 \$110.00 \$216.00	French 6 \$110.00 \$216.00
<b>Course</b> Tuition Lesson Materials & Required Resources				Spanish 4 \$110.00 \$221.00	Spanish 5 \$110.00 \$216.00	Spanish 6 \$110.00 \$216.00
<b>Total Cost</b>	<b>\$745.00</b>	<b>\$796.00</b>	<b>\$756.00</b>	<b>\$1,642.00</b>	<b>\$1,703.00</b>	<b>\$1,563.00</b>
Less: 50% funding provided by supervising school board	\$712.50	\$712.50	\$712.50	\$712.50	\$712.50	\$712.50
<b>Excess costs eligible for additional funding</b>	<b>\$32.50</b>	<b>\$83.50</b>	<b>\$43.50</b>	<b>\$929.50</b>	<b>\$990.50</b>	<b>\$850.50</b>

## ECS PROGRAM UNIT FUNDING APPLICATION FOR PRIVATE ECS OPERATORS (with 10 or fewer PUF children)

### 2008 – 2009 SCHOOL YEAR

See Section 1.6 (Private ECS Operators) of the Funding Manual for **School Authorities** for information on the completion of this application.

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

Name of Private ECS/Private School: \_\_\_\_\_

Name of School/Centre: \_\_\_\_\_

Address: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Telephone No: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_ Fax No: \_\_\_\_\_

Number of Program Unit Children:  Budget Amount: \$   
(claimed on this application) (for this application)

Have any of these Program Unit children been with a previous operator? ☐ YES ☐ NO

Has Basic Instruction funding been claimed for these children? ☐ YES ☐ NO

#### NOTE:

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

### DECLARATION

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

- The **parent(s)** / guardian(s) of each child in this program unit is/are fully aware that special program plans are in place and that this application is being submitted on the child's behalf.
- Each child has been identified through screening and assessment carried out by community health nurses, **parent(s)** / guardian(s), teachers and/or child development specialists in accordance with criteria outlined in Special Education Coding Criteria 2008/2009.
- Program goals for each child have been developed on the basis of recommendations arising from screening and assessment data.
- A program consistent with the special education needs of each child will be undertaken by the teacher(s), assisted by appropriate support staff in the most enabling educational environment.
- Consultative assistance will be provided to staff and **parent(s)** / guardian(s) as required.
- Direct services will be provided to each child and/or **parent(s)** / guardian(s) as required.
- Case conferences will be held regularly to evaluate each child's progress and to decide on changes, where appropriate, in the program in consultation with the **parent(s)** / guardian(s).
- Long term plans for the child(ren) have been discussed with the receiving **school authority(ies)**.

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

\_\_\_\_\_  
Signature of Secretary – Treasurer

\_\_\_\_\_  
Date

### FOR DEPARTMENT USE:

APPROVED BY: \_\_\_\_\_ Amount Approved: \$ \_\_\_\_\_  
(Signature of Expenditure Officer)  
Special Programs Branch

\_\_\_\_\_  
(Signature of Expenditure Officer)  
School Finance Branch

Date Approved: \_\_\_\_\_

**CRITERIA FOR DETERMINING ELIGIBILITY FOR PROGRAM UNIT FUNDING**

## **Description of Severe Disabilities/Delays**

### **SEVERE COGNITIVE DISABILITY (Code 41)**

A **funded student/funded child** with a severe cognitive disability is one who:

- a) has severe delays in all or most areas of development;
- b) frequently has other disabilities including physical, sensory, medical and/or behavioural;
- c) requires constant assistance and/or supervision in all areas of functioning including daily living skills and may require assistive technology;
- d) should have a standardized assessment, which indicates functioning in the severe to profound range (standardized score of  $30 \pm 5$  or less). Functional assessments by a qualified professional will also be considered in cases where the disabilities of the person preclude standard assessments; and
- e) has scores equivalent to the severe to profound levels on an adaptive behavioural scale (e.g., AAMR Adaptive Behaviour Scales-School: Second Edition (ABS-S:2); Vineland Adaptive Behaviour Scales; Scales of Independent Behaviour-Revised).

### **SEVERE EMOTIONAL/BEHAVIOURAL DISABILITY (Code 42)**

A **funded student/funded child** with a severe emotional/behavioural disorder is one who:

- a) displays chronic, extreme and pervasive behaviours which require close and constant adult supervision, high levels of structure, and other intensive support services in order to function in an educational setting. The behaviours significantly interfere with both the learning and safety of the student/ECS child and other students/ECS children. For example, the student/child could be dangerously aggressive and destructive (to self and/or others), violent and/or extremely compulsive; and
- b) (for Grade 1 – 12 students) has a diagnosis including conduct disorder, schizophrenia or bi-polar disorder, obsessive/compulsive disorders, or severe chronic clinical depression; and may display self-stimulation or self-injurious behaviour. In the most extreme and pervasive instances, severe Oppositional Defiant Disorder may qualify; or
- c) (for ECS children) has either a diagnosis or a statement by a qualified professional indicating that the child experiences severe emotional/behavioural difficulties.

A clinical diagnosis within the last 2 years of a severe emotional/behavioural disorder by a psychiatrist, chartered psychologist or a developmental pediatrician is required, in addition to extensive documentation of the nature, frequency and severity of the disorder by **school authorities**. In the case of an ECS child who is not currently placed in a learning environment, extensive documentation of the nature, frequency, and severity of the disorder by the referring specialist may suffice. The effects of the disability on the student's/ECS child's functioning in an education setting must be described. An ongoing treatment plan/behaviour plan should be available and efforts should be made to ensure that the student/ECS child has access to appropriate mental health and therapeutic services.

A clinical diagnosis of a severe emotional/behavioural disorder is not necessarily sufficient to qualify under this category. Some diagnoses with behavioural components that are not sufficient to qualify are: Attention-Deficit/Hyperactivity Disorder (AD/HD), Attention Deficit Disorder (ADD).

### **SEVERE MULTIPLE DISABILITY (Code 43)**

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

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

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

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

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

- a) Attention Deficit/Hyperactivity Disorder (AD/HD) Attention Deficit Disorder (ADD) (ECS – gr. 12)
- b) Emotional/Behavioural Disabilities (ECS – gr. 12)
- c) Learning Disability (Grades 1 – 12 only)
- d) Speech and Language Related Delays (ECS – Grade 12)

**NOTE: ECS children diagnosed with Down Syndrome in the most severe cases should be reported under Severe Multiple Disability (Code 43).**

### **SEVERE PHYSICAL OR MEDICAL DISABILITY – including Autism (Code 44)**

A **funded student/funded child** with a severe physical, medical or neurological disability is one who:

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

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

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



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

A student/ECS child diagnosed with severe Fetal Alcohol Spectrum Disorder (FASD) may have Fetal Alcohol Syndrome (FAS) or Alcohol-Related Neurodevelopmental Disorder (ARND) and is included in this category (Code 44 – Severe Physical or Medical Disability – Including Autism). A clinical diagnosis by a psychiatrist, chartered psychologist with specialized training, or medical professional specializing in developmental disorder is required. A clinical diagnosis of FASD is not necessarily sufficient to qualify under this category. Eligibility is determined by the functioning level of the student with FASD. Students/ECS children with severe FASD who exhibit significant impairment in the areas of social functioning, life skills, behaviour, learning, attention and concentration, will need extensive intervention and support.

#### **DEAFNESS (Code 45)**

A **funded student/funded child** with a profound hearing loss is one who:

- a) has a hearing loss of 71 decibels (dB) or greater unaided in the better ear over the normal speech range (500 to 4000 hertz (Hz)) which interferes with the use of oral language as the primary form of communication, or has a cochlear implant; and
- b) requires extensive modification and specialized educational supports; and
- c) has a diagnosis by a clinical or educational audiologist. New approvals require an audiogram within the past 3 years.

If a student/ECS child has a severe to profound sensori-neural hearing loss that has not changed significantly since the initial approval by Alberta Education, documentation from a qualified specialist in the field of deafness outlining the severity of the hearing loss and modifications to the learning environment may be sufficient to support eligibility.

#### **BLINDNESS (Code 46)**

A **funded student/funded child** with severe vision impairment is one who:

- a) Has corrected vision so limited that it is inadequate for most or all instructional situations, and information must be presented through other means; and
- b) Has visual acuity ranging from 6/60 (20/200) in the better eye after correction, to having no usable vision or field of vision reduced to an angle of 20 degrees.

If a student/ECS child has a severe to profound visual impairment that has not changed significantly since the initial approval by Alberta Education, documentation from a qualified specialist in the field of vision outlining the severity of the disability and modifications to the learning environment may be sufficient to support eligibility.

For those students/ECS children who may be difficult to assess (e.g. cortical blindness – developmentally delayed), a functional visual assessment by a qualified specialist in the field of vision or a medical professional may be sufficient to support eligibility.

#### **SEVERE DELAY INVOLVING LANGUAGE (Code 47) – For ECS children only.**

A child with a severe delay involving language is one who has difficulty communicating with peers and/or adults because of a severe delay in expressive, receptive or overall language. The following criteria determine eligibility in this category:

- a) a child who has sufficient communicative ability to permit formal speech/language assessment should demonstrate results less than or equal to the first percentile in expressive, receptive or total language. If formal language assessment is not possible, a **parental** report and/or observational measure may be used; or
- b) a child who has severe phonological delay and at least a moderate delay in expressive, receptive or overall language (on a formal assessment of language); or
- c) a child who has at least a moderate to severe delay in expressive, receptive or overall language delay (on a formal assessment of language) and at least a moderate to severe delay in one or more of the following areas of development: fine motor, gross motor, vision, hearing.

Alberta Education criteria for a severe delay involving language are based on a child's developmental profile, not on individual subtest scores in any single area of development. Eligibility documentation must include an assessment completed by a Speech and Language Pathologist that includes the results of measures used and a description of the child's communicative ability. In order to qualify, the language delays must have a significant impact on areas such as: functional language, social use of language, vocabulary, language concepts, mean length of utterance, grammar and acquisition of early literacy. If the child qualifies on the basis of a language delay in combination with delays in other areas, those areas of delay must be assessed by an appropriate specialist and must result in a significant impact on the child's ability to function in an ECS environment.

Assessment reports that were completed within six months of the day the child begins his/her program must be submitted to the Special Programs Branch for pre-approval of the child's eligibility or with the PUF application.

**Clustering** must be the first option considered when planning programming for these children. In most cases a 475 hours program is sufficient.

Children with moderate to severe delays in two or more non-associated areas (not including language) should be considered under Severe Multiple Disability (Code 43).



DETAILS OF CHILDREN IN PROGRAM UNITS																	
Alberta Student Number (ASN) #	Name of Child Surname/Given Name(s)	Age Dept Use Only	Date of Birth			Location(s) of Child's Program (Including AM or PM)	R or N	Assessed Primary** Disability/Delay Code	Date Program Starts			Date Program Ends			Number of Centre-Based Program Hours	Family-oriented ECS programming Sessions**	
			Yr.	Mo.	Day				Yr.	Mo.	Day	Yr.	Mo.	Day		Total # of Sessions	Total # of Session Hours
	FIRST PROGRAM UNIT																
1.																	
2.																	
3.																	
4.																	
5.																	
6.																	
	SECOND PROGRAM UNIT																
1.																	
2.																	
3.																	
4.																	
5.																	
6.																	
	THIRD PROGRAM UNIT																
1.																	
2.																	
3.																	
4.																	
5.																	
6.																	
	FOURTH PROGRAM UNIT																
1.																	
2.																	
3.																	
4.																	
5.																	
6.																	

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

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

\*\*\* Please show the total number of eligible family-oriented ECS programming sessions for the school year and the total number of hours these sessions comprise.

## PROGRAM UNIT FUNDING (PUF) BUDGET FOR PRIVATE ECS PROGRAMS

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

### PROGRAM UNIT COSTS

#### INSTRUCTIONAL COSTS

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

\$ \_\_\_\_\_

**Employer's Portion of Fringe Benefits**

\$ \_\_\_\_\_

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

\$ \_\_\_\_\_

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

\$ \_\_\_\_\_

**PARENT INSERVICE**

\$ \_\_\_\_\_

**STAFF INSERVICE**

\$ \_\_\_\_\_

#### TRANSPORTATION COSTS:

• Transportation to and from school # trips \_\_\_\_\_ X \$ \_\_\_\_\_

• **Family-Oriented Programming** # sessions \_\_\_\_\_ X \$ \_\_\_\_\_

• Other: - Field Trips \_\_\_\_\_

• In-Program Transportation \_\_\_\_\_

**Total Transportation Costs** \_\_\_\_\_ (A)

#### LESS: TRANSPORTATION REVENUES

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

• Special Transportation # trips \_\_\_\_\_ X \$ 14.99

• Regular Transportation # children \_\_\_\_\_ X \$ 522/yr

• **Family-Oriented Programming** Transportation # sessions \_\_\_\_\_ X \$ 14.99

• Other Transportation Revenue (i.e. fees) \_\_\_\_\_

**Total Transportation Revenues** \_\_\_\_\_ (B)

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

**SPECIALIZED EQUIPMENT AND FURNITURE** (Please attach breakdown of costs) \$ \_\_\_\_\_

<b>TOTAL ECS PROGRAM UNIT COSTS</b>	\$ _____
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Guidelines for the above expenditure areas are found in the ECS Special Education Handbook 2008/2009.

<b>DEPT. USE ONLY CEILING AMOUNT</b> (based on program hours and # of FOP sessions)	\$ _____
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## ECS PROGRAM UNIT FUNDING STATEMENT OF ACTUAL EXPENDITURES FOR SCHOOL JURISDICTIONS

2008 – 2009 SCHOOL YEAR

NAME OF SCHOOL JURISDICTION: \_\_\_\_\_

- Complete one statement of actual expenditures for all Program Unit Funded (PUF) children (except designated special education ECS programs). **School jurisdictions** participating in the PUF Pilot only need to complete one statement even if they have a designated program(s).
- **School jurisdictions** with approved Designated Special Education ECS programs must complete a separate form for each designated program unless the jurisdiction is part of the PUF Pilot.
- Final payment of Program Unit Funding will be based on the lesser of actual expenditures, approved budget amount, and ceiling amount.
- Guidelines for expenditures are found in the Funding Manual for School Authorities, Part 1, Section 1.6

CONTACT NAME: \_\_\_\_\_ TELEPHONE: \_\_\_\_\_

### CERTIFICATION

#### FUNDING CALCULATION:

i) Actual Expenditures (from pg.2) \$ \_\_\_\_\_

ii) Approved Budget Total (dept. only) \$ \_\_\_\_\_

iii) Funding Ceiling Total (dept. only) \$ \_\_\_\_\_

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

\_\_\_\_\_  
Signature of Secretary – Treasurer

\_\_\_\_\_  
Date

### DEPARTMENT USE ONLY:

Allocation Approved \$ \_\_\_\_\_

APPROVED BY: \_\_\_\_\_  
Signature of Expenditure Officer (Date)

# ECS PROGRAM UNIT FUNDING STATEMENT OF ACTUAL EXPENDITURES FOR SCHOOL JURISDICTIONS

2008 – 2009 SCHOOL YEAR

NAME OF SCHOOL JURISDICTION: \_\_\_\_\_

	Actual Expenditures
<b>INSTRUCTION</b>	
Salaries and Wages	\$ _____
Employer's Portion of Fringe Benefits	\$ _____
Services Purchased	\$ _____
Supplies and Materials	\$ _____
<b>PARENT INSERVICE/STAFF INSERVICE</b>	\$ _____

	Actual Cost (A)	Revenue (B)
<b>TRANSPORTATION COSTS</b>		
To and From School	\$ _____	\$ _____
Family-Oriented Programming Sessions	\$ _____	\$ _____
Other	\$ _____	\$ _____
<b>TOTALS</b>	\$ _____	\$ _____

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

PROGRAM COORDINATION COSTS \$ \_\_\_\_\_

**CAPITAL: FURNITURE AND EQUIPMENT** \$ \_\_\_\_\_  
(ONLY capital equipment approved on a budget should be claimed)  
(Please attach a list of capital items purchased indicating the child's name beside each) \_\_\_\_\_

**TOTAL ECS PUF EXPENDITURES** \$ \_\_\_\_\_

## FOR DESIGNATED SPECIAL EDUCATION ECS PROGRAMS ONLY

### LESS: APPLICABLE REVENUES

- Base Instruction funding — # of ECS Children on Sept. 30 \_\_\_\_\_ x \$2,848.50 \$ \_\_\_\_\_
- Mild/moderate funding — # of ECS Children on Sept. 30 \_\_\_\_\_ x \$2,413 \$ \_\_\_\_\_
- Other Revenues (please specify) \_\_\_\_\_ \$ \_\_\_\_\_

**TOTAL REVENUES** \$ \_\_\_\_\_

**NET ECS PROGRAM COSTS ELIGIBLE FOR PUF** \$ \_\_\_\_\_

# ACCREDITED FUNDED PRIVATE SCHOOL AUTHORITY ACCOUNTABILITY AND FUNDING DECLARATION

NEW

Accredited Funded Private School Authority Name: \_\_\_\_\_

Accredited Funded Private School Authority Code: \_\_\_\_\_

**NOTE:** In order for Level 2 to apply to the 2008/2009 school year, this Declaration must be submitted to Alberta Education, Governance Support Branch by **November 24, 2008**.

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

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

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

**( ) Maintain Level 1 Accountabilities and Funding**

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

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

**( ) Accept Level 2 Accountabilities and Funding**

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

By choosing level 2, we confirm the following:

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

PRINT NAME	SIGNATURE	DATE
Board Chair		
Principal or Superintendent		
Treasurer		

**DEPARTMENT USE ONLY:**

**Reviewed By:**

Governance Support \_\_\_\_\_ Date: \_\_\_\_\_

Performance Measurement & Reporting \_\_\_\_\_ Date: \_\_\_\_\_

School Finance \_\_\_\_\_ Date: \_\_\_\_\_





# EDUCATIONAL PROGRAMS IN INSTITUTIONS

## Funding Application Form

2008 – 2009 School Year

NAME OF SCHOOL AUTHORITY: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_ TELEPHONE: \_\_\_\_\_

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

☐ Budget ☐ Final Costs

Name of Program	School Code	Net Program Costs
<b>Total Net Program Costs</b>		

## CERTIFICATION

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

\_\_\_\_\_  
(Signature of Superintendent or Designate)

\_\_\_\_\_  
(Date)

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

\_\_\_\_\_  
(Signature of Secretary Treasurer)

\_\_\_\_\_  
(Date)

## DEPARTMENT USE ONLY:

Total Net Program Costs = \$ \_\_\_\_\_

\_\_\_\_\_  
Performance Certifier

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
Expenditure Officer

\_\_\_\_\_  
(Date)



NAME OF PROGRAM: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_ TELEPHONE: \_\_\_\_\_

Please see Instructions (attached) for completion of this form. Also see Section 6.1 of the 2008 – 2009 Funding Manual for School Authorities. Note: If your program only has institutional students, then complete this form. If your program also has some non-institutional students, you are considered a Mixed Institutional Program and must complete the form for Mixed Institutional Programs rather than this form.

**1. Instructional Salary Costs FTE's**

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

**2. Supplies and Services Costs**

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

**3. Technology costs (see guidelines for formula)**

\$ \_\_\_\_\_

**TOTAL PROGRAM COSTS**\$ \_\_\_\_\_ **A****REVENUES RECEIVED FOR INSTITUTIONAL STUDENTS**

Note: please do not include Institutional funding

**1. Base Instruction** (based on Sept 30 enrollments of 550 coded students)Number of **Institutional students** enrolled \_\_\_\_\_ x \$5,697 \$ \_\_\_\_\_

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

**2. Other funding (please specify)** \_\_\_\_\_ \$ \_\_\_\_\_**TOTAL REVENUES**\$ \_\_\_\_\_ **B****NET PROGRAM COSTS (Total Program Costs less Total Revenues (A – B = C))**\$ \_\_\_\_\_ **C****Average number of students enrolled**

\_\_\_\_\_

To calculate the average number of students enrolled:

Step 1: Determine the number of students enrolled for each month that the program operated. Note: students who are enrolled for more than 1 month will be counted for each month attended (i.e. if a student attends the program for 3 months, then the student would be counted for each of the 3 months attended). For 2008 – 2009 Budgets, please use monthly enrollments for the 2007 – 2008 **school year**. For 2008 – 2009 Finals, please use monthly enrollments for the 2008 – 2009 **school year**.

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

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

**For Final claims, please attach a list of Institutional students (with ASN's) who were in attendance on Sept 30.**

### Instructions for Completion of the 2008 – 2009 Educational Programs in Institutions Funding Application

**Important:** There are **two categories** of institutional programs; **Regular and Mixed programs**. Regular institutional programs only have **institutional students** (i.e., students who were placed in the **institution** by a government agency 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

- Certificated Salaries & Benefits: teacher/school administration salaries & benefits
- 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

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

- 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 education needs students), technical support, and software for teacher and student use that supports the learner outcomes identified by Alberta Education. Technology costs will be calculated using the lesser of the following amounts:

- Actual costs
- For regular institutional programs that have only **institutional students**, \$500 X the average number of students enrolled (line D of the budget form).
  - 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).
- Maximum of \$10,000 total per year. Requests over the maximum amount require prior approval from the Education Manager for **Institutions** at the Special Programs Branch.

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

#### Average Number of Students Enrolled:

To calculate the average number of students enrolled:

Step 1: Determine the number of students enrolled for each month that the program operated. Note: students who are enrolled for more than one month will be counted for each month attended (i.e., if a student attends the program for 3 months, then the student would be counted for each of the 3 months attended). For 2008 – 2009 Budgets, please use monthly enrollments from the 2007 – 2008 **school year**. For 2008 – 2009 Finals, please use monthly enrollments for the 2008 – 2009 **school year**.

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

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

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

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

# Mixed Institutional Program

## Budget/Final Costs

2008 – 2009

NAME OF PROGRAM: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_ TELEPHONE: \_\_\_\_\_

Please see Instructions (attached) for completion of this form. Also see Section 6.1 of the 2008 – 2009 Funding Manual for School Authorities. Note: If your program has mixture of institutional and non-institutional students, you are considered a Mixed Institutional Program and must complete this form. If your program only has institutional students, please complete the Regular Institutional Program form.

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

### REVENUES RECEIVED FOR INSTITUTIONAL STUDENTS

Note: please do not include **Institutional** funding

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

Number of **Institutional students** enrolled \_\_\_\_\_ x \$5,697 \$ \_\_\_\_\_

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

2. **Other funding (please specify)** \_\_\_\_\_ \$ \_\_\_\_\_

**TOTAL REVENUES FOR INSTITUTIONAL STUDENTS** \$ \_\_\_\_\_ **F**

**NET PROGRAM COSTS FOR INSTITUTIONAL STUDENTS (E- F)** \$ \_\_\_\_\_

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

### Instructions for Completion of the 2008 –2009 Educational Programs in Institutions Funding Application

**Important:** There are two categories of institutional programs; **Regular and Mixed programs**. Regular institutional programs only have **institutional students** (i.e., students who were placed in the **institution** by a government agency 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 education needs students), technical support, and software for teacher and student use that supports the learner outcomes identified by Alberta Education. Technology costs will be calculated using the lesser of the following amounts:

- a. Actual costs
- b. (i) For regular institutional programs that have only **institutional students**, \$500 X the average number of students enrolled (line D of the budget form).  
 (ii) For mixed programs (i.e., programs with **institutional students** and non-**institutional students**), \$500 X the average number of **institutional students** enrolled (line D of the budget form).
- c. Maximum of \$10,000 total per year. Requests over the maximum amount require prior approval from the Education Manager for **Institutions** at the Special Programs Branch.

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

#### Average Number of Students Enrolled:

To calculate the average number of students enrolled:

Step 1: Determine the number of students enrolled for each month that the program operated. Note: students who are enrolled for more than one month will be counted for each month attended (i.e., if a student attends the program for 3 months, then the student would be counted for each of the 3 months attended). For 2008 – 2009 Budgets, please use monthly enrollments from the 2007 – 2008 **school year**. For 2008 – 2009 Finals, please use monthly enrollments for the 2008 – 2009 **school year**.

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

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

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

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

## 2008 – 2009 SCHOOL YEAR

**SCHOOL JURISDICTION:** \_\_\_\_\_

REVENUES	BASE OPERATING FUNDS BUDGET	PROV. INITIATIVES FUNDS BUDGET
• Alberta Education Base Operating Funds	\$ _____	\$ _____
• Alberta Education Provincial Initiative Funds	\$ _____	\$ _____
• Service Fees (from local jurisdiction)	\$ _____	\$ _____
# of service hours _____	\$ _____	\$ _____
• Service Fees (from other jurisdictions)	\$ _____	\$ _____
# of service hours _____	\$ _____	\$ _____
• Other Revenues – please specify _____	\$ _____	\$ _____
• Surplus Funds (carried over from previous years)	\$ _____	\$ _____
<b>Total Revenues</b>	<b>\$ _____</b>	<b>\$ _____</b>

• Consultant Salaries and Benefits (*A)	\$		\$	
• Administration Salaries and Benefits (*A)	\$		\$	
• Professional Services (contracted staff) (*A)	\$		\$	
• Operating Costs (*B)	\$		\$	
• Travel Costs	\$		\$	
• Professional Development	\$		\$	
• Facility Costs	\$		\$	
• Administration Costs	\$		\$	
• Other – please specify	\$		\$	
<b>Total Expenditures</b>	<b>\$</b>		<b>\$</b>	

**SURPLUS/(DEFICIT) FOR THE YEAR**                      \$ \_\_\_\_\_ \$ \_\_\_\_\_

\*B – please attach schedule of major cost categories indicating amounts

**Note: Please use same format for the reporting of actual costs on Audited Financial Statements**

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

DEPARTMENT USE ONLY:

\_\_\_\_\_  
Expenditure Officer (Date)

## REGIONAL CONSORTIUM

### Statement of Revenues & Expenses For the Year Ended August 31, 2009 (in dollars)

CONSORTIUM NAME: \_\_\_\_\_

	Budget 2008/2009	Actual 2008/2009	Actual 2007/2008
<b>REVENUES</b>			
<b>Alberta Education:</b>			
Management & Infrastructure (Note 1)	_____	_____	_____
Conditional Programming Grants (Schedule 1)	_____	_____	_____
Other Alberta Education	_____	_____	_____
<b>Total Alberta Education</b>	_____	_____	_____
<b>Other Revenue:</b>			
Program Registration (Note 2)	_____	_____	_____
Grants – Non Government Sources (Note 3)	_____	_____	_____
Other (Note 4)	_____	_____	_____
(Specify) _____	_____	_____	_____
(Specify) _____	_____	_____	_____
<b>Total Other Revenues</b>	_____	_____	_____
<b>TOTAL REVENUES:</b>	_____	_____	_____
<b>EXPENSES</b>			
<b>Management &amp; Infrastructure (Note 5):</b>			
Salaries, Wages, Benefits, Contracts and			
Other Fixed Overheads (Note 6)	_____	_____	_____
<b>School board Expenses (Note 7)</b>	_____	_____	_____
<b>Programming:</b>			
Costs of Delivering Programs (Note 8)	_____	_____	_____
<b>Other:</b>			
(Specify) _____	_____	_____	_____
(Specify) _____	_____	_____	_____
(Specify) _____	_____	_____	_____
<b>TOTAL EXPENSES:</b>	_____	_____	_____
<b>REVENUES less EXPENSES (Note 15)</b>	_____	_____	_____
<b>Accumulated Surplus at beginning of year:</b>	_____	_____	_____
<b>Accumulated Surplus at end of year:</b>	=====	=====	=====

**REGIONAL CONSORTIUM**  
**Statement of Financial Position**  
**As At August 31, 2009**  
**(in dollars)**

**CONSORTIUM NAME:** \_\_\_\_\_

	<b>August 31, 2009</b>	<b>August 31, 2008</b>
<b>ASSETS</b>		
Cash in Bank and Temporary Investments	_____	_____
Accounts Receivable <b>(Note 9)</b> :		
Province of Alberta	_____	_____
Alberta <b>School jurisdictions</b>	_____	_____
Other	_____	_____
Prepaid Expenses (e.g. deposits for programming)	_____	_____
Other Assets	_____	_____
<b>TOTAL ASSETS:</b>	<b>=====</b>	<b>=====</b>
<b>LIABILITIES</b>		
Accounts Payable	_____	_____
Accrued Liabilities <b>(Note 10)</b>	_____	_____
Deferred Revenues		
Programming Grants <b>(Schedule 1)</b>	_____	_____
Prepaid Registration <b>(Note 11)</b>	_____	_____
Other:		
(Specify) _____	_____	_____
(Specify) _____	_____	_____
<b>TOTAL LIABILITIES:</b>		
<b>ACCUMULATED SURPLUS</b>		
Operational Reserves <b>(Note 12)</b>	_____	_____
Unrestricted Funds <b>(Note 13)</b>	_____	_____
<b>TOTAL ACCUMULATED SURPLUS (Note 15)</b>	<b>=====</b>	<b>=====</b>
<b>TOTAL LIABILITIES AND ACCUMULATED SURPLUS</b>	<b>=====</b>	<b>=====</b>

**REGIONAL CONSORTIUM****Schedule 1 – Conditional Grant Program Revenues  
For the Year Ended August 31, 2009 (in dollars)****CONSORTIUM NAME:**

	Revenue Deferred from Previous Year	+	ADD: Current Year Receipts (a)	-	DEDUCT: Transfers to Other Consortia (Schedule 2)	-	DEDUCT: Deferred Revenue: Programming Grants (b) (Page 2)	=	Conditional Programming Grants Revenue (Page 1)
<b>Conditional Grant Programs</b>									
(Specify) e.g. Special Education									
(Specify)									
(Specify)									
(Specify)									
(Specify)									
(Specify)									
(Specify)									
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(Specify)									
(Specify)									
(Specify)									
(Specify)									
(Specify)									
(Specify)									
(Specify)									
<b>Total</b>									

a. Current Year receipts include amounts transferred in from other Consortia.

b. Deferred revenue on the Statement of Financial Position represents unexpected on programs or funds that will be expended transferred to other consortia next year.



## REGIONAL CONSORTIUM

### Schedule 2 – Transfers to Other Consortia For the Year Ended August 31, 2009 (in dollars)

**CONSORTIUM NAME:** \_\_\_\_\_

		Amount Transferred 2008/2009 (a)
<b>(Specify Program)</b>		_____
(Specify Consortium)		_____
(Specify)		_____
(Specify)		_____
(Specify)		_____
(Specify)		_____
(Specify)		_____
(Specify)		_____
Total	<b>(Specify Program)</b>	_____
<b>(Specify Program)</b>		_____
(Specify Consortium)		_____
(Specify)		_____
(Specify)		_____
(Specify)		_____
Total	<b>(Specify Program)</b>	_____
<b>(Specify Program)</b>		_____
(Specify Consortium)		_____
(Specify)		_____
(Specify)		_____
(Specify)		_____
Total	<b>(Specify Program)</b>	_____
<b>(Specify Program)</b>		_____
(Specify Consortium)		_____
(Specify)		_____
(Specify)		_____
(Specify)		_____
Total	<b>(Specify Program)</b>	_____
<b>(Specify Program)</b>		_____
(Specify Consortium)		_____
(Specify)		_____
Total	<b>(Specify Program)</b>	_____
<b>(Specify Program)</b>		_____
(Specify Consortium)		_____
(Specify)		_____
Total	<b>(Specify Program)</b>	_____
<b>Total Transfers</b>		=====

(a) Programs are reported in Schedule 1 and are excluded for the total conditional program grant revenue on the Statement of Revenues and Expenses.

## REGIONAL CONSORTIUM

### Financial Statements

### CERTIFICATION

For the Year Ended August 31, 2009

**CONSORTIUM NAME:** \_\_\_\_\_

I certify that to the best of my knowledge, the information provided in the attached statements, notes and schedules is correct.

\_\_\_\_\_  
(Signature) Chair of Consortium

\_\_\_\_\_  
(Signature) Financial Officer

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

### NOTES TO FORMS

- Note 1** Management and Infrastructure grant from Alberta Education (total amount allocated for the year).
- Note 2** Registration rates are intended to cover the direct costs reported as programming expenses.
- Note 3** E.g. grants and subsidies from private partnerships (Shaw).
- Note 4** Funding from other provincial government departments or the Federal government; bank interest, and operational fees recovered from other consortia should be placed in this section as well.
- Note 5** Costs of operating and maintaining the consortium office.
- Note 6** Including Executive Director, Executive Assistant and office staff. Fixed overheads include office space, utilities, office supplies and equipment.
- Note 7** Including meeting fees, supplies, travel and subsistence and **school board** development.
- Note 8** Program delivery costs include part-time staff and contracted coordinators/consultants(e.g. program host, presenters, registration staff), and other direct costs including materials, site, audio-visual, catering, etc. Do not include amounts transferred to other consortium shown on Schedule 2.
- Note 9** Amounts owed to the consortium at the end of the current year.
- Note 10** Unpaid balances pertaining to the year. E.g. Unpaid wages
- Note 11** Pertaining to programming planned for subsequent year(s).
- Note 12** **School board**-approved funds earmarked for future operations or programming.
- Note 13** Unrestricted Funds represent the net assets (total assets minus total liabilities) less any operational reserves for earmarked programming.
- Note 14** Accumulated Surplus is the total of operational reserves and unrestricted funds.
- Note 15** Any over-expenditure must be offset by sufficient Accumulated Surplus at the beginning of the year.

(a) Programs are reported In Schedule 1 and are excluded for the total conditional program grant revenue on the Statement of Revenues and Expenses.

## SECTION 9.3 — Contact List

### CONTACT ALBERTA EDUCATION FOR ASSISTANCE

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

BRANCH	CONTACT	PHONE #
School Finance	Brad Smith	(780) 422-0920
	Mary-Ellen Deising	(780) 422-0312
	Mark Lalumiere	(780) 422-6550
	Damien Tan	(780) 422-1098
Business Operations and Stakeholder Support	Jeff Willan	(780) 422-0930
Financial Reporting and Accountability	Dick Meanwell	(780) 422-0311
Special Programs	Ron Taylor (Calgary)	(403) 297-5021
Field Services		
Zone 1	Terry Wendel	(780) 427-5394
Zones 2 and 3	Keith Jones	(780) 427-6714
Zone 4	Loraine Steele	(780) 427-0929
Zone 5	David Woloshyn	(780) 427-5382
Zone 6	Doug Coffin	(780) 427-5412
School Improvement	Dianna Millard	(780) 427-7882
First Nations, Metis, and Inuit Services	Evelyn Good Striker	(780) 422-1962
Client Relationship Services	Help Desk	(780) 427-5318
Governance Support	Rick Hayes	(780) 427-5408
French Language Services	Gilbert Guimont	(780) 427-2940
Budget and Fiscal Analysis	George Lee	(780) 415-8325
Curriculum	Stella Shrum	(780) 422-2856
Alberta Children and Youth Initiative	Rick Hayes	(780) 422-6078
Stakeholder Technology	Bette Gray	(780) 427-1509
Capital Planning Branch North Region	Tom Davidson	(780) 427-2083
Capital Planning Branch South Region	Avi Habiski	(780) 427-2272
Capital Programs Branch (Alberta Infrastructure)	Mike Irving	(780) 422-7224

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

The 2008 – 2009 Funding Manual for School Authorities is available for viewing and printing on Alberta Education's Web site at <http://www.Education.gov.ab.ca/funding/FundingManual/>.

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

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

## SECTION 9.4 — References

**All References are hyperlinked and can be accessed through the online version of the 2008 – 2009 Funding Manual for School Authorities.**

<http://education.gov.ab.ca/funding/FundingManual/>

Aboriginal Learner Data Collection Initiative

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

AISI Web Site

Alberta Education Programs of Study

Alberta Initiative for School Improvement (AISI) Handbook for Cycle 3, 2006-2009

**Charter Schools** Handbook (2002)

**Charter Schools** Regulation — Alberta Regulation 212/2002 School Act

Early Childhood Services Policy 1.1.3

Early Childhood Services Regulation — Alberta Regulation 31/2002 School Act

ECS Special Education Handbook

French as a Second Language and French Language Immersion Policy 1.5.2

Guide for Accredited Funded Private School Education Planning and Results Reporting

Guide to Education ECS to Grade 12 (2008)

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

Guide for Educational Planning and Results Reporting- Requirements for Alberta **Charter School Authority** Three-Year Plans

Guide to **School Board** Planning and Results Reporting (2004)

UPDATED

Handbook for the Identification and Review of **Students with Severe Disabilities** 2008 – 2009

Home Education Regulation 145/2006 — Alberta Regulation 145/2006 School Act

Home Education Regulation Section 26, Notification Form — Alberta Regulation 145/2006 School Act

Innovative Classroom Technology

Kindergarten Program Statement Revised September 2005

Management of Integrated Services for Children and Youth with Complex Needs and Their Families: Guidelines for Alberta Regional Teams

**Outreach Programs** Handbook (2003)

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

Private Schools Reference Manual (2003)

UPDATED

Special Education Coding Criteria 2008/2009

Special Education Definitions (2004-2005)

Standards for Special Education, Amended June 2004

Standards for the Provision of Early Childhood Special Education (2006)

Student Health Partnership Service Plan Guidelines for 2006-2007

The First Nations, Métis and Inuit Education Policy Framework

## SECTION 9.5 — Recessing or Ceasing of Operations by a Private ECS Operator

### POLICY

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

### CONDITIONS

1. An **ECS operator**, who chooses to go into recess, may not do so for more than one **school year**.
2. The final decision to cease operations must have been reached by the members of the society governing the ECS operations, at a general meeting called within the provision of the society's by-laws. This decision should be communicated to the respective Zone Services Branch as soon as possible.
3. If an **ECS operator** decides not to continue providing a program, the operator may determine if another **ECS operator** is willing to take over the program.  
  
If another **ECS operator** in the community agrees to take over the program and to accept the transfer of assets and liabilities, including operating and capital surpluses, that new operator must acknowledge receipt of this transfer. Written acknowledgement of an agreement to these terms must be sent to the School Finance Branch, Alberta Education, with a copy to the appropriate Zone Services Branch.
4. If an **ECS operator** does not transfer its assets to another **ECS operator**, Alberta Education will determine the amount of surplus from operations to be returned to the Minister of Finance.

### PROCEDURES

1. When an **ECS operator** has made a decision to cease operations, a letter must be sent to the School Finance Branch, Alberta Education notifying them of their decision, with a copy to the appropriate Zone Services Branch. The letter must also include a copy of the **board** motion to cease operations, made at a duly called meeting of the **board**.
2. Both parties must sign an agreement/contract for the transfer of the **ECS operator's** assets and liabilities to the other **ECS operator** and submit the document to the Financial Reporting and Accountability Branch, Alberta Education by November 30 of the year in which the operator ceased operations.
3. An Audited Financial Statement (AFS) must be prepared for the final year of operation or portion thereof and submitted to the Financial Reporting and Accountability Branch, Alberta Education by November 30 following the **school year** that operations ceased.
4. Prepare an inventory schedule of all assets/liabilities transferred on the date operations ceased and have it signed by officials of the **ECS operator** accepting the transfer.

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

## SECTION 9.6 — Government Organization Act

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

## SECTION 9.7 — Withdrawal of Teacher Services or Lockout

### POLICY

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

### CONDITIONS

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



## GLOSSARY OF TERMS

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

### *Accredited Funded Private School*

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

### *Activity Program*

Means a co-curricular activity outside of, but usually complementary to, the regular curriculum and offering a high standard of professional training. This activity should be one requiring intensive training of the student.

### *Alternative French Language Programs*

Means a program offered under Sections 11 and/or 21 (1)(a) of the *School Act* where French is used as the language of instruction.

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

This is commonly referred to as French Immersion Programs.

### *Associate Board*

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

### *Associate Accredited Funded Private School*

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

### *Audition*

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

### *Blended Program*

Means an educational program consisting of two distinct parts:

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



## CEU (Credit Enrollment Unit)

Student credits do not directly relate to Credit Enrolment Units (CEU). A CEU is a funding unit used to calculate base instructional funding at the high school level paid to school authorities to allocate as they see fit. CEUs are determined when the course, the student, and the student's achievement in a course meet established criteria.

UPDATED

### Course

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

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

### Student

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

### Student Achievement

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

The funding relationship for courses is as follows:

- 1 credit courses = 1 **CEU**
- 3 credit courses = 2.5 **CEU**
- 5 credit courses = 5 **CEU**

The value of a **CEU** can be found in the rate table in Section 8 of this manual.

## Challenge Assessments

Provide high school students with a means of receiving credits and a final mark for courses in which they already possess the knowledge, skills and attitudes identified in the program of studies.

## Charter Board

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

## Charter School

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

For the 2008 – 2009 **school year**, the following **charter schools** have been approved:

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

### ***Child with a Disability/Delay***

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

### ***Child with a Mild/Moderate Disability/Delay***

Means a **funded child** who is assessed as having a mild/moderate cognitive disability, as defined in the Special Needs Coding Criteria Handbook 2008 – 2009.

### ***Child with a Severe Disability/Delay***

Means a **funded child** who is assessed as having a severe disability/delay according to the criteria and categories set out in Special Needs Coding Criteria Handbook 2008 – 2009.

### ***Child with Special Education 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 according to Special Needs Coding Criteria Handbook 2008 – 09.

### ***Clustering***

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

### ***Count Date***

UPDATED

For funding purposes this is the specific date on which students and/or children shall be counted. The **count date** is the last instructional school day of September. For the 2008 – 2009 **school year** the **count date** shall be September 30, 2008. If September 30 is a non-instructional day for a **school authority**, then the previous school day shall be used as the **count date**.

### ***Day Students***

Do not reside in an **institution** but rather are served on a day-basis in an **institution** and attend an education program in the **institution** that has been approved for **day students**. They are students who:

- i) are under the care of a health authority and require long term intensive medical treatment which can only be provided onsite in a hospital or
- ii) are under the care of the Alberta Solicitor General and require intensive supervision by a probation officer.

### ***Declaration of Managment***

Is a document that contains the following statement:

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

UPDATED

This document must be signed by the Superintendent and Secretary-Treasurer. It can be printed from RACERS or found in Section 9.2 of this manual.

## Density

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

## Designated School

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

## Designated Special Education ECS Programs For 2008 – 2009

UPDATED

Means an **ECS program** in which at least 70% of the **funded children** served have a severe disability/delay. **ECS programs** with this designation may include **children with mild to moderate disabilities/ delays** and/or regular **ECS funded children**, totaling a maximum of 30% of their ECS population. The following programs have been approved for this status for the 2008 – 2009 school year:

School Jurisdictions	Schools
• Black Gold Regional <b>Division</b> #18	– East Elementary Early Entry Program (3214) – Ecole Bellevue (3201)
• Calgary School District #19	– James Short Memorial School (Early Development Centre) (9364)
• Edmonton School District #7	– Beacon Heights School (7106) – Elmwood School (7204) – Evansdale School (7215) – Glenrose Hospital (7701) – Hazeldean School (7132) – Hillview School (7255) – Homesteader School (7240) – Kids North (0484) – Mayfield School (7209) – Scott Robertson (7171) – Tevie Millar Heritage School (7772) – Waverley School (7189)
• Edmonton Catholic Separate School District #7	– St. Gabriel School (Hand in Hand Education through experience) (8217)
• Elk Island Public School Reg. Div. #14	– REACH Program
• Grande Prairie School District #2357	– Crystal Park Pre-School Program (1150)
• Greater St. Albert Catholic Regional <b>Division</b> #29	– Vital Grandin School (2578) – G. P. Vanier School (2570)
• Medicine Hat School District #76	– Herold Pre-School (6849) – Riverside School (6853) – Elm Street School (6848)
• Medicine Hat Catholic Separate Regional <b>Division</b> #20	– St. Louis Early Dev. Program (6872)
• Northern Lights School <b>Division</b> #69	– Vera M. Welsh School (2704)
• Parkland School <b>Division</b> #70	– Broxton Park School (2228)
• Rocky View School <b>Division</b> #41	– Preschool Intervention Program (PIP)
• Wetaskiwin Regional <b>Division</b> #11	– Wetaskiwin Early Ed. Centre (WEEC)

### ***Designated Special Education ECS Programs (Private ECS Operators)***

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

### ***Designated Special Education Private School (DSEPS)***

Is a **private school** given special approval and funding by Alberta Education where the sole purpose of the **school** is to serve students with identified special education needs, and all students who are enrolled in the **school** are diagnosed with a mild, moderate, or severe disability. The educational programs provided to the students require modifications or adaptations to the *Program of Study*, and are specified in the **Individualized Program Plan (IPP)** developed and implemented for each student. The following DSEPS are approved for the 2008 – 2009 **school year**.

- Calgary Quest Children's Society (9795)  
Calgary Quest School (5398)
- The Calgary Society for Effective Education of Learning Disabled (9131)  
Calgary Academy (9908)
- Edmonton Academy Society for Learning Disabled (9172)  
Edmonton Academy (7953)
- Elves Special education needs Society (9263)  
Elves Child Development Centre (0655)
- Foothills Academy Society (9107)  
Foothills Academy (9917)
- Janus Academy Society (0025)  
Janus Academy (0032)  
Holy Cross Site (1323)
- Parkland Community Living and Supports Society (9027)  
Parkland School Special Education (4493)
- Renfrew Educational Services Society (9672)  
Renfrew – Centre (0249)
- Rundle College Society (9230)  
Rundle College Academy (5297)
- Third Academy International Ltd. (0023)  
The Third Academy – Calgary (0031)  
The Third Academy – Red Deer (0477)  
The Third Academy – Lethbridge (0522)

### ***Developmentally Immature***

Means an individual who is eligible to enter Grade 1 but is less than 7 years old on September 1, and who is enrolled in an **ECS program** because the **parent** and the **school jurisdiction** agree that an **ECS program** is the most appropriate program for the child. (Code 10)

### **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**

Means a **school board**, an **accredited funded Private School** or a **private ECS operator** that has been approved by Alberta education to provide an ECS program.”

### **Early Childhood Services (ECS) Program**

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

### **ECS HOME PROGRAM**

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

### **Educational Services Agreement**

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

### **Effective Transportation Area**

For the purposes of Rural Transportation Block funding is the total area in square miles in a **school jurisdiction** including:

- any township which a portion of the township is privately owned; and
- two square miles per mile of road corridor through vacant townships between populated areas.

but excluding:

- unpopulated Crown land, military reserves, grazing leases, provincial parks, and large bodies of water;
- townships where two or more adjacent townships have vacant land which is at least the size of a township;
- outlying townships within the jurisdiction boundary where the **school jurisdiction** provides no transportation service;
- city, town, village or hamlet with a population greater than 10,000; and
- the portion for transportation services provided by another **school jurisdiction** under a **transportation agreement**;

### **Eligible Passenger**

For purposes of Student Transportation funding refers to an individual who is transported under Section 51 of the *School Act* and the *Student Transportation Regulation* or required to be transported to and from **school** under Section 51 of the *School Act* and the *Student Transportation Regulation* and is enrolled in a **school** of the **board**, as follows:

1. An employee of the **school jurisdiction** accompanying a **student with a disability** or a **child with a disability/delay** in a program unit who is transported to and from **school**;
2. A **funded student** who:
  - a) resides within the boundaries of a **school jurisdiction** and attends a **school** operated by that **board**; or
  - b) resides within the boundaries of a **school jurisdiction** and attends a **school** operated by another **board** with which the **school jurisdiction** has an **education services agreement** for that student; or
  - c) resides within the boundaries of another **school jurisdiction** with which the **board** has an existing **transportation agreement** for that individual or who has been admitted to a **school** operated by another **board** and is transported within the boundaries of that **board**; or
  - d) resides in **unorganized territory** and attends a **school** operated by a **board** adjacent to the **unorganized territory**; or
  - e) resides in **unorganized territory** and attends a **school** operated by a **board** or **private school** with which the **school jurisdiction** adjacent to the **unorganized territory** has an existing **transportation agreement**; or
  - f) resides at least 2.4 kilometers (by the most direct route on a **highway**) from the **school** that the individual has been directed to attend pursuant to Section 45(2) of the *School Act*; or
  - g) resides at least 2.4 kilometers (by the most direct route on a **highway**) from the **school** at which the individual is attending a language program complying with Section 11 of the *School Act*; or
  - h) resides in **unorganized territory** at least 2.4 kilometers (by the most direct route on a **highway**) from the **school** that individual attends;
3. A **student with a disability/delay** requiring transportation to and from **school** and who is unable to walk to **school** as the result of a disability/delay; or
4. A **funded student** who is transported by horse drawn vehicle to the **school** which the student has been directed to attend; or
5. A **funded student** who has been directed by their **resident board** to attend an **accredited funded private school** with which the **resident board** has an **education services agreement** that has been approved for funding.

### **Eligible Student**

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

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



7. Is not a **First Nations student with status who lives on a reserve** pursuant to the *Indian Act* (Canada).

### **Eligible Transportation Distance**

For the purpose of Rural Transportation Block funding means the **distance** each **eligible passenger** resides from his or her **designated school**. It is the one-way **distance** from the boundary at the roadway access to the residence nearest to the **school** of the quarter section or lot which the residence of the **eligible passenger** is situated to the **designated school** in kilometers on a traveled road or public right of way on any part of which the public is ordinarily entitled or permitted to use for the passage of vehicles, but does not include privately owned laneways or roads.

**Distances** that students are transported on private laneways or roads is **eligible transportation distance** only where the **eligible passenger** is wheelchair-bound, is a **student with a severe disability**, or is a **child with a severe disability/delay**.

### **Eligible Transported ECS Child**

Is a **funded child** who resides at least 2.4 kilometers from the **ECS program** and who is transported to the **ECS Program**. This **distance** limit does not apply to children who are funded through Special Transportation funding or **children with a severe disability** who are transported by their **parent**.

### **Expected Eligible Passenger**

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

### **Family-Oriented Programming**

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

### **First Nations Child/Student who Resides on a Reserve**

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

### **Francisation**

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

### **Francophone Education Program**

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

### **Francophone Regional Authority**

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

### **French as a Second Language (FSL)**

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

### ***French First Language (Francophone) Education***

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

### ***Frozen Funded Head Count***

Is a snapshot of the **Funded Student** Count as of the **count date** as it stands on the last business day in May each year.

### ***FTE***

Full Time Equivalent

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

### ***FTE Funded Child(ren)/students***

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

### ***FTE Funded Enrollment***

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

### ***FTE Weighted Enrollment***

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

### ***Funded Child***

Means an individual who:

- Is attending an **ECS program** on the **count date** of the current **school year** operated by a **school authority** or is covered by an **educational services agreement** under Section 62 (1) (b) of the *School Act* that has been approved for funding by the School Finance Branch; and
- Meets the minimum age requirements as set out in the following table\*:

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

\*The maximum years of funding cannot be combined.



- c) Has a **parent** who ordinarily resides in Alberta on the **count date**; and
- d) Is a Canadian citizen on the **count date**; or
  - i) is lawfully admitted to Canada for permanent residence; or
  - ii) is a child of a Canadian citizen; or
  - iii) is a child of an individual who is lawfully admitted to Canada as a permanent or **temporary resident**; or
  - iv) is a stepchild (who has been issued a study permit) of a temporary foreign worker that is in Canada on a work permit; and who is the biological or adopted child of the temporary foreign worker's spouse or partner; or
  - v) is a step-child of a Canadian citizen and is the biological or adopted child of the Canadian citizen's non-Canadian spouse or partner.
- e) For funding purposes, a **First Nations child who resides on a reserve** does not qualify and is not counted as a **funded child**.
- f) An individual who is at least 5 years 6 months but less than 6 years of age on September 1, and who is either coded severe or mild/moderate, may be counted as a **funded child** (rather than as a **funded student**) if the **school jurisdiction**, the **ECS operator** and the parent agree that an **ECS program** is the most appropriate program, and the child has spent less than the number of years in the program for which they are eligible
- g) An individual who is at least 5 years 6 months, but less than 7 years old on September 1 may be counted as a **funded child** (rather than a **funded student**) if they are enrolled in an **ECS program** and are either:
  - i) **developmentally immature**, or
  - ii) a **funded child** entering an **ECS program** for the first time

### **Funded Student**

Means an individual who:

1. Is attending a **school** or a **blended program** in Grades 1 to 12 on the **count date** of the current **school year**;
  - a) operated by a **school jurisdiction** or the governing body of an **accredited funded private school**; or
  - b) is the subject of an agreement under Section 62 (1)(b) of the *School Act* entered into by the student's **resident board** that has been approved for funding by the School Finance Branch, or
  - c) in another province or country under a **reciprocal exchange program** approved by Alberta Education with a student from that respective province or country.
2. Is at an age on September 1 in the **school year** in which he/she is counted, as follows:
  - a) at least 5 years 6 months of age and is eligible to enter Grade 1 according to the school entrance age policy of the **school jurisdiction** that enrolls the student, but less than 20 years of age; or
  - b) less than 5 years 6 months of age, is enrolled in Grade 1, and has previously attended an **Early Childhood Services (ECS) program** outside of Alberta that meets the learner expectations of the Kindergarten Program Statement; or
  - c) 6 years but less than 7 years of age and who has a mild, moderate or severe disability/delay and requires another year of ECS;
3. Is a Canadian citizen on the **count date**; or
  - i) is lawfully admitted to Canada for permanent residence; or
  - ii) is a child of a Canadian citizen; or

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- iii) is a child of an individual who is lawfully admitted to Canada as a permanent or **temporary resident**; or
- iv) is a stepchild (who has been issued a study permit) of a temporary foreign worker that is in Canada on a work permit; and who is the biological or adopted child of the temporary foreign worker's spouse or partner; or
- v) is a step-child of a Canadian citizen and is the biological or adopted child of the Canadian citizen's non-Canadian spouse or partner.
  - a) proof of application for permanent resident status and fee payment to Citizenship and Immigration Canada (CIC)
  - b) valid study permit for child or student.
- 4. Has a **parent** who resides in Alberta on the **count date** (*School Act*, Section 273), or is an **independent student** who resides in Alberta on the **count date**;
- 5. For funding purposes, a **First Nations student who resides on a reserve** does not qualify and is not counted as a **funded student**.
- 6. For funding purposes, a **home education student** is not counted as a **funded student**.

### Group Home

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

### High School Refugee Student

Means a high school age **funded student** who was born outside of Canada and has entered Canada as a refugee (as determined in the *Immigration and Refugee Protection Act* where a refugee is defined as someone who has been forced to flee their country due to persecution). An **eligible student** must provide the **school jurisdiction** with a copy of the Acknowledgement of Convention Refugee Claim. These students will have had little or no formal schooling and are unable to complete many courses in the high school *Program of Studies*. Instead they are enrolled in a program that focuses on basic literacy, numeracy and functional skills to improve their chances of success in school and life and to help them integrate into Canadian society.

### Highway

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

### Home Education Student

Means an individual who:

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

4. Is a Canadian citizen; or
  - a) lawfully admitted to Canada for permanent residence;
  - b) a child of a Canadian citizen; or
  - c) a child of an individual who is lawfully admitted to Canada for permanent or temporary residence; and
5. Has a **parent** who resides in Alberta, or is an **independent student** who resides in Alberta; and
  - a) Is not counted by another **school jurisdiction** or **accredited funded private school** for Base Instruction funding, or an **ECS operator** under the *Learning Grants Regulation*; and
  - b) Is taking a program in Grades 1 to 12 (ECS age children are not eligible).

### **Independent Student**

Means a student under Section 1(1)(m) of the *School Act* who is:

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

### **Individualized Program Plan (IPP)**

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

### **In the Custody of a Director**

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

### **Institution**

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

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### SCHOOL AUTHORITIES APPROVED TO PROVIDE AN EDUCATIONAL PROGRAM IN AN INSTITUTION for 2008 – 2009 (School Code)

**Battle River RD No. 31**

Camrose Women's Shelter (4554)  
Camrose Community Connections (1319)

**Bosco Homes A Society for Children and Adolescents**

Columbus Academy (0577)  
Don Bosco Academy (3398)  
Phoenix Academy (0028)  
Thomas More Academy (0483)

**Calgary School District No. 19**

Dr. Gordon Townsend (9886)  
Enviros Base Camp (9687)  
Excel Discovery Program (9687)  
Westview YOC (9687)  
William Roper Hull School (9033)  
Women's Emergency Shelter (no code)

**Chinook's Edge School Division**

Grimmon House (1058)

**Edmonton Catholic Sch. District No. 7**

AADAC Treatment Centre (1174)

**Edmonton School District No. 7**

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

**Elk Island PSD No. 14**

A Safe Place (3343)

**Foothills SD No. 38**

Stampede Ranch (5391)

**Fort McMurray Catholic No. 32**

Youth Treatment Centre (1871)

**Grande Prairie SD No. 2357**

Grande Prairie YOC (Bear Creek School) (1148)

**Greater St. Albert Catholic Regional No. 29**

Nightwind Program (1412)

**Holy Family CSRD No. 37**

St. Francis Holistic Education Centre (YAC) (1619)

**Lakeland RCSSD No. 150**

Dr. Margaret Savage Crisis Centre (2916)

**Lethbridge SD No. 51**

Harbour House (6459)  
Hospital Program (6453)  
Pitawani (6456)  
AADAC Program (1380)

**Medicine Hat School District No. 76**

Palliser Adolescent Services (6864)

**Northern Lights SD No. 69**

Lac La Biche YAC (2716)

**Parkland School Division No. 70**

Bright Bank Academy (1321)

**Peace Wapiti School Div No. 76**

Rycroft School (1055)  
Sexsmith Group Home (1055)

**Red Deer School Dist No. 104**

Direwood Treatment Centre (4461)  
Oskayak Treatment Centre (4469)  
Parkland Youth Homes (4464)  
Red Deer Hospital Program (0574)  
Red Deer Youth Assessment Centre (4457)

**Sturgeon SD No. 24**

Oak Hill Boys Ranch (2509)

**Wild Rose School Division No. 66**

Kootenay School (4111)

**Wolf Creek RD No. 72**

Alberta Hospital Ponoka (4299)  
Twin Oaks (1040)

### ***Institutional Students***

Are **resident students of government** and **day students** who attend an education program in an **institution** that is approved for **day students**.

### ***Levels of Support***

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

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

### ***Minister***

Means the **Minister** of Education.

### ***Online Program***

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

### ***Operating Day***

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

### ***Other Language Immersion Programs***

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

### ***Outreach Program***

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

### ***Parent***

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

### ***Private Early Childhood Services (ECS) Operator***

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

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

### **Private School**

Means a **school** registered under Section 28 of the *School Act*.

### **Reciprocal Exchange Program**

Means a recognized program under which a student who is an Alberta **resident student** is partnered or paired with a student who is a resident of another province or country. The same **school authority** that sends the partnered Alberta **resident student** on the exchange must also receive the partnered student from another province or country either in the same **school year** or in the subsequent **school year**.

### **Resident Board**

Means the **board** of a **school jurisdiction** of which a student is a **resident student**.

### **Resident Student**

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

### **Resident Student of the Government**

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

### **Route Distance**

Is a term used in conjunction with rural transportation and means:

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

### **Rural District**

Means a district or **division** that is not an **urban district**.

### **School**

Means a structured education environment through which an education program is offered to a student by:

1. A **board**;
2. A **charter school**;
3. A **private school**;
4. An **Early Childhood Services (ECS) private operator**;
5. A **parent** providing a home education program;
6. The **Minister**.

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

### **School Authorities**

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

### **School Board**

Means the **school board** of trustees of a **school jurisdiction**.

### **School Building**

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

### **School Bus**

Means a motor vehicle that:

1. Is owned, leased or contracted by a **school authority**;
2. Is used for the transportation of **eligible passengers**;
3. Has a passenger **seating capacity** of 12 or more; and
4. Is without exemption a Type I, Type II, Type III or Type IV **school bus** as described in the CSA Standard D 250-M 2001 as amended or replaced from time to time as issued by the Canadian Standards Association.

### **School Jurisdiction**

For funding purposes means an Alberta school district, school **division**, regional **division**, **francophone regional authority**, **charter school**, the Lloydminster Public School **Division**, or the Lloydminster Roman Catholic Separate School **Division**.

### **Schools of Choice**

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

Example:

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

### **School Year**

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



### ***Student(s) with a Disability***

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

### ***Student(s) with a Mild/Moderate Disability***

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

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

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

### ***Student with Special Education Needs***

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

### ***Submission Date***

Is the date by which a **school authority's** student/child registration information (as of the **count date**) must be submitted to and received by Alberta Education. The **submission date** is three business days after the **count date**. For the 2008 – 2009 **school year**, the **submission date** is October 3, 2008.

### ***Temporary Resident***

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

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

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

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



## **Term**

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

**Term 1** — September to February

**Term 2** — March to August\*

**Term 3** — September to August\* — full year

**Term 4** — July and August — summer school

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

## **Transportation Agreement**

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

## **Unorganized Territory**

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

## **Urban District**

Means:

1. A city district which is not included in a school **division** or regional **division**; and
2. A district, **division** or regional **division**, or portion thereof, designated by the **Minister** as an **urban district**.

## **Weighting Factor**

Is a term used in conjunction with rural transportation and means, for the purposes of Block Funding, that:

1. Each **eligible passenger** in ECS and Grades 1 to 6 is multiplied by a factor of 1.0;
2. Each **eligible passenger** in Grades 7 to 12, is multiplied by a factor of 1.50;
3. Each **eligible passenger** in Grades 1 to 12 registered as Code 41, 42, 43, 44 or 46 student, is multiplied by a factor of 3.0;
4. An aide accompanying a **student/child with a severe disability** is multiplied by a factor of 1.50; and
5. Each **eligible passenger** who requires a wheelchair is multiplied by a factor of 8.0.