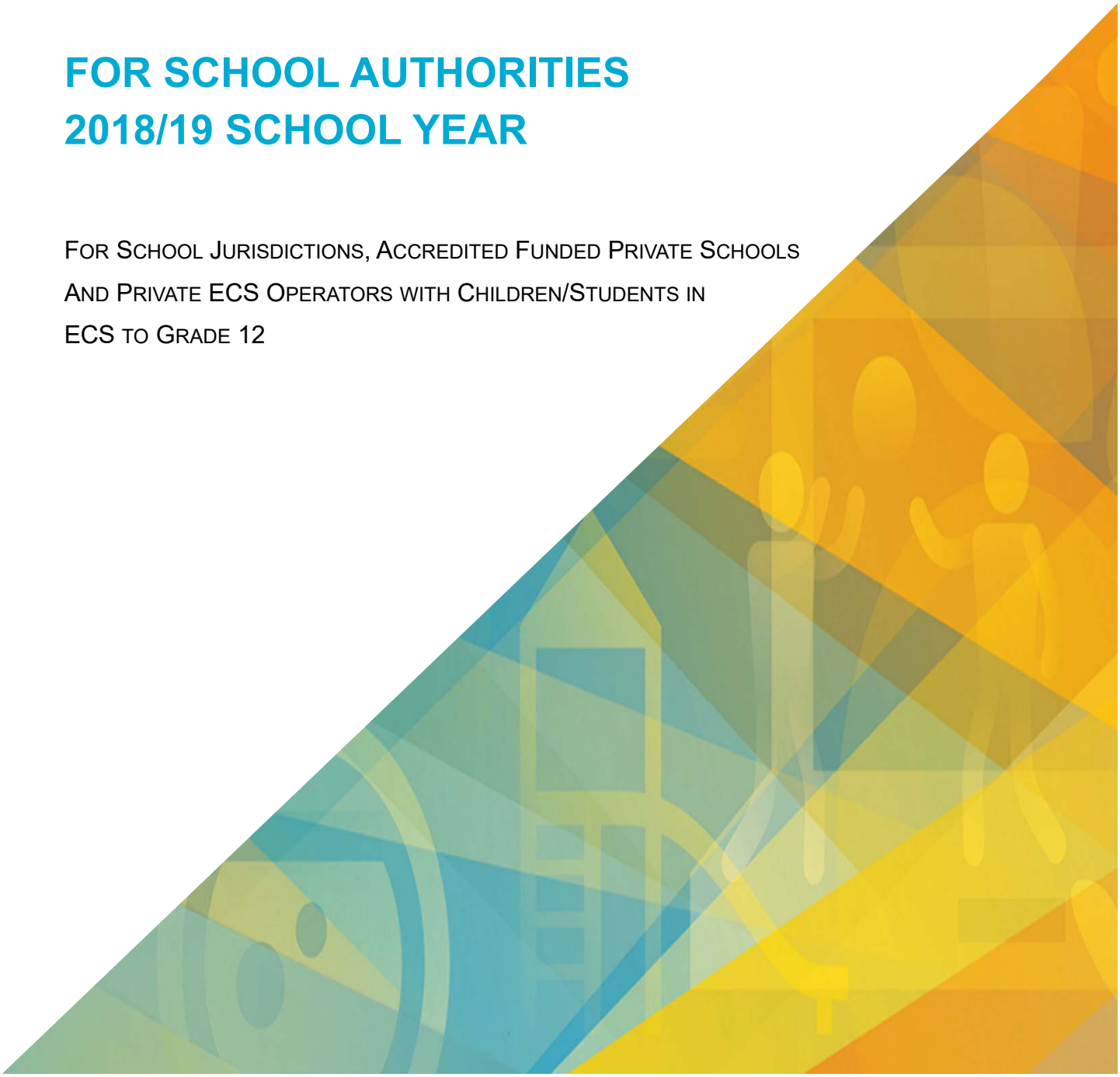
Alberta Education

FUNDING MANUAL

FOR SCHOOL AUTHORITIES
2018/19 SCHOOL YEAR

For School Jurisdictions, Accredited Funded Private Schools and Private ECS Operators with Children/Students in ECS to Grade 12



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The primary audience for this resource is:

Teachers	
Central Office Administrators	✓
School Administrators	✓
Parents	
General Public	
Students	

This resource is available on the Alberta Education website at

www.education.alberta.ca/admin/funding/manual.aspx

Note: Several websites are listed in this resource. These sites are listed as a service only to identify potentially useful resources. All website addresses were accurate at the time of publication but are subject to change. The responsibility to evaluate these sites rests with the user.

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FUNDING MANUAL
FOR SCHOOL AUTHORITIES
2018/19 SCHOOL YEAR

This manual is issued under authority of the following:

- *School Act*, RSA 2000, Chapter S-3, Section 176
- *Alberta School Foundation Fund Regulation* (AR250/1996)
- *Government Organization Act*, RSA 2000, Chapter G-10, Section 13
- *Education Grants Regulation* (AR120/2008), Section 2

(Original Signed)
Deputy Minister of Education

Date

March 22, 2018

Message from the Deputy Minister

I am pleased to provide you with Alberta Education's *Funding Manual for School Authorities* for the 2018/19 school year.

The manual will assist school jurisdictions, charter schools, accredited funded private schools and private early childhood services (ECS) operators in accessing and understanding Alberta Education funding. The manual provides details on the funding available for the 2018/19 school year including applicable formulas, funding rates, criteria and reporting requirements. Funding from Alberta Education supports the provision of approved education programs for children and students in ECS to Grade 12.

The Summary of Significant Changes highlights important changes for 2018/19. Any questions may be directed to the appropriate contact listed in Section 10.2.

Please accept my best wishes for a successful school year.

Sincerely,

(Original Signed)

Curtis Clarke, PhD
Deputy Minister

Summary of Significant Changes

Funding Manual for School Authorities 2018/19 School Year

The following are the significant content changes made to the *2018/19 Funding Manual for School Authorities*. Some of these changes may not apply to all school authority types. Changes are indicated throughout the manual with the words "Revised" or "New" in the left side margin of the page.

Section 9.1 – School Jurisdiction Funding Rates

- For the 2018/19 school year, all funding rates remain the same as for 2017/18.

Section 9.2 – Private ECS Operators Funding Rates

- For the 2018/19 school year, all funding rates remain the same as for 2017/18.

Section 9.3 – Accredited Funded Private Schools Funding Rates

- For the 2018/19 school year, all funding rates remain the same as for 2017/18.

Glossary Definition – Funded Child

- In anticipation of the 2020/21 change to age of access to kindergarten (5 years at December 31), and to ensure alignment through the ECS system, the age of funding eligibility for children with severe disability/delay has been changed from 2 years 6 months to 2 years 8 months.

Section 1.2 – Grades 1-12 Base Instruction Funding

- Update included for Local Authorities Pension Plan (LAPP) under Fees and Deductions section within 1.2. LAPP made the decision to reduce employer and employee contributions rates by 1% effective January 1, 2018.

Section 1.5 – ECS Program Unit Funding (PUF)

- PUF Budget/Actual forms have been updated and must be used in the submission process. (see form section)

Section 4.5 – Innovation in First Nations Education

- Continuation of the Building Collaboration and Capacity in Education (BCCE) grant program will occur through a second phase called Innovation in First Nations Education (IFNE). The new IFNE grant program is designed to increase opportunities for First Nations students to receive coordinated education supports and services that are responsive to their needs. First Nations, First Nation Education Authorities, Tribal Councils and provincial school jurisdictions with Education Services (or Tuition) Agreements with First Nations and First Nation schools are eligible to apply for this program.

Section 4.7 – First Nation ESA Standards

- Standards are currently under development.

Section 6.9 – Classroom Improvement Fund

- The grant expires August 31, 2018 as per the current collective agreement. The future of this program is under review.

Section 7.1 – Education Programs in an Institution (EPI)

- Forms have been updated in relation to this section to include a more comprehensive Alberta Education revenue offset in the final funding calculation. The calculation of net program costs will now be based on total costs less specified grant revenue

Section 8.1 – School Facilities (School Jurisdiction)

- Capital payments for school facilities (construction projects and modernizations) will be processed by Alberta Infrastructure effective April 1, 2018.

Questions regarding these changes may be directed to Daimen Tan, Sharon Johnson or William Poon of the School Finance Branch at 780-427-2055.

Fall Update
Summary of Significant Changes

Funding Manual for School Authorities 2018/19 School Year

The following are the significant content changes made to the *2018/19 Funding Manual for School Authorities* in this fall update. Some of these changes may not apply to all school authority types. Changes are indicated throughout the manual with the words “Revised” or “New” in the left side margin of the page.

Section 3.2 – Base Instruction Funding for Designated Special Education Private Schools (DSEPS)

- Allocation criteria are updated to be more specific about the requirements DSEPS documentation must meet to substantiate the process of parent consultation with the resident board.

Section 6.9 – Classroom Improvement Fund (CIF)

- This program has returned for the 2018/19 school year. Priorities for the 2018/19 program are the retention of staff hired with the 2017/18 CIF funding and a focus on improving experiences for students with complex needs and English Language Learners.
- Please refer to Section 6.9 and the Classroom Improvement Fund (CIF) Grant Proposal -- 2018/19 for details and changes that have occurred within the program.

Questions regarding these changes may be directed to Daimen Tan, Sharon Johnson or William Poon of the School Finance Branch at 780-427-2055.

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FOREWORD

Funding for early childhood services (ECS) to Grade 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 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. All **school authorities** must submit enrolment information through PASI and Student Records.
2. Unless otherwise specified, funding is for the current **school year** based on the funding rates and payment schedules found in Part 9.
3. 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**.
4. 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 children and students, 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*.
5. **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, 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;
        iv. ensuring that goals and standards applicable to the provision of basic education are met; and
        v. 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*.
6. The reference documents listed in 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.
7. **School authorities** applying for funding shall keep on file, for seven years, the documents required to support their claim for each type of funding described in this manual, including invoices. The following are examples of other information to be kept on file:
    a. an eligible enrolment count as of the **September count date** for the **school year**;
    b. copies of current **education services 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**.

8. 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**.

9. An adjustment may be made to a payment when a review or audit by Alberta Education indicates that:

   a. a **school authority** has received funding to which it was not entitled (pursuant to Section 9(1) of the *Education Grants Regulation*) – Note: no limitation period; or

   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**.

10. Payments may be withheld from **school authorities** if the Audited Financial Statements or the Budget Report have not been properly completed in accordance with the respective guidelines and submitted by the due date. This also applies to the **School Board** Three-Year Education Plan or the Annual Education Results Report (AERR); **Accredited Funded Private Schools** and **Private ECS Operators** submitting their certified staffing information via TWINS or any other information required by the **Minister**. When the documents have been submitted and are determined to be acceptable, payments will then be released.

11. Payments may be withheld from **Accredited Funded Private Schools** and **Private ECS Operators** for failure to file annual returns with Corporate Registries. Operators must remain active according to corporate searches.

12. **ECS operators** who have received funding from Alberta Education to provide an **ECS program** and have decided to cease operations may be required to return a portion of their accumulated operating surplus to the Government of Alberta (see Section 10.3).

13. Pursuant to the *Education Grants Regulation* and the *Government Organization Act*, and in addition to the funding provisions in this manual, the **Minister** may provide funding to a **school authority**, or any other person, or organization for purposes related to the education of Alberta students and children.

14. **Accumulated Deficit from Operations (ADO)**:

   a. a budgeted **annual operating deficit** is acceptable if sufficient **accumulated surplus from operations (ASO)** is available to cover the planned shortfall. If sufficient **ASO** is not available, any resulting **accumulated deficit from operations (ADO)** must be supported by an **ADO** Elimination Plan approved by the Executive Director, Strategic Financial Services, which must be submitted with the Budget Report. A **school authority** submitting an **ADO** Elimination Plan will be expected to work with Alberta Education to achieve expected financial results.

   b. November 30 is the deadline for **school authorities** to submit Audited Financial Statements (AFS) for the previous **school year**. A **school authority** submitting an AFS with **an accumulated deficit from operations (ADO)** will be expected to work with Alberta Education to eliminate the **ADO** within three to five years in accordance with an **ADO** Elimination Plan approved by the Executive Director, Strategic Financial Services.

   c. a **school authority** may be subject to an inquiry under Section 41 of the *School Act*. A **school jurisdiction** may be subject to the appointment of an official trustee under Section 42 of the *School Act* 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 3.6 per cent to 5.4 per cent depending on the student enrolment of the **school jurisdiction**. To determine the maximum expenditure, the applicable percentage is applied to a **school jurisdiction's** total expenditures as outlined in the Guidelines published by the Financial Reporting and Accountability Branch. See Section 1.2, Fees and Deductions on how this reduction will be deducted from **school board** payments.
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 6 of this manual.
4. Funding for capital needs is allocated to **school jurisdictions** based on priorities and formulas determined by Alberta Education. 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, education programs in an **institution** funding, program unit funding, regional consortium funding, and debt retirement.
6. Funding is provided to support the delivery costs for ECS to Grade 12 programs. It cannot be distributed directly to students or families through cash or cash equivalents, scholarships or capital assets where the primary or sole criteria is completion of a certain number of courses or credits.
7. **School authorities** are not permitted to provide funding to students or families in cases where a student is enrolled in an online or regular school program. The only permissible instance for grant funding to be provided to parents is for students enrolled in a home education program.

ALLOCATION CATEGORIES

Funding allocations are distributed in six categories: base instruction funding, additional funding for differential cost factors, targeted funding for provincial initiatives, First Nations, Métis and Inuit funding, other provincial support and capital funding.

1. Base Instruction Funding
    a. Is provided on a per student basis for every full-time equivalent **(FTE)** student from early childhood services (ECS) to Grade 9. For students in Grades 10 – 12, base instruction funding is provided based on credit enrolment units (**CEUs**).
    b. Class size funding is a component of base instruction and is provided for every student from early childhood services (ECS) to Grade 3.
2. Additional Funding for Differential Factors
    a. Is based on distribution formulas designed to address variable cost factors.
    b. Specific identified student populations include:
        i. Early childhood services **children with mild/moderate disabilities**, those with severe disabilities/delays and those who are gifted and talented;
        ii. English as a second language/**Francisation** children/students;
        iii. First Nations, Métis, and Inuit children/students;
        iv. The percentage of the student population of a **school jurisdiction** experiencing low socio-economic status (SES).
    c. 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.

d. The allocation formulas are designed to address variable cost factors, such as:
   i. Increased costs to operate **schools** with low enrolments;
   ii. Administration costs for **school jurisdictions** with small enrolments;
   iii. Increased costs for **schools** located in the north;
   iv. Variable cost of transporting students in rural, urban and metro **school jurisdictions**;
   v. Support for Hutterite colony schools;
   vi. 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. This includes funding for Regional Collaborative Service Delivery, Building Collaboration and Capacity in Education, School Fees, School Transportation Fees and SuperNet service.

4. First Nations, Métis and Inuit Funding

   Identifies funding specifically related to the First Nations, Métis and Inuit population in Alberta.

5. Other Provincial Support

   Is provided in addition to the funding identified above and covers such areas as institutional programs, regional consortium, debt retirement and the Fort McMurray allowance.

   Beginning in the 2014/15 **school year**, ongoing funding is provided to eligible **school jurisdictions** to address teacher salary grid changes as outlined in Part B of the Framework Agreement between the Government of Alberta, the Alberta Teachers' Association and the Alberta School Boards Association and referenced in the *Assurance for Students Act*.

   www.assembly.ab.ca/ISYS/LADDAR_files/docs/bills/bill/legislature_28/session_1/20120523_bill-026.pdf

6. Capital Funding

   Is provided for modernization of an existing school facility, or construction of a new school facility. Infrastructure Maintenance and Renewal funding is provided to maintain safe and healthy school facilities. This funding may only be used for the purpose it was intended.

REVENUE SOURCES FOR SCHOOL JURISDICTION FUNDING

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

1. The Alberta School Foundation Fund (ASFF) provides payments on an equal amount per **ASFF eligible student**:

   a. For the purpose of the ASFF, the term "**school boards**" does not include **Francophone regional authorities**, **charter schools**, a**ccredited funded private schools** or **private ECS operators**.

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

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

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

Payment from ASFF

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

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

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

MANUAL FORMAT

A list of major changes is provided in the accompanying document: *Summary of Significant Changes*.
Parts 1 to 8 of the manual describe the funding that is available to **school authorities** with the following format:

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

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

Part 9: Payments to School Authorities

This section identifies funding rates and payment schedules.

Part 10: Additional Information, Reporting Requirements

The following information is included in this section:

1. Information and reporting requirements
2. Alberta Education Contact list
3. Ceasing of operations by a **private ECS operator**
4. *Government Organization Act*
5. Withdrawal of teacher services or lockout

Forms

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

Glossary of Terms

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

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

BASE INSTRUCTION FUNDING

Section 1.1 — Early Childhood Services (ECS) Base Instruction Funding

ALLOCATION FORMULA

ECS Funding Allocation	=	# of **funded children**	**X**	(ECS Base Instruction Rate + ECS Class Size Rate*)

.*Note: **accredited funded private schools**, **private ECS operators**, and Hutterite Colony Schools are not eligible for ECS Class Size Funding.

ALLOCATION CRITERIA

1. Access to a minimum of 475 hours of ECS instruction must be provided for each child during a school year. Modifications to this requirement may be made for individual **children with special education needs** based on their **individualized program plan (IPP)** or **instructional support plan (ISP)** and age.
2. A child referred to in Section 30(1)(a) of the *School Act* is not a resident or non-resident student of a **board**. An approved **ECS operator** must be prepared to accept and organize programming for all **funded children** for whom programming is requested, including **children with special needs**.
3. A **funded child** can only be claimed for funding by one **ECS operator** per year.
4. **ECS operators** are eligible for one year of ECS base instruction funding for **kindergarten funded children**, who are at least 4 years 6 months of age and less than 6 years of age on September 1.
5. **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.
6. **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.
7. An individual who is at least 5 years 6 months but less than 6 years of age on September 1, and who is coded as mild/moderate or severe, may be counted as a **funded child** (rather than as a **funded student**) if the **school jurisdiction**, the **ECS operator** and the **parent** agree that an **ECS program** is the most appropriate placement, and the child has spent less than the number of years in the program for which they are eligible.
8. An individual who is at least 6 years old 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 **developmentally immature** or are entering an **ECS program** for the first time. Any other situations involving registering an over age child require special approval by the School Finance Branch.
9. **Children with mild/moderate disabilities/delays** or children who are gifted and talented and who are over the age of 3 years 6 months but less than 4 years 6 months old on September 1, who are enrolled and identified after the **September count date** and are reported on the **March count**, will be eligible for 50 per cent ECS base instruction funding.

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 22 visits to the family home for a minimum of 1.5 hours each to be considered equivalent to a basic 475-hour 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 programming**.

REFERENCES

Early Childhood Services Regulation

Guide to Education: ECS to Grade 12

Kindergarten Program Statement

ECS Fact Sheets

Note: see Part 10, Section 10.1 – Reporting Requirements and Information in this manual.

Section 1.2 — Grades 1 – 12 Base Instruction Funding

ALLOCATION FORMULA

1. Grades 1 – 9

# of **funded students** in Grades 1 – 9	X	(	applicable grade level base instruction rate + applicable grade level class size rate*)

*Note: **Accredited funded private schools** and Hutterite colony schools are not eligible for class size funding.

2. Grades 10 – 12

a. # of Tier 1 **CEUs** for **funded students**	**X**	Tier 1 **CEU** Rate
Plus,		
b. # of Tier 2 **CEUs** for **funded students**	**X**	Tier 2 **CEU** Rate*
Plus,		
c. # of Tier 3 **CEUs** for **funded students**	**X**	Tier 3 **CEU** Rate*
Plus,		
d. # of Tier 4 **CEUs** for **funded students**	**X**	Tier 4 **CEU** Rate
Plus,		
e. # of Tier 5 **CEUs**** for **funded students**	**X**	Tier 5 **CEU** Rate
Plus,		
f. # of **funded students** who are special needs or coded 550 or 640	**X**	**High School Base Rate**
Plus,		
g. # of **CEUs** for ADLC courses	**X**	44% of the Tier **CEU** Rate

*Note: As Tiers 2 and 3 include class size funding, all **accredited funded private schools** are funded at the Tier 1 **CEU** rate.

**Note: As identified through the use of the dual enrolment flag (DEF) within PASIprep

See Part 9, Section 9.1 and 9.3 for applicable funding rates.

ALLOCATION CRITERIA

1. **School authorities** must provide students with access to:
   a. up to 950 hours of instruction for Grade 1;
   b. a minimum of 950 hours of instruction for Grades 2 to 9;
   c. a minimum of 1,000 hours of instruction for Grades 10 to 12; and
   d. a minimum of 25 hours of instruction per high school credit timetabled for both the student and teacher in the same time period. (Exception 7b. of this section).

2. 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.

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

4. High school courses taken by Grade 9 students in a summer program prior to the start of their Grade 10 Fall **term** will not be included in the calculation of the 45 **credit enrolment unit (CEU)** annual limit for funding outlined in Allocation Criteria 7 of this section.

5. The Superintendent and Secretary-Treasurer of **school jurisdictions** are required to sign and submit to School Finance a **Declaration of Management** (Form 18AE1.2c) on an annual basis.

6. A student may be funded for an academic program associated with an **activity program** offered outside of Alberta (but in Canada) if:
   a. the student meets the criteria of a **funded student**;
   b. the **activity program** is not offered in Alberta;
   c. the student was selected by **audition** or another substantive selection method to be part of the program; and
   d. a signed **education services agreement** has been submitted to School Finance Branch by November 15.

7. Criteria for funding for eligible students in Grades 10 to 12:
   a. Funding is provided on a **CEU** basis for senior high school courses as follows:
      i. Credit Value 1 = 1 **CEU**
      ii. Credit Value 3 = 2.5 **CEUs**
      iii. Credit Value 5 = 5 **CEUs**

      Funding is based on the CEU funding tiers listed in Section 10.1, and on the rates listed in Sections 9.1 and 9.3. Note: Tiers 2 and 3 **CEUs** include class size funding and, therefore, only apply to **school jurisdictions** and not to **accredited funded private schools**.

   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:
      i. 80 hours for a five credit course; or
      ii. 48 hours for a three credit course.

      Schools participating in the Moving Forward with High School Redesign Project are exempt from the 25 hour per credit requirement. (Registered apprenticeship program, work experience, and special projects courses are exceptions to these rules – see the *Guide to Education* for more details).

   c. Funding is provided for a maximum of 45 **CEUs** per student per year (September to August). Students are not restricted in the number of credits they can take in a **school year**. For funding purposes, such as block funding, 35 **CEUs** is considered a full-time program.

   d. Funding is provided for Alberta Distance Learning (ADL) courses paid by a **school authority** for students whose marks are reported by the Alberta Distance Learning Centre (ADLC).

e. Funding is provided for off-campus education programs, and other credit courses involving substantial off-campus instruction (see *Guide to Education*).

f. Knowledge and Employability (K&E) course credits completed and credits completed for any remaining Integrated Occupational (IO) courses will be funded at 8/5 times the Tier 1 **CEU** rate.

g. ESL **funded students** registered on the **September count date** who are coded as 301 or 303 and enrolled in at least one of the following ESL courses: ESL 1120, 1121, 1122, 1123 or 1125, will be funded at the rate of 17.5 Tier 1 **CEUs** per student per semester for ESL courses taken. These students are also eligible for ESL funding (Section 1.6). No additional funding is provided for other courses completed during these semesters. Also:

i. If an ESL **funded student** (as described above) is not enrolled in at least one ESL course, they will be funded on a **CEU** basis for the non-ESL courses taken.
ii. ESL **funded students** (as described above) who are enrolled in an outreach or **online program** will not be funded at the rate of 17.5 Tier 1 **CEUs**. These students will be funded on a **CEU** basis.
iii. ESL students taking courses during the summer **term** will be funded on a **CEU** basis.

h. Funding is provided for credits granted through **challenge assessments** at 20 per cent of the **CEU** value for the course(s) challenged. Funding will not be provided for **challenge assessments** and course completions for the same subject in the same semester.

i. **High school base rate** funding is provided for:

i. **students with special needs**;
ii. students in an **Institution** (code 550);
iii. **refugee students** (code 640) (Exception 7 (j) of this section); and
iv. students on a one-year **reciprocal exchange program**.

REVISED

j. **Refugee students** enrolled in home education programs, **shared responsibility programs**, **outreach programs**, print-based distance education or **online programs** are not eligible for **high school base rate** funding.

REVISED

k. **Students with special needs** are funded at the greater of 35 **CEUs** or actual **CEUs** earned.

l. 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.

m. Funding is provided for Alberta **funded students** enrolled with a Lloydminster school division high school on the **September count date**.

n. Additional funding will be provided for credits completed in the summer for high school students identified with special needs, Institutional students or the 600 grants code.

o. Funding is provided for locally developed senior high school credit courses where instruction is provided and if the **school jurisdiction** is authorized to deliver the course.

p. High school courses taken by junior high students will not be funded unless they are taken in the summer semester prior to entering Grade 10.

q. Funding is only provided for students registered in an **outreach program** when in junior or senior high school grades.

r. Funding is not provided for waived or retroactive credits for high school courses.

s. Approved heritage language **accredited funded private schools** are eligible to receive **CEU** funding for high school language courses but are not eligible for any other funding provided by Alberta Education to **accredited funded private schools**.

t. Tier 5 funding at a rate of $250 per **CEU** for **public school authorities** and a rate of $175 per **CEU** for Level 2 **accredited funded private schools** will be provided for **funded students** taking

approved, eligible **dual enrolled dual credit** programming. Top-up funding at a rate of $59.15 per Tier 5 **CEU** will be provided for students taking approved, eligible **dual enrolled dual credit** programming in schools operating under the High School Redesign mode and students in First Nations/**First Nation Education Authorities**.

8. Criteria for funding high school courses:
   a. High school courses delivered to students and claimed for funding must meet the conditions in this funding manual, The *Guide to Education*: *ECS to Grade 12* and all other Alberta Education legislation, regulations and policies.

   b. A regular course (non-career technology studies) submitted as complete (COM) or withdrawn (WDR) is considered completed for funding purposes when:
      i. a student has earned a final mark of 50 per cent or greater in the course; or
      ii. a student has earned a final mark of 25 per cent or greater but less than 50 per cent in the course, and has attended at least 50 per cent of the classes in the course or has worked on and been assessed on at least 50 per cent of the course content. When a student changes from one course to another within an academic program in the same **term** (e.g. student switches from Social Studies 10-1 to Social Studies 10-2), **school authorities** shall only claim one course for funding.

   For diploma examination courses, (i) and (ii) only apply to the school-awarded portion of the mark.

   c. A one-credit career technology studies (CTS) course submitted as COM, incomplete (INC) or WDR is considered completed for funding purposes when a student has worked on and been assessed on at least 50 per cent of the course content.

   d. Funding is provided for repeated courses if the funding criteria in this section are met and the previous course mark was less than 100 per cent.

   e. Funding will not be provided for any course if the prerequisite(s) was not completed and/or waived in the same **term** or a prior **term**.

   f. For regular courses submitted as COM or WDR and delivered to students online or by distance learning, the attendance funding criteria may not apply (refer to 9 b.).

   g. For all regular and CTS courses, **school**s 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.

   h. Work Experience courses will be funded when the student has earned a mark of 25 per cent or greater.
      i. the student has completed a minimum of 75 hours on the worksite to be funded for their first 3 credits.
      ii. the student has completed a minimum of 25 hours for each credit earned thereafter to a maximum of 250 hours (10 credits).
      iii. when the student works a total number of hours not divisible by 25 hour increments, the school will be funded for the lowest number of credits earned (e.g., if a student works 112 hours, they will be funded for a 4 credit course for the 100 hours worked, regardless if they registered for a higher credit course. To achieve 5 credits, the student would have to work for at least 125 hours).
      iv. time sheets for Work Experience must be recorded and signed by the student and the employer.

   i. Funding will not be provided for an off-campus course if the prerequisite HCS3000; Workplace Safety Systems is not completed by the student prior to the student's placement in the first off-campus learning experience. Students enrolled in Knowledge and Employability off-campus education courses may use Workplace Readiness 10-4 in lieu of HCS3000: Workplace Safety Systems as the prerequisite.

9. Course Completion Status Codes:
   All course submissions for funding require a course completion status code. The following describes the status codes:
   a. A 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.
   b. A 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.
   c. An INC status should be used when a student does not withdraw from a CTS course yet does not demonstrate mastery of all the learner expectations identified in the Programs of Study. An incomplete status has no associated mark(s).

10. **CEU** Funding Recovery Schedule:
    a. A 10 per cent funding recovery will be applied for violation of requirement of access to a minimum number of instructional hours as follows:
       i. courses where access to instruction is found to be less than 25 hours per high school credit or 20.8 hours per credit for a 3-credit course;
       ii. when a **school** timetables several high school courses in the same block and the access to instruction for courses offered is found to be less than 25 hours per credit;
       iii. courses/classes with unreasonably high enrolments where it is determined that it is not reasonable or possible for a large number of students to have access to 25 hours of instruction per credit; and
       iv. where a high school student does not have access to at least 1,000 hours of instruction.
    b. A 100 per cent funding recovery will be applied when:
       i. courses taught did not follow the Programs of Study;
       ii. a **school** that has been assessed a penalty previously, continues to be non-compliant; or
       iii. courses have both access to instruction and Programs of Study contraventions.
    c. A 75 per cent funding recovery will be applied when Special Projects do not meet the programming requirements set out in the *Guide to Education*: ECS to Grade 12.

FEES AND DEDUCTIONS

1. Alberta School Boards Association

   The Alberta School Boards Association (ASBA) has requested 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 $6,727.50 basic fee charged to each **school jurisdiction**.

   If a **school jurisdiction** 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.

2. Deduction for System Administration and Board Governance

   Alberta Education will be processing a deduction from **school jurisdiction** payments equivalent to 10 per cent of boards' allowable administration maximum. The deduction will be calculated based on total expenditures in the 2016/17 audited financial statements. For the 2018/19 **school year**, the total deduction will be recovered from the monthly payments from September 2018 to March 2019.

NEW

3. Employer Contribution to Local Authority Pension Plan

Local Authorities Pension Plan (LAPP) made the decision to reduce contribution rates by 1 per cent for both employers and employees effective January 1, 2018.

The employer contribution from participating **school jurisdictions** was estimated to decrease by $8.8 million each year. As a result, education's expense target was reduced by the same amount each year over the next three years.

Government provides over 90 per cent of **school jurisdictions'** revenues. In a consolidated financial environment, the reduction of Education's expense target must be transferred to **school jurisdictions**.

Alberta Education will therefore process a payment reduction to each of the participating **school jurisdictions** totaling $8.8 million.

The amount of the payment reduction is estimated based on the proportion of each participating jurisdiction's non-certificated employees to the total number of non-certificated employees of all jurisdictions reported in their 2016/17 audited financial statements.

The future year payment reductions will be re-calculated based on the number of non-certificated employees reported in **school jurisdictions'** audited financial statements.

REFERENCES

Guide to Education — ECS to Grade 12

See Part 10, Section 10.1 – Reporting Requirements and Information in this manual

Section 1.3 — Home Education Funding

ALLOCATION FORMULA

1. Home Education

Home Education Allocation	=	# of **Home Education Students** Grades 1 to 12	X	Home Education Rate

PLUS

a. For Grades 7 to 12
50 per cent of ADL course costs to a maximum equivalent of Home Education Rate.

b. For Grades 1 to 6

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

2. **Shared Responsibility Program** Grades 1 to 9

Shared Responsibility Program Allocation for each **funded student**	=	(	% of the Home Education Program	X	Home Education Rate	)

PLUS

The % of school program (min. 50%)	X	(	Applicable grade level Base Instruction Rate	+	Applicable grade level Class Size Rate	)

PLUS

The ADL course cost that exceeds 50 per cent of the Home Education rate the **associate board** or **associate accredited funded private school** provides to the home education **parents** (Up to a maximum of the student's pro-rated Home Education Funding amount).

3. **Shared Responsibility Program** Grades 10 to 12

Shared Responsibility Program Allocation for each **funded student**	=	(	% of Home Education Program	X	Home Education Rate	)
PLUS the lesser of:						
a.		The % of the school program (min. 20 %)		X	**High School Base Rate**	
or						
b.		**CEUs** completed		X	The applicable Tier **CEU** rate	
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 for elementary, junior high and senior high school levels described in the Alberta Programs of Study or stated in the schedule attached to the Home Education Regulation, and be supervised by an **associate board** or **associate accredited funded private school**.
2. The **associate board** or **associate accredited funded private school** must provide the **resident board** information through PASI and Student Records.
3. Home education funding is provided to support the education of Alberta students from Grade 1 to Grade 12.
4. An **associate board** or **associate accredited funded private school** must offer to the **parents** of a **home education student** not less than 50 per cent of the home education funding amount for the purchase of instructional materials.
5. For a **home education student** enrolled by the **associate board** or **associate accredited funded private school** in ADL courses at the ADLC at the **parents**' direction, the **school board** may use some or all of the **parents**' 50 per cent funding to pay for the cost of these courses and required instructional materials. The **associate board** or **associate accredited funded private school** may claim costs for ADL courses that exceed the **parents**' 50 per cent funding.
6. For **home education students** in Grades 7 to 12 enrolled by the **associate board** or **associate accredited funded private school** in ADL courses at the ADLC, the funding provides for 50 per cent of the cost of printed ADLC course costs to a maximum equivalent to the home education funding amount. This funding may be claimed on Form 18AE1.3a.
7. When a **home education student** in Grades 7 to 12, who is taking ADL courses through the ADLC, moves from one **associate board** or **associate accredited funded private school** to another after the **September count date**, and the receiving **associate board** or **associate accredited funded private school** also enrols the student in ADL courses through the ADLC; Alberta Education will pay 50 per cent of the eligible ADL course costs combined for both **associate board**s, up to a maximum equivalent to the home education funding amount.
8. **Home education students** and their **parents** must reside in Alberta on the **September count date** of the current **school year**.
9. **Home education students** in **accredited funded private schools** are not eligible for severe disabilities funding.

REFERENCES

Home Education Regulation

Home Education Handbook

Home Education Regulation Notification Form

Standards for Home Education Reimbursement Form

See Part 10, Section 10.1 – Reporting Requirements and Information in this manual

ADDITIONAL ALLOCATIONS FOR DIFFERENTIAL COST FACTORS

Section 1.4 — Outreach Funding

ALLOCATION FORMULA

Outreach Allocation	=	# of approved **outreach programs** in the **school jurisdiction**	X	Outreach Funding Rate

ALLOCATION CRITERIA

1. Outreach funding is subject to Alberta Education's approval of the **outreach program** by Field Services Branch by March 31 of the prior year.
2. Students in an **outreach program** may also complete courses in other programs or **schools**.
3. The *Outreach Programs Handbook* provides assistance in developing an outreach application.
4. The Application to Operate a New Outreach Program can be found in the *Outreach Programs Handbook.*

REFERENCES

Alberta Education Programs of Study

Guide to Education

Outreach Programs Handbook

See Part 10, Section 10.1 – Reporting Requirements and Information in this manual.

Section 1.5 — ECS Program Unit Funding (PUF)

ALLOCATION FORMULA

1. For **school jurisdictions** the funding amount paid will be the lesser of:
   a. the program unit ceiling amount; or
   b. the actual costs.
2. For **private ECS operators** the funding amount paid will be the lesser of:
   a. the program unit ceiling amount;
   b. the approved budget; or
   c. the actual costs.
3. a. Calculation of the ceiling amount for a program unit with one PUF child:
   i. Centre-Based Programming;

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

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

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

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 3 a. (i) or (ii), whichever is applicable.

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

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

c. calculation of the ceiling amount when a child's program starts after September 30 or ends before May 25 will be the lesser of the following ceiling calculations:
   i. a pro-rated ceiling based on the number of months of the child's PUF program multiplied by $2,505 per month; or
   ii. the ceiling calculation as shown in 3 a. (i) or (ii) – whichever is applicable.

d. maximum funding for a program unit child is based on 800 hours of centre-based programming or 36 **family-oriented programming** sessions or combination thereof.

ALLOCATION CRITERIA

1. PUF may be paid to a **school authority** for each eligible **child with a severe disability/delay** for a maximum of three years.

REVISED

2. To be eligible for funding, a **child with a severe disability/delay** must be at least 2 years 8 months of age and less than 6 years of age on September 1.

3. **School authorities** must use the *Special Education Coding Criteria* to determine the child's eligibility and proper coding.

4. All **ECS operators** use the Program Unit Funding (R.669) SharePoint site to submit required documentation, locate resources and receive announcements about the Program Unit Funding application process.

   Private ECS operators will upload all required PUF eligibility documentation for each child to the PUF SharePoint, for pre-approval, prior to submission of a PUF application.

REVISED

   Public **school authorities** (including Designated Special Education **ECS programs**) are responsible for determining PUF eligibility. Submission of the PUF application completes that authority level decision making and responsibility. All required PUF eligibility documentation for each child is maintained at the **school authority** level. PUF eligibility documentation is uploaded to the PUF SharePoint for each child identified for review in the annual PUF audit. The annual PUF audit (including **school jurisdiction** DSEP and DSEP **Private ECS operators**) occurs following the PUF budget deadline of November 30. Budget submission is not required for **school jurisdictions** but is required for **private ECS operators** including those with DSEPS and **accredited funded private schools** including those with DSEPS.

REVISED

5. Payment is based on approval of a PUF application. Each **school authority** is only allowed to submit one PUF application that lists all children who are eligible for PUF. The deadline to submit the PUF application is November 15 (15 days prior to the budget deadline).

6. For monitoring purposes, Alberta Education will incorporate a random review of actual PUF costs.

REVISED

7. Only one **school authority** will be funded for a PUF eligible child for the same time period. When a PUF child moves from one **school authority** to another one, the first **school authority** must revise the child's program end date on the PUF application and update the registration information in PASI. The second **school authority** must submit a PUF application for the time the child is with them and update the registration information in PASI.

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 he/she is counted; and
   b. is eligible to enter Grade 1 under the **school** entrance age policy of the **school authority**; 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 placement for the PUF child.
9. **Designated Special Education ECS programs** must comply with all Allocation Criteria outlined in this section. Also, 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 PUF will apply.
10. A **funded child** receiving PUF is not eligible for ECS mild/moderate funding.

REFERENCES

ECS Fact Sheets

Special Education Coding Criteria is available to **school authorities** through the Education website at www.education.alberta.ca. Please select "Special Needs Funding ECS-12 (669) under "My Applications" after you have signed in.

Guide to Education

Standards for the Provision of Early Childhood Special Education

To request access to the PUF SharePoint Site: sign in on the Education website at www.education.alberta.ca and click on the "My Applications" icon. Select the "organization profile request box" and request "Authority level access" to Program Unit Funding (R.669) extranet role. Please ensure the Authorized Representative at your authority (e.g. Secretary-Treasurer) signs the form.

See Part 10, Section 10.1 – Reporting Requirements and Information in this manual.

Section 1.6 – English as a Second Language Funding (ESL)

ALLOCATION FORMULA

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

ALLOCATION CRITERIA

1. ESL funding may be claimed for **funded children/students** who require additional English language supports and instruction to achieve grade level expectations in English and other subject areas. Annual assessment documentation must be kept on file at the **school** that supports the coding and funding of these students.
2. **Funded children/students** eligible for ESL funding must be coded either:
   a. Foreign born code 301; or
   b. Canadian born code 303.
3. Two enrolment counts are taken for ESL funding, one on the **September count date**, and another on the **March count date**. Each count will be used for funding 50 per cent of the **school year** except, if the **March count** of ESL students is lower than the **September count**, then the **September count** will be used for the entire **school year**.
4. ESL **funded children** between the ages of 3 years 6 months and 4 years 6 months on September 1 that are identified after the **September count date** and reported on the **March count** will be eligible for 50 per cent ECS ESL funding and 50 per cent of the ECS base instruction funding.

REVISED

5. Funding is provided for a maximum of 5 years for eligible ESL **funded children/students**. ESL coding should be maintained for as long as the child/student requires ESL support, even after the ESL funding for that **funded child/student** has been exhausted. The need for ongoing ESL supports is determined by the results of an English language proficiency assessment that is administered annually.
6. **Funded students** enrolled in home education, **shared responsibility, outreach** or **online programs** are not eligible for funding under this section

REFERENCES

English as a Second Language (ESL)

Funding for Early Learners: ESL/Francisation

ESL Fact Sheet

K-12 ESL Proficiency Benchmarks

See Part 10, Section 10.1 – Reporting Requirements and Information in this manual.

Section 1.7 — Francisation Funding (Francophone Regional Authorities only)

ALLOCATION FORMULA

Francisation Allocation	=	# of eligible Francisation **FTE** **funded children/students**	X	**Francisation** Rate

ALLOCATION CRITERIA

1. **Francisation** funding may be claimed for **funded children/students** who require additional French Language supports and instruction to achieve grade level expectations in Français and other subject areas. Annual assessment documentation must be kept on file at the **school** that supports the coding and funding of these students.
2. **Funded children/students** eligible for **Francisation** must be coded either:
   a. Foreign born – code 307; or
   b. Canadian born – code 306
3. Two enrolment counts are taken for **Francisation** funding, one on the **September count date** and another on the **March count date**. Each count will be used for funding 50 per cent of the **school year**, except if the **March count** of **Francisation** students is lower than the **September count**, then the **September count** will be used for the entire **school year**.
4. **Francisation funded children** who are between the ages of 3 years 6 months and 4 years 6 months old on September 1, that are identified after the **September count date** and reported on the **March count**, will be eligible for both 50 per cent ECS **Francisation** funding and 50 per cent ECS base instruction funding.

REVISED

5. Funding will be provided for a maximum of 5 years for each **Francisation** eligible **funded child/student**. Coding for **Francisation funded children/students** should be maintained even after the Francisation funding for that **funded child/student** has been exhausted.
6. **Funded students** enrolled in home education, **shared responsibility, outreach** or **online programs** are not eligible for funding under this section.
7. **Francophone Regional Authorities** may claim **Francisation** and ESL funding for the same child/student.

See Part 10, Section 10.1 – Reporting Requirements and Information in this manual.

REFERENCES

Francisation - Foire aux questions

Francisation Proficiency Benchmarks

Section 1.8 — First Nations, Métis and Inuit (FNMI) Education Funding

Please see Section 4.1 for the information previously located in this area.

Section 1.9 — Socio-Economic Status (SES) Funding

ALLOCATION FORMULA

SES Allocation	=	Incidence Rate	X	**FTE funded enrolment**	X	SES Rate

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

School Jurisdiction	SES Incidence Rate
Almadina School Society	0.500
Aspen View Public School Division No. 78	0.224
Aurora School Ltd.	0.165
Battle River Regional Division No. 31	0.195
Black Gold Regional Division No. 18	0.180
Boyle Street Education Centre	1.000
Buffalo Trail Public Schools Regional Division No. 28	0.184
Calgary Arts Academy Society	0.156
Calgary Girls' School Society	0.130
Calgary Roman Catholic Separate School District No. 1	0.185
Calgary School District No. 19	0.218
Canadian Rockies Regional Division No. 12	0.219
CAPE – Centre for Academic and Personal Excellence Institute	0.226
Chinook's Edge School Division No. 73	0.191
Christ the Redeemer Catholic Separate Regional Division No. 3	0.178
Clearview School Division No. 71	0.178
Connect Charter School Society	0.201
East Central Alberta Catholic Separate Schools Regional Division No. 16	0.194
East Central Francophone Education Region No. 3	0.203
Edmonton Catholic Separate School District No. 7	0.237

School Jurisdiction	SES Incidence Rate
Edmonton School District No. 7	0.256
Elk Island Catholic Separate Regional Division No. 41	0.153
Elk Island Public Schools Regional Division No. 14	0.175
Evergreen Catholic Separate Regional Division No. 2	0.177
Foothills School Division No. 38	0.180
Fort McMurray Public School District No. 2833	0.187
Fort McMurray Roman Catholic Separate School District No. 32	0.175
Fort Vermilion School Division No. 52	0.200
Foundations for the Future Charter Academy Charter School Society	0.186
Golden Hills School Division No. 75	0.221
Grande Prairie Roman Catholic Separate School District No. 28	0.181
Grande Prairie School District No. 2357	0.219
Grande Yellowhead Public School Division No. 77	0.218
Grasslands Regional Division No. 6	0.185
Greater North Central Francophone Education Region No. 2	0.229
Greater St. Albert Roman Catholic Separate School District No. 734	0.165
High Prairie School Division No. 48	0.280
Holy Family Catholic Regional Division No. 37	0.247
Holy Spirit Roman Catholic Separate Regional Division No. 4	0.211
Horizon School Division No. 67	0.193
Lakeland Roman Catholic Separate School District No. 150	0.242
Lethbridge School District No. 51	0.227
Living Waters Catholic Regional Division No. 42	0.221
Livingstone Range School Division No. 68	0.221
Lloydminster Public School Division	0.200
Lloydminster Roman Catholic Separate School Division	0.200
Medicine Hat Roman Catholic Separate School District No. 21	0.211
Medicine Hat School District No. 76	0.231
Mother Earth's Children's Charter School Society	0.214
New Horizons Charter School Society	0.114
Northern Gateway Regional Division No. 10	0.207
Northern Lights School Division No. 69	0.227
Northland School Division No. 61	0.298
Northwest Francophone Education Region No. 1	0.206
Palliser Regional Division No. 26	0.191
Parkland School Division No. 70	0.172
Peace River School Division No. 10	0.238
Peace Wapiti School Division No. 76	0.194
Pembina Hills Regional Division No. 7	0.198
Prairie Land Regional Division No. 25	0.182
Prairie Rose School Division No. 8	0.224
Red Deer Catholic Regional Division No. 39	0.203
Red Deer Public School District No. 104	0.232
Rocky View School Division No. 41	0.145
St. Albert Public School District No. 5565	0.178
St. Paul Education Regional Division No. 1	0.195
St. Thomas Aquinas Roman Catholic Separate Regional Division No. 38	0.225

School Jurisdiction	SES Incidence Rate
Sturgeon School Division No. 24	0.182
Suzuki Charter School Society	0.169
The Southern Francophone Education Region No. 4	0.191
Valhalla School Foundation	0.194
Westmount Charter School Society	0.121
Westwind School Division No. 74	0.205
Wetaskiwin Regional Division No. 11	0.231
Wild Rose School Division No. 66	0.205
Wolf Creek School Division No. 72	0.223

Section 1.10 — Inclusive Education Funding

This funding supports inclusive education to ensure **school jurisdictions** have the flexibility to support the unique needs of every **funded child/student**.

School jurisdictions are eligible for all four allocations below. **Charter schools** are only eligible for the additional per student allocation (#4 below)

SCHOOL JURISDICTION ALLOCATION FORMULA

Inclusive Education	=	Supports and Services Allocation	+	Differential Modifiers Allocation	+	Program Equity Allocation	+	Additional Per Student Allocation

1. SUPPORTS AND SERVICES ALLOCATION

   This component provides funding for supports and services that benefit all students in an inclusive education system, such as instructional and community supports.

FTE Funded Enrolment	X	Supports and Services Rate

2. DIFFERENTIAL MODIFIERS ALLOCATION

   This component recognizes differential modifiers that address diversity factors that vary across **school jurisdictions** to ensure an equitable distribution of funding. These modifiers are research-based incidence indicators in three areas: socio-economic, diagnostic and geographic

Differential Factor Funding	Data Source	Funding Trigger
Average Income	Statistics Canada	If below provincial average
% Who Own Dwelling	Statistics Canada	If below provincial average
Mothers' Average Years of Education	Statistics Canada	If below provincial average
% Lone Parent Families	Statistics Canada	If above provincial average
% Parents No Degree / Certificate	Statistics Canada	If above provincial average
Low Weight for Gestational Age	Alberta Health	If in highest tier
First Nations, Métis and Inuit	Self-Identified	If above provincial average
Refugee* (max. funding – 5 yrs)	Immigration, Refugees and Citizenship Canada	If children/students are identified
Children In Care	Alberta Human Services	If above provincial average
Distance	Alberta Education / Jurisdictions	If central office > than 40 km from a major centre

*see definition of **Refugee Student** in the Glossary

3. PROGRAM EQUITY ALLOCATION

   If the 2018/19 Inclusive Education funding for supports and services plus differential modifiers is less than what a **school jurisdiction** received in 2011/2012 funding for severe disabilities profile plus ECS mild/moderate and ECS gifted/talented, the **school jurisdiction** will receive a program equity allocation equal to their 2012/2013 program equity allocation adjusted for enrolment.

4. ADDITIONAL PER STUDENT ALLOCATION (for **school jurisdictions** and **charter schools**

FTE Funded Enrolment	**X**	Additional Per Student Rate

ALLOCATION CRITERIA

1. **School jurisdictions** are eligible for funding under all four allocation components in this section. **Charter schools** are only eligible for the additional per student funding allocation.
2. Program unit **funded children** are not counted for funding under this section.
3. **Accredited funded private schools** and **private ECS operators** are not eligible to receive funding under this section.
4. To receive inclusive education funding for **refugee** children/students, children/students must be coded as 640. **Refugee** children/students will be included in the inclusive education funding calculation for a maximum of five years.
5. **School jurisdiction** inclusive education allocation amounts and grant calculation sheets are available in the Alberta Education Stakeholder File Exchange.

Section 1.11 — Northern Allowance Funding

ALLOCATION FORMULA

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

ALLOCATION CRITERIA

1. Northern allowance funding is provided to eligible **school jurisdictions** based on the **FTE funded enrolment** of all schools located in their respective zones. Funding for eligible level 2* **accredited funded private schools** is based on **FTE funded enrolment**.
2. Zones are described as follows:
   a. Lower Zone – **schools** located between the 55th and 56th parallels of latitude.
   b. Intermediate Zone – **schools** located between the 56th and 57th parallels of latitude.
   c. Upper Zone – **schools** located north of the 57th parallel of latitude.
3. The zone in which a **school** is located is determined from the legal land description of the physical location of the **school.**
4. **Funded 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 18AE3.0

Section 1.12 — Small Schools by Necessity Funding

Metro school jurisdictions and Charter Schools are not eligible for this funding.

ALLOCATION FORMULA

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

1. TOTAL BASE ALLOCATION

   a. for each school with a **FTE funded enrolment** of 150 or fewer, the base allocation = $88,281.
   b. for each school with a **FTE funded enrolment** greater than 150 but fewer than 226, the base allocation is calculated as follows:

$$\text{Base Allocation} = \$88{,}281 - \left[\left(\frac{\$88{,}281}{76}\right) \times \left(\textbf{FTE funded enrolment} - 150\right)\right]$$

The total base allocation is the sum of a. and b. for all **school**s in each category.

2. TOTAL VARIABLE ALLOCATION

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

TABLE 1

Grade Category	School Rate	Peak Enrolment	Small School **FTE funded enrolment** Limit	# of Grades in the Grade Configuration
K to 3	$588.54	40	80	3.5
K to 6	$1,650.36	80	150	6.5
K to 9	$1,884.96	80	220	9.5
K to 12	$2,943.72	80	290	12.5

Once each **school** is categorized, the data from table 1 is used in the following formulas to calculate the variable allocation for each **school**.

Variable Allocation = Unadjusted **FTE funded enrolment** rate **X** Grade Factor **X** **FTE funded enrolment**

Where

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

And

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

a.

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

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

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

Where

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

The total variable allocation is the sum of a. and b. for all **schools** in each category.

3. TOTAL NUMBER OF SMALL SCHOOLS
   The total number of small schools is the total number of **schools** in the **school jurisdiction** that have been allocated funding for either the base or variable allocations, or both.

4. TOTAL NUMBER OF SMALL SCHOOLS BY NECESSITY

   For funding purposes, each small school (identified in # 3) is deemed to be 'necessary' or 'not necessary' based on the transportation of its **FTE weighted enrolment** to nearby receiving schools in accordance with the following rules:

   a. the **distance** from the small school to the receiving schools must be within 25 km for **schools** in rural areas, and within 6 km for **schools** in urban areas. Urban areas are defined as Edmonton, Calgary, Red Deer, Lethbridge, Medicine Hat, Fort McMurray, Grande Prairie, St. Albert, Sherwood Park, Spruce Grove, and Stony Plain.

   b. the receiving schools must have available capacity to accommodate the additional students. Available capacity at a receiving school is defined as 100 per cent of the **school building** capacity, less the **FTE weighted enrolment**. School capacity is calculated as according to the School Capital Manual and includes only instructional space.

   c. the small school **FTE weighted enrolment** can be designated to a maximum of two 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 number of small schools by necessity is the total number of **schools** that do not meet all three conditions.

5. CLOSED SCHOOLS ALLOCATION

   Those closed schools that would have qualified as a Necessity Small School are provided funding at declining rates as follows:

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

6. Students enrolled in **schools of choice** such as **outreach**, home education, alternative programs and Hutterite colony schools are not counted for funding under this section.
7. **School jurisdiction** Small Schools by Necessity Grant Calculation Sheets are available on the Alberta Education Stakeholder File Exchange.

Section 1.13 — Small Board Administration Funding

ALLOCATION FORMULA

Funding is provided to eligible **school jurisdiction**s using a., b. or c. below:

Small **School Board** Administration Allocation **=**

a. $470,825.88 for a **school jurisdiction** (excluding **charter schools**) with **FTE funded enrolment** of 2,000 students or less

OR

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

$$\$470{,}825.88 - \left[\ \$470.83 \times \left(\ \textbf{FTE funded enrolment} - 2{,}000\ \right)\ \right]$$

OR

c. For **charter schools** use the following formulas:

FTE Funded Enrolment	Allocation Formula
i. Less than 500	$193,837
ii. Between 500 - 2,000	(i) + [$107 X (Enrolment - 500)]
iii. Between 2,001 - 3,000	(i) + (ii) – [$464 X (Enrolment – 2,000)]
iv. Greater than 3,000	No Small Board Administration Allocation

Section 1.14 — Equity of Opportunity Funding

ALLOCATION FORMULA

Equity of Opportunity	=	Per Student Allocation	+	Density Allocation	+	Distance Allocation

1. PER STUDENT ALLOCATION

REVISED

The greater of **$60,000*** or	**FTE Funded Enrolment**	**X**	**$101**

School jurisdictions, **charter schools**, **accredited funded private schools** and **private ECS operators** are eligible for funding under the Per Student allocation. Level 1 and 2 **accredited funded private schools** receive 60 per cent and 70 per cent, respectively, of the **school jurisdiction** rate.

Home education students are not counted for this allocation.

***School jurisdictions** and **charter schools** receive a minimum of $60,000 under this allocation. Note: The minimum of $60,000 does not apply to **accredited funded private schools** and **private ECS operators**.

2. DENSITY ALLOCATION

$$\left(\frac{\textbf{Effective Transportation Area}}{\textbf{FTE Equity of Opportunity Enrolment}}\right) \times \textbf{FTE Remote Rural Enrolment} \times \$420$$

Only **school jurisdictions** with **schools** in population centres of less than 5,000 people are eligible for funding under the **Density** allocation.

Effective transportation area is the same as that used in the calculation of rural transportation funding.

FTE remote rural enrolment is defined as **funded children/students** enrolled in **schools** in population centres comprised of fewer than 5,000 people.

The following are not eligible for funding under the **Density** allocation: **charter schools**, **accredited funded private schools**, **private ECS operators**, home education programs, **online programs** (Code 620), institutional programs (Code 550) and Hutterite colony **schools**.

3. DISTANCE ALLOCATION

(One-way distance of **school** to closest Major Service Centre **–** 40 kms)	**X**	**FTE Equity of Opportunity Enrolment**	**X**	**$1.45**

Only **school jurisdictions** and **charter schools** with **schools** that are farther than 40 kilometers from a Major Service Centre are eligible for funding under the Distance allocation.

The following are not eligible for funding under the distance allocation: **accredited funded private schools**, **private ECS operators**, Home Education programs, **online programs** (Code 620), institutional programs (Code 550) and Hutterite colony **schools**.

A major service centre is defined for this allocation as Calgary, Edmonton, Grande Prairie, Lethbridge, Medicine Hat and Red Deer.

Section 1.15 — Hutterite Colony Schools Funding

ALLOCATION FORMULA

Hutterite Colony **School** Funding	=	# of colony **schools** with **funded children/students**	X	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 and Governance Division, for permission to levy a fee on individual Hutterite colonies.

Before making application, **school jurisdictions** must have:

1. pooled all funding associated with the colony **school(s)** – this includes Hutterite colony **schools** funding, base instruction funding, socio-economic status funding, etc.; and
2. proof of consultation with the Hutterite colony affected when developing the application.

Section 1.16 — Francophone Equivalency Funding (Francophone Regional Authorities)

ALLOCATION FORMULA

Francophone Equivalency Access (FEA) Funding	=	Eligible # of **funded students** Grade 1 - 12	X	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 1.17 — Plant Operations and Maintenance (School Jurisdictions)

ALLOCATION FORMULA

Plant Operations and Maintenance Allocation = [Base Line Funding X (1 + **Sparsity-Distance** Factor)] + Travel Time Allowance + Small Schools by Necessity Differential

1. <u>BASELINE FUNDING</u>

   The POM calculation is based on the following rates applied to the **FTE funded enrolment** taken from the **Frozen Funded Head Count** of the previous year. For the purpose of this grant;

   a. a student in an **online program** (code 620) is not included;

   b. an ECS **funded child** with severe disabilities (PUF) is counted at 1.5 FTE.

Grades	Rate per Funded FTE
K – 6	$795.30
7 – 9	$751.18
10 – 12	$755.38

2. SPARSITY-DISTANCE FACTOR

This component makes adjustments for sparsity and **distance** factors in each jurisdiction. The following table provides the Sparsity-Distance Index for each **school jurisdiction**.

Sparsity-Distance Index Table

School Jurisdiction	Sparsity-Distance Index
Almadina School Society	1.00
Aspen View Public School Division No. 78	1.03
Aurora School Ltd.	1.00
Battle River Regional Division No. 31	1.02
Black Gold Regional Division No. 18	1.00
Boyle Street Education Centre	1.00
Buffalo Trail Public Schools Regional Division No. 28	1.04
Calgary Arts Academy Society	1.00
Calgary Girls' School Society	1.00
Calgary Roman Catholic Separate School District No. 1	1.00
Calgary School District No. 19	1.00
Canadian Rockies Regional Division No. 12	1.02
CAPE – Centre for Academic and Personal Excellence Institute	1.00
Chinook's Edge School Division No. 73	1.02
Christ the Redeemer Catholic Separate Regional Division No. 3	1.02
Clearview School Division No. 71	1.04
Connect Charter School Society	1.00
East Central Alberta Catholic Separate Schools Regional Division No. 16	1.03
East Central Francophone Education Region No. 3	1.07
Edmonton Catholic Separate School District No. 7	1.00
Edmonton School District No. 7	1.00
Elk Island Catholic Separate Regional Division No. 41	1.00
Elk Island Public Schools Regional Division No. 14	1.00
Evergreen Catholic Separate Regional Division No. 2	1.01
Foothills School Division No. 38	1.00
Fort McMurray Public School District No. 2833	1.06
Fort McMurray Roman Catholic Separate School District No. 32	1.06
Fort Vermilion School Division No. 52	1.13
Foundations for the Future Charter Academy Charter School Society	1.00
Golden Hills School Division No. 75	1.01
Grande Prairie Roman Catholic Separate School District No. 28	1.05
Grande Prairie School District No. 2357	1.04
Grande Yellowhead Public School Division No. 77	1.04
Grasslands Regional Division No. 6	1.02

School Jurisdiction	Sparsity-Distance Index
Greater North Central Francophone Education Region No. 2	1.07
Greater St. Albert Roman Catholic Separate School District No. 734	1.00
High Prairie School Division No. 48	1.04
Holy Family Catholic Regional Division No. 37	1.05
Holy Spirit Roman Catholic Separate Regional Division No. 4	1.03
Horizon School Division No. 67	1.04
Lakeland Roman Catholic Separate School District No. 150	1.04
Lethbridge School District No. 51	1.02
Living Waters Catholic Regional Division No. 42	1.03
Livingstone Range School Division No. 68	1.02
Lloydminster Public School Division	1.02
Lloydminster Roman Catholic Separate School Division	1.02
Medicine Hat Roman Catholic Separate School District No. 21	1.02
Medicine Hat School District No. 76	1.02
Mother Earth's Children's Charter School Society	1.00
New Horizons Charter School Society	1.00
Northern Gateway Regional Division No. 10	1.03
Northern Lights School Division No. 69	1.04
Northland School Division No. 61	1.09
Northwest Francophone Education Region No. 1	1.09
Palliser Regional Division No. 26	1.02
Parkland School Division No. 70	1.00
Peace River School Division No. 10	1.07
Peace Wapiti School Division No. 76	1.07
Pembina Hills Regional Division No. 7	1.02
Prairie Land Regional Division No. 25	1.07
Prairie Rose School Division No. 8	1.07
Red Deer Catholic Regional Division No. 39	1.01
Red Deer Public School District No. 104	1.01
Rocky View School Division No. 41	1.00
St. Albert Public School District No. 5565	1.00
St. Paul Education Regional Division No. 1	1.03
St. Thomas Aquinas Roman Catholic Separate Regional Division No. 38	1.01
Sturgeon School Division No. 24	1.00
Suzuki Charter School Society	1.00
The Southern Francophone Education Region No. 4	1.04
Valhalla School Foundation	1.00
Westmount Charter School Society	1.00
Westwind School Division No. 74	1.03
Wetaskiwin Regional Division No. 11	1.01
Wild Rose School Division No. 66	1.04
Wolf Creek School Division No. 72	1.02

3. TRAVEL TIME ALLOWANCE

   This component allows for maintenance staff travel time and is determined by taking the previous year's travel time allowance amount and adding any grant rate increase to it.

4. SMALL SCHOOLS BY NECESSITY (SSBN) DIFFERENTIAL

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

      i. SSBN Differential X K - 6 per cent of total funded enrolments X $795.30 per student

      ii. SSBN Differential X Gr. 7 – 9 per cent of total funded enrolments X $751.18 per student

      iii. SSBN Differential X Gr. 10 – 12 per cent of total funded enrolments X $755.38 per student

   b. Each **school's** SSBN Differential is determined as follows:

      i. **school's** capacity less **school's** enrolment,

      ii. the total SSBN differential is the sum of the SSBN differentials calculated for each **school**.

   School capacity is calculated as according to the School Capital Manual and includes only instructional space.

   The "per cent of total funded enrolments" is calculated by dividing the previous year funded enrolment for the grade range by the total previous year funded enrolment (across all grades) for the **school jurisdiction**. The jurisdiction's previous year "funded enrolments" are calculated using the same criteria as for the baseline funding component.

   The SSBNs used in this formula are those that qualified for SSBN funding in the previous **school year**.

5. Metro **school jurisdictions** and **charter schools** are not eligible for the SSBN component of this funding.

6. **School jurisdictions** that provide permanent leased space to another **school authority** for educational purposes and that receive infrastructure maintenance and renewal funding for that space in lieu of lease support funding, will receive an adjustment/increase to its plant operations and maintenance funding allocation to recognize the ongoing insurance and administrative costs associated with the leased space.

7. **School jurisdictions** will be advised of their allocation amount by email from the School Finance Branch. Plant operations and maintenance grant calculation sheets are available on the Alberta Education Stakeholder File Exchange.

Section 1.18 — Charter Schools Funding

ALLOCATION FORMULA

The funding formula and rates under Part 1, Part 4, Part 5, Part 6, Part 7, Part 8 and Part 9 that apply to **school jurisdictions** also apply to **charter schools**. However, **charter schools** are not eligible to claim funding under Sections 1.3 (Home Education), 1.12 (Small Schools by Necessity), and 7.4 (Debt Retirement).

ALLOCATION CRITERIA

1. BASE INSTRUCTION FUNDING

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

2. TRANSPORTATION

   a. A **charter board** can enter into a **transportation agreement** with a **school jurisdiction** for student transportation. Under such an agreement, the local **school jurisdiction** may claim funding for the transportation of the **charter school** students as if they were students of 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 transported **eligible passengers** at the metro urban regular transportation rate.

   c. **Charter boards** that 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 school jurisdiction**, the base **density** rate provided per **eligible passenger** transported for which the **board** of that **rural school jurisdiction** 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.

   d. For parent-provided transportation, a **charter board** must have signed agreements/contracts in place and on file by October 31. The amount that a **parent** is reimbursed must take into consideration the transportation funding the authority receives for the student along with the cost of providing comparable service.

3. Funding for an ECS **child with mild/moderate disabilities/delays** or a child who is gifted and talented attending **charter schools** is provided based on the eligibility of the individual child and on the mild/moderate disabilities/delays, gifted and talented rates in Section 9.2. **Charter schools** must comply with the Conditions and Requirements outlined in Section 2.2.

4. Funding for **students with severe disabilities** attending **charter schools** is provided based on the eligibility of individual students and on the severe disability rates in Section 9.3. **Charter schools** that have **students with a severe disability** must comply with the Conditions and Requirements outlined in Section 3.3.

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

REFERENCES

Charter Schools Regulation

Charter Schools Handbook

TRANSPORTATION

Section 1.19 — Boarding Funding

ALLOCATION FORMULA

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

ALLOCATION CRITERIA

1. The **parents** of the eligible **funded student** must reside in the **school jurisdiction**.
2. Boarding funding is paid if the **funded student** is directed by a **board** to attend a **school** in Alberta under Section 53 of the *School Act* or a program of studies prescribed by the **Minister** and as a result of attending that **school** the student is unable to live in the residence of the student's **parent**.
3. Funding for boarding is not paid to a **school jurisdiction** for a **resident student** who is:
   a. attending a **private school** outside Alberta when the education program has not been previously approved by the **Minister**; or
   b. enrolled after the **September count date**;
   c. boarded after November 30.

Section 1.20 — Rural Transportation Funding

SECTION UNDER REVIEW

ALLOCATION FORMULA

1. A rural **school jurisdiction** may apply for the following rural transportation funding:
   a. Rural Transportation Support

i.	**Basic** Allocation	=	**Eligible passenger/Eligible Transported ECS Child**	X	Applicable Rural Transportation Rate	

PLUS

ii.	**Distance** Allocation	=	Applicable **Eligible Transportation Distance** (kms) for each **Eligible passenger/Eligible Transported ECS Child**	X	Applicable **Distance** Rate	

Total rural transportation support is the sum of the amounts calculated in i) and ii) above multiplied by the applicable **weighting factor** for each **eligible passenger** and **eligible transported ECS child**.

b. Inter-School Transportation Support

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

Inter School Allocation	=	Daily kms (not including deadhead kms) of inter school transportation for the bus	X	# of days of inter-school transportation in the **school year** for the bus	X	Support Rate

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

SECTION UNDER REVIEW

c. Cooperative Transportation

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

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

If a cooperative **transportation agreement** between two jurisdictions is terminated, transportation funding for students in both jurisdictions will remain at the per student rate that existed when the agreement was in place excluding cooperative transportation funding.

d. Bus Modification or Purchase Allowance to Accommodate Wheelchair Passengers

Refer to Section 1.23 – Special Transportation

ALLOCATION CRITERIA

1. General

a. Funding is provided for an **eligible passenger** or **eligible transported ECS child** who resides in a rural area or a city, town, village or hamlet with a population of less than 10,000 (per most recent Municipal Affairs census). For municipalities with a population of 10,000 or greater refer to Section 1.21 Urban Transportation.

b. Where the net support for student transportation of a **board** decreases in excess of 3 per cent as a result of a community population reaching 10,000 or as a result of movement between **density** grid columns, an adjustment may be determined for that jurisdiction based on the amount greater than 3 per cent.

REVISED

c. For parent-provided transportation, rural **school jurisdictions** must have signed agreements/contracts in place and on file by October 31. The amount that a **parent** is reimbursed must take into consideration the transportation funding the jurisdiction receives for the student along with the cost of providing comparable service. Parent-provided transportation agreements/contracts cannot include any provisions that allow a **school jurisdiction** to withhold any portion of the reimbursement owed to the **parent**, as per the terms of the agreement/contract, as compensation for any outstanding amount owed by the **parent** to the **school jurisdiction**.

d. Funding is not provided for a **funded student** counted under Section 1.23 Special Transportation or a **funded child** counted under Section 1.25, ECS Special Transportation.

e. **Eligible passengers** with severe disabilities who ride on a regular route **school bus** will be claimed under this section using the rural transportation rate and are not eligible for funding under Section 1.23, Special Transportation.

Students with disabilities who cannot, because of the severity of their disability, ride a regular route **school bus** can be claimed under Section 1.23, Special Transportation. (NOTE: all students on designated buses must be claimed under the same section.)

f. **First Nations Students who reside on a reserve** are not eligible for transportation funding.

2. Rural Transportation Funding

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

If the student is directed by the **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:

i. **Alternative French language programs** (including French immersion and bilingual programs) and **other language immersion programs**;

SECTION UNDER REVIEW

ii. Special education programs to meet the needs of **students with severe disabilities**;

iii. Special education programs to meet the needs of students with mild/moderate disabilities and gifted and talented students when **board** criteria have been met;

iv. 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 (i.e., mechanics, fabrication studies, cosmetology and construction technology).

If a **board** directs a **funded student** to a **school** outside their jurisdiction for any of the program considerations above then an **education service agreement** is required.

b. The eligible **distance** criteria does not apply in the following situations:

i. An employee of a **school jurisdiction** accompanying a **student with a severe disability** or a **child with a severe disability/delay** who is transported to and from **school**.

ii. A **student/child with a severe disability** (except those coded as 45 or 47) requiring transportation to and from **school** and who is unable to walk safely to **school** as a result of their disability.

c. If a **resident student** of a **board** is enrolled in a **school** of the **parent's** choice outside the attendance area or transportation service in which the student resides, eligibility for transportation support is determined by the **distance** to the **school** nearest the student's residence.

d. Where a **board** has adopted over-lapping **school** attendance or transportation service areas, eligibility for funding is determined by the **distance** to the **school** nearest the student's residence.

e. If a student who is not a **resident student** of the **board** accesses that **board**'s transportation system within the **school jurisdiction** boundaries of the **school** they are attending 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.

f. 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** and 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.

g. 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 jurisdictions**, 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.

h. If a **board** is providing transportation services under a cooperative bussing arrangement with another **board** and the two **board**s are not sharing a co-terminus area, the area of the **board** receiving transportation services will be added to the transporting **board's effective transportation area** when determining the **density** rating for the transporting **board**.

i. Rural Transportation Funding is available only to rural **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.

j. A **board** transporting an **eligible passenger** of another **board** under a **transportation agreement** to the **designated school** of the **eligible passenger's resident board**, who resides outside the transportation service area of the **resident board** and accesses the bus route of the transporting **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**.

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

SECTION UNDER REVIEW

REVISED

3. ECS Transportation

   a. A **school jurisdiction** that claims ECS regular transportation funding must transport, or make arrangements for the transport of, **funded children** attending **ECS programs**.

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

   c. ECS **children with disabilities/delays** who require special transportation will be funded at the ECS special transportation rate. Transportation funding for these children must be claimed under Section 1.25, ECS Special Transportation.

4. Inter-School Transportation

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

      i. the course of study is prescribed by the **Minister**;

      ii. the course of study requires a special **school** facility or a facility with equipment not available at the **school** of daily attendance for those students; and

      iii. the course of study requires the use of the special **school** facility or the specially equipped facility for at least 18 consecutive weeks.

   b. Outdoor education programs, recreational programs, and intermittent bussing between **schools** or to such activities as hockey or swimming programs are not eligible for inter-school transportation support.

5. Students in an **online program** or **outreach program** where they are accessing 50 per cent or more of their educational program at a **school** of the **board** or students in a shared responsibility program, that are transported by the **board** to a **school**, may be claimed as **eligible passengers** under Rural Transportation.

DOCUMENTATION AND REPORTING REQUIREMENTS

1. Rural **school jurisdictions** are required to submit electronically a rural funding application to the Business Operations and Stakeholder Support Branch by November 30. Payment is made on the basis of the submitted information, rural transportation allocation criteria and funding rates and in accordance with the *School Act* and the *School Transportation Regulation*.

   Note: the rural funding application includes the rural special transportation section. Refer to Section 1.23 Special Transportation for rural special transportation allocation criteria.

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

3. Only **funded students** and **funded children** enrolled on the **September count date** are eligible for funding. Special consideration for the **September count date** may be given to **school jurisdictions** experiencing exceptional growth in transportation needs.

4. For purposes of calculating **density** support, the **effective transportation area** of the **school jurisdiction** is that taken as of the **September count date**.

SECTION UNDER REVIEW

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:
   a. 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. individual bus route lists that includes stop locations and students transported;
   d. a list of names of **eligible transported ECS children** transported by bus and the names and grades of **eligible passenger**s;
   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 completed route risk assessment forms;
   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**.

Section 1.21 — Urban Transportation Funding

ALLOCATION FORMULA

1. An urban **school jurisdiction** may apply for the following urban transportation funding:
   a. URBAN TRANSPORTATION SUPPORT

i.	Basic Allocation	=	**Eligible passenger/Eligible Transported ECS Child**	**X**	Applicable Urban Transportation Rate

PLUS

ii.	**Distance** Allocation	=	Applicable **Eligible Transportation Distance** (kms) for each **Eligible passenger/Eligible Transported ECS Child**	**X**	Applicable **Distance** Rate

Total urban transportation support is the sum of the amounts calculated in i) and ii) above multiplied by the applicable **weighting factor** for each **eligible passenger** and **eligible transported ECS child**. Note: the weighting factor and **distance** support only applies for students transported by yellow **school bus**.

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

   b. INTER-SCHOOL TRANSPORTATION SUPPORT

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

Inter-School Support	=	Daily kms (not including deadhead kms) of inter-school transportation for the bus	+	# of days of the inter-school transportation in the **school year** for the bus	**X**	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

SECTION UNDER REVIEW

In addition to the regular urban transportation funding (above), boards that are transporting **eligible passengers/eligible transported ECS children** by yellow **school bus** as part of an urban cooperative bussing arrangement to a **school** of the **board** or to another **school jurisdiction**, are eligible for the following funding incentive:

# of **eligible passenger/eligible transported ECS children** transported by yellow **school bus** under an urban cooperative bussing arrangement	**X**	15% of the applicable Urban Transportation Base Rate

Both **school jurisdictions** must have a minimum of 10 per cent of the **eligible passengers/eligible transported ECS children** on an urban route in order for the route to be considered cooperative.

d. BUS MODIFICATIONS

For bus modification or purchase allowance to accommodate wheelchair passengers, refer to Section 1.23, Special Transportation.

2. **Francophone Regional Authorities** within an Urban Area

To recognize the dispersion of students for a **Francophone Regional Authority** within an urban **school jurisdiction** a weighted factor of 3.5 will be used for Francophone **eligible passengers**

(Grades 1 – 12) and Francophone **eligible transported ECS children**.

Francophone Urban Transportation Allocation	=	(Francophone **eligible passenger** Grades 1 to 12	+	Francophone **eligible transported ECS children**)	**X**	3.5 (weighted factor)	**X**	Urban Francophone transportation rate

ALLOCATION CRITERIA

1. General

a. Funding is provided for an **eligible passenger** or **eligible transported ECS child** who resides in a city, town, village or hamlet with a population of 10,000 or greater (per most recent Municipal Affairs census). For municipalities with a population of less than 10,000 refer to Section 1.20, Rural Transportation.

REVISED

b. For **parent**-provided transportation, urban **school jurisdictions** must have signed agreements/contracts in place and on file by October 31. The amount that a **parent** is reimbursed must take into consideration the transportation funding the jurisdiction receives for the student along with the cost of providing comparable service. Parent-provided transportation agreements/contracts cannot include any provisions that allow a **school jurisdiction** to withhold any portion of the reimbursement owed to the **parent**, as per the terms of the agreement/contract, as compensation for any outstanding amount owed by the **parent** to the **school jurisdiction.**

c. Funding shall not be paid under this section for a **funded student** who is counted under Section 1.23, Special Transportation Funding, or a **funded child** who is counted under Section 1.25, ECS Special Transportation.

d. **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 1.23, Special Transportation.

Students with disabilities who cannot, because of the severity of their disability, ride a regular route **school bus** can be claimed under Section 1.23, Special Transportation. (NOTE: all students on designated buses must be claimed under the same section).

e. **First Nations Students who reside on a reserve** are not counted for transportation funding.

SECTION UNDER REVIEW

2. Urban Transportation Funding

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

If the student is directed by the **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:

i. **Alternative French language programs** (including French immersion and bilingual programs) and **other language immersion programs**;

ii. Special education programs to meet the needs of **students with severe disabilities**;

iii. Special education programs to meet the needs of students with mild/moderate disabilities and gifted and talented students when **board** criteria have been met;

iv. 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 (i.e., mechanics, fabrication studies, cosmetology, and construction technology).

If a **board** directs a **funded student** to a school outside their jurisdiction for any of the program considerations above then an **education service agreement** is required.

b. The eligible **distance** criteria does not apply in the following situations:

i. An employee of a **school jurisdiction** accompanying a **student with a severe disability** or a **child with a severe disability/delay** who is transported to and from **school**.

ii. A **student/child with a severe disability** (except those coded as 45 or 47) requiring transportation to and from **school** and who is unable to walk safely to **school** as a result of their disability.

c. If a **resident student** of an urban **school jurisdiction** is enrolled in a **school** of the **parent's** choice outside the attendance area or transportation service area in which the student resides, eligibility for transportation support is determined by the **distance** to the **school** nearest the student's residence.

d. Where a **board** has adopted over-lapping **school** attendance or transportation service areas, eligibility for funding is determined by the **distance** to the **school** nearest the student's residence.

e. If a **board** of an urban **school jurisdiction** transports students residing less than 2.4 kilometers from the **school** within the attendance area or transportation service area in which the students reside, to a **school** other than the **school** within the attendance area or transportation service area in which the students reside because the enrolment of that **school** is equal to or greater than its rated capacity, then the number of students transported that is equal to or greater than the number of students not resident within the attendance area or transportation service area and enrolled in that **school** shall be deducted from the number of **eligible passengers** claimed for funding under this section.

f. An urban **school jurisdiction** may receive funding for a student who is not a **resident student** of the **board** who accesses the **board's** transportation system within the **school jurisdiction** boundaries of the **school** they are attending, at a point that is 2.4 kilometers or more from the **school** in which the student could be enrolled.

g. If an urban **school jurisdiction** 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.

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

3. ECS Transportation

SECTION UNDER REVIEW

   a. A **school jurisdiction** that claims ECS regular transportation funding must transport or make arrangements for the transport of, **funded children** attending **ECS programs**

   b. 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**.

   c. ECS **children with disabilities/delays** who require special transportation will be funded at the ECS special transportation rate. Transportation funding for these children must be claimed under Section 1.25, ECS Special Transportation.

4. Inter-School Transportation

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

      i. the course of study is prescribed by the **Minister**;

      ii. the course of study requires a special **school** facility or a facility with equipment not available at the **school** of daily attendance for those students; and

      iii. the course of study requires the use of the special **school** facility or the specially equipped facility for at least 18 consecutive weeks.

   b. Outdoor education programs, recreational programs, and intermittent bussing between **school**s or to such activities as hockey or swimming programs are not eligible for inter-school transportation support.

5. Students in an **online program** or **outreach program** where they are accessing 50 per cent or more of their educational program at a **school** of the **board** or students in a **shared responsibility program**, that are transported by the **board** to a **school**, may be claimed as **eligible passengers** under urban transportation.

DOCUMENTATION AND REPORTING REQUIREMENTS

1. Urban **school jurisdictions** are required to submit electronically an urban funding application to the Business Operations and Stakeholder Support Branch by November 30. Payment is made on the basis of the submitted information, urban transportation allocation criteria and funding rates, and in accordance with the *School Act* and the *School Transportation Regulation*.

   Note: the urban funding application includes the urban special transportation section. Refer to Section 1.23, Special Transportation Funding, for urban special transportation allocation criteria.

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

3. Only **funded students** and **funded children** enrolled on the **September count date** are eligible for funding. Special consideration for the **September count date** may be given to **school jurisdictions** experiencing exceptional growth in transportation needs.

NEW

4. For purposes of calculating **density** support, the **effective transportation area** of the **school jurisdiction** is that taken as of the **September count date.**

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.

   a. geographic roadway maps of overall attendance areas and transportation service areas;

   b. location of each student's residence (street addresses in towns, villages and hamlets);

   c. individual bus route lists that includes stop locations and students transported;

SECTION UNDER REVIEW

d. a list of names of **eligible transported ECS children** transported by bus and the names and grades of **eligible passenger**s;

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 completed route risk assessment forms;

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**.

Section 1.22 — Metro Urban Transportation Funding

ALLOCATION FORMULA

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

(Residential Area x 75.80)	+	(**Funded students** and **funded children** X 0.7300)	=	
LESS,				
0.75 (# ECS Elem. Schools)	X	Lesser of: Average ECS-Elem. School enrolment in the jurisdiction or the average school enrolments for the 4 metro urban jurisdictions	=	
0.400 (# of Jr. High Schools)	X	Lesser of: Average Jr. High School enrolment in the jurisdiction or the average school enrolments for the 4 metro urban jurisdictions	=	
0.250 (# of Sr. High Schools)	X	Lesser of: Average Sr. High School enrolment in the jurisdiction or the average school enrolments for the 4 metro urban jurisdictions	=	
		Expected Eligible passengers	=	

SECTION UNDER REVIEW

b. The Metro Urban Transportation Funding a metro urban district may receive is determined as follows:

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

c. ECS **funded children** will be included in the metro urban transportation funding formula with the following adjustments to the coefficients/benchmarks:

i. the average elementary **school** size will be adjusted to include ECS **funded children**;

ii. the walk percentage will be reduced from 0.80 for elementary **school**s to 0.75 for ECS – elementary **school**s; and

iii. the eligible enrolment coefficient will be reduced from 0.735 to 0.730.

ALLOCATION CRITERIA

1. Edmonton School District No.7, Edmonton Catholic Separate School District No. 7, Calgary School District No. 19 and Calgary Roman Catholic Separate School District No. 1 are eligible for metro urban transportation funding.
2. Funding is determined using a “benchmark” that is calculated based on the school enrolment for the current **school year**. The benchmark is the lesser of two values: the jurisdiction’s average school enrolment or the average school enrolment in the four metro urban 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 **school**s by level;
   c. the number of **funded students** and ECS **funded children**;
   d. the residential area; and
   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 **school**s 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.

SECTION UNDER REVIEW

6. Metro urban **school jurisdictions** in Calgary and Edmonton which are transporting **eligible transported ECS children** to **board**-operated programs will be eligible for transportation funding under the metro urban transportation funding. The ECS enrolments will be included in the formula.
7. ECS **children with disabilities/delays** who require special transportation will be funded at the ECS Special Transportation rate. Transportation funding for these children must be claimed under Section 1.25, ECS Special Transportation. ECS **children with a severe disability/delay** who qualify for PUF cannot be included in the count of **students with severe disabilities** in the metro urban transportation formula.
8. Funding shall not be paid under this section for a **funded student** who is counted under Section 1.23, Special Transportation Funding, or a **funded child** who is counted under Section 1.25, ECS Special Transportation Funding.
9. Metro urban **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.
10. When a metro urban **school jurisdiction** accesses metro urban transportation funding and has under its jurisdiction an area included in another municipality, the metro urban **school jurisdiction** 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 **school jurisdiction** that is currently submitting a claim under this section and is seeking to claim either Section 1.20, Rural Transportation funding or Section 1.21, Urban Transportation funding must have approval from the **Minister**. Requests for approval should be submitted to the Business Operations and Stakeholder Support Branch.
11. A metro urban **school jurisdiction**, 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 **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.
    a. geographic roadway maps of overall attendance areas and transportation service areas;
    b. location of each student's residence (street addresses in towns, villages and hamlets);
    c. individual bus route lists that include stop locations and students transported;
    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 completed route risk assessment forms
    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.

Section 1.23 — Special Transportation Funding (Gr. 1-12)

SECTION UNDER REVIEW

ALLOCATION FORMULA

1. a. Urban Special Transportation:

Special Transportation Allocation	=	# of **students with disabilities** transported (see Allocation Criteria 1)	X	Urban Special Rate

b. Rural Special Transportation:

Special Transportation Allocation	=	# of **students with disabilities** transported (see Allocation Criteria 1)	X	Rural Special Rate

c. Weekend Transportation

Weekend Transportation Allocation	=	# of **students with disabilities** transported on a weekend	X	Weekend Transportation Rate

d. Bus modification or purchase allowance to accommodate wheelchair passengers:

Funding is provided to **school jurisdictions** for up to 100 per cent of approved costs for the purchase of a wheelchair lift or ramp to be installed on a new or used bus that is transporting students to and from **school** on a regular route. 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 with disabilities** riding on a bus designated only for the transportation of those **students with disabilities** who cannot, because of the severity of their disability/delay, use regular transportation services described in Sections 1.20 Rural Transportation Funding or 1.21 Urban Transportation Funding.
2. All **school jurisdictions** (rural, urban and metro urban) transporting **children with disabilities/delays** shall claim ECS special transportation funding under Section 1.25.
3. Program or **school** location shall not be considered when determining eligibility for this funding.
4. Special transportation funding is provided for **students with disabilities** who require special transportation between their residences or boarding places and:
   a. the **school** of a **school jurisdiction**;
   b. an **accredited funded private school**; or
   c. A program at an **Institution** operated and/or funded by Alberta Education:
      i. which the student with a disability has been directed to attend by the **school jurisdiction** because the **school jurisdiction** does not operate a suitable program, or
      ii. which is the closest suitable and available program offered.
5. To claim special transportation funding for a **student with a disability** attending an **accredited funded private school**, the **school jurisdiction** must have directed the student to attend that **school**.
6. For parent-provided transportation, **school jurisdictions** must have signed agreements/contracts in place and on file by October 31. The amount that a **parent** is reimbursed must take into consideration the transportation funding the jurisdiction receives for the student along with the cost of providing comparable service. **Parent**-provided transportation agreements/contracts cannot include any provisions that allow a **school jurisdiction** to withhold any portion of the reimbursement owed to the **parent**, as per the terms of the agreement/contract, as compensation for any outstanding amount owed by the **parent** to the **school jurisdiction**.

REVISED

SECTION UNDER REVIEW

7. Weekend transportation funding is provided to **school jurisdictions** when **students with disabilities** are transported on weekends between their permanent residences and their boarding places by their **parents** and are attending:
   a. the **school** of a **school jurisdiction**; or
   b. an **accredited funded private school**.

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

DOCUMENTATION AND REPORTING REQUIREMENTS

1. **School jurisdictions** are required to electronically submit 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 *School Transportation Regulation*.

   Please note that:
   a. Rural special transportation information (including weekend and boarding funding, if applicable) will be reported on the rural funding application.
   b. Urban special transportation information (including weekend and boarding funding, if applicable) will be reported on the urban funding application.
   c. ECS special transportation, refer to Section 1.25.
2. Transportation support payments for each new **school year** will be paid at 100 per cent of the previous year's funded monthly amount until review of the new funding application has been completed. If the new funding application has not been received by December 31, the January payment will be reduced to 75 per cent of the previous year funded monthly amount retroactive to September 1 and continued until the new funding application is received and reviewed.
3. Only **funded students** enrolled on the **September count date** are eligible for funding. Special consideration on the **September count date** may be given to **school jurisdictions** experiencing exceptional growth in transportation needs.
4. **School jurisdictions** are required to retain the following information on file for a minimum of seven years and make it available for review by Alberta Education upon request.
   a. geographic roadway maps of overall attendance areas and transportation services areas;
   b. location of each student's residence (street addresses in towns, villages and hamlets, and where available in rural areas, and legal land descriptions in all other rural areas);
   c. individual bus route lists that includes stop locations and students transported;
   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**, and **charter schools**;
   h. copies of completed route risk assessment forms;
   i. copies of contracts with:
      i. written **transportation agreements** with agents, organizations, **parents** or other persons;
      ii. records showing the amount to be paid on behalf of **students with disabilities** who require special transportation;
      iii. agents providing special transportation for **students with disabilities**.

SECTION UNDER REVIEW

Section 1.24 — ECS Regular Transportation Funding (Private ECS 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 kilometres from the **ECS program** in which they are enrolled and are being transported will be eligible for this funding.
2. Transportation costs incurred for field trips or other activities cannot be claimed under this funding. For **children with severe disabilities/delays,** these costs can be claimed under Section 1.5, ECS Program Unit Funding.
3. A **private ECS operator** that claims ECS regular transportation funding must transport, or make arrangements for the transportation of, **funded children** attending **ECS programs**. Transportation funding cannot be claimed if the **private ECS operator** has not provided or arranged transportation or if there was no cost to the **private ECS operator** for the transportation provided.
4. If the transportation of an **eligible transported ECS child** is not done by the **private ECS operator**, then a contract or signed agreement must be in place by October 31 with the company or person(s) transporting the **eligible transported ECS child**.

REVISED

5. For **parent**-provided transportation, **private ECS operators** must have signed agreements/contracts in place and on file by October 31. The amount that a **parent** is reimbursed must take into consideration the transportation funding the jurisdiction receives for the child along with the cost of providing comparable service. **Parent**-provided transportation agreements/contracts cannot include any provisions that allow a **private ECS operator** to withhold any portion of the reimbursement owed to the **parent**, as per the terms of the agreement/contract, as compensation for any outstanding amount owed by the **parent** to the **private ECS operator**.
6. If transportation of an **eligible transported ECS child** is done by taxi or a teacher aide, the ECS regular transportation rate shall apply.
7. To apply for ECS regular transportation funding, **private ECS operators** are required to electronically submit their ECS transportation funding application to the Business Operations and Stakeholder Support Branch by October 31. Payment is made on the basis of the 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 1.20, Rural Transportation Funding; Section 1.21, Urban Transportation Funding; and Section 1.22, Metro Urban Transportation Funding.
8. For **ECS programs** beginning in September, transportation funding is based on **funded child** registration information as of the **September count date**.
9. For **ECS programs** beginning after September 30, the count date for transportation will be the last **operating day** of the month in which the program begins. The electronic ECS transportation claim form must be submitted to the Business Operations and Stakeholder Branch within three weeks of that date.
10. **Eligible transported ECS children** who are registered after the **September count date** are not eligible for regular transportation funding.
11. **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.

SECTION UNDER REVIEW

12. **ECS operators** are to maintain records of:
    a. names of children transported;
    b. copies of completed route risk assessment forms;
    c. actual costs of transportation; and
    d. copies of written **transportation agreements** with agents, organizations, **parents** or other persons.

Section 1.25 — ECS Special Transportation Funding (School Authorities)

ALLOCATION FORMULA

ECS Special Transportation to and from School

# of transported **children with disabilities/delays**	**X**	ECS Special Transportation Rate (per round trip – max. of 185 per child)

Funded children transported by a **parent** (agreement in place)	**X**	**Parent**-provided ECS Transportation Rate

Family-Oriented ECS Programming Transportation

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

ALLOCATION CRITERIA

1. Special Transportation
    a. **ECS operators** may receive ECS special transportation funding for ECS **children with disabilities/delays** who cannot be accommodated by regular transportation because of their disabilities and, therefore, require special transportation, such as a handi-bus.
    b. **Distance** and **school** location shall not be considered when determining eligibility for funding.
    c. Funding will be paid based on the number of days that a **child with a disability/delay** is transported to/from the **ECS program** up to a maximum of 185 days.
2. **Family-oriented programming** Transportation Funding
    a. This transportation funding is for each scheduled **family-oriented programming** session delivered by a teacher, a child development specialist, or a teacher assistant to the home of a **child with a severe disability/delay** receiving **family-oriented programming**.
    b. Transportation funding is provided for each session with a minimum of 4 sessions and a maximum of 36 sessions for each program unit funded child.
3. Transportation costs incurred for field trips or in-program activities cannot be claimed under this funding. For **children with severe disabilities/delays** these costs may be claimed under Section 1.5, ECS Program Unit Funding.

SECTION UNDER REVIEW

4. An **ECS operator** that claims ECS special transportation funding must transport, or make arrangements for the transportation of, **children with disabilities/delays** attending the **ECS program**. Transportation funding cannot be claimed if the **ECS operator** has not provided or arranged transportation or if no cost was incurred by the **ECS operator** to transport the children.
5. If the transportation of **children with disabilities/delays** is not done by the **ECS operator**, then a contract or signed agreement must be in place by October 31 with the company or person(s) transporting the children.

REVISED

6. For parent-provided transportation, **school authorities** must have signed agreements/contracts in place and on file by October 31. The amount that a **parent** is reimbursed must take into consideration the transportation funding the authority receives for the child along with the cost of providing comparable service. **Parent**-provided transportation agreements/contracts cannot include any provisions that allow a **school authority** to withhold any portion of the reimbursement owed to the **parent**, as per the terms of the agreement/contract, as compensation for any outstanding amount owed by the **parent** to the **school authority**.
7. When a **child with a disability/delay** is transported by their **parent(s)**, the parent-provided ECS transportation rate will apply.
8. When a **child with a disability/delay** is transported by taxi or by a teacher aide ECS Special Transportation funding may be claimed only if the decision for transporting by taxi or by aide is based on medical or safety reasons or because there are no other transportation options. Otherwise, transportation by taxi or aide will be paid at the regular transportation funding rate.
9. To apply for ECS special transportation funding:
    a. **Private ECS operators** are required to electronically submit their ECS transportation funding application to the Business Operations and Stakeholder Support Branch by October 31. Please note that the electronic ECS transportation funding application can be used to claim both ECS regular and ECS special transportation funding.
    b. **School jurisdictions** are required to electronically submit their ECS special transportation funding application to the Business Operations and Stakeholder Support Branch by November 30.

    Payment is made on the basis of the submitted information, funding allocation criteria and funding rates.
10. For **ECS programs** beginning in September: transportation funding is based on **funded child** registration information as of the **September count date**.
11. For **ECS program**s 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 three weeks of that count date.
12. **Children with disabilities/delays** who are registered after the **September count date** are not eligible for special transportation funding. Transportation costs for ECS **children with severe disabilities/ delays** eligible to receive PUF may be claimed as a Program Unit expense.
13. **ECS operators** are required to maintain records of:
    a. names of children transported;
    b. number of days each individual child is transported;
    c. number of **family-oriented programming** sessions;
    d. copies of completed route risk assessment forms;
    e. actual costs of transportation; and
    f. special transportation provided.

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

(Sections 2.1, 2.3, 2.4, 2.7 and 2.8 – see Table of Contents)

Section 2.2 — ECS Mild/Moderate Disabilities/Delays, Gifted and Talented Funding

ALLOCATION FORMULA

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

ALLOCATION CRITERIA

1. **Children with mild/moderate disabilities/delays** or those who are gifted and talented must be at least 3 years 6 months of age and less than 6 years of age on September 1.
2. Coding
   a. Code 30 mild/moderate disabilities/delays.
   b. Code 80 gifted and talented.

   School authorities will use the Special Education Coding Criteria to determine the child's eligibility and proper coding.
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 enrolled and identified after the **September count date** and are reported on the **March Count**, will be eligible for 50 per cent ECS mild/moderate or gifted and talented funding and 50 per cent ECS base instruction funding.
4. Funding is available for a maximum of two years which includes one year of **Kindergarten**.

REFERENCES

Guide to Education

Special Education Coding Criteria is available to **school authorities** through the Extranet

To request access to the SDF SharePoint site, sign in on the education website at www.education.alberta.ca. Click on the "My Applications" icon, select "Organizational Profile Request" box and request "Authority level access" to Severe Disabilities Funding (R.1038) extranet role. Ensure the form is signed by the Authorized Representative at your authority (e.g. Secretary Treasurer).

Standards for the Provision of Early Childhood Special Education

ECS Fact Sheets

See Part 10, Section 10.1 – Reporting Requirements and Information in this manual

Section 2.5 — ECS Plant Operations and Maintenance Funding (POM)

ALLOCATION FORMULA

# of **funded children**	**X**	POM rate for ECS

ALLOCATION CRITERIA

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

Section 2.6 — ECS Administration Funding

ALLOCATION FORMULA

Total ECS Funding	**X**	5.4%

ALLOCATION CRITERIA

1. Funding for administration is based on 5.4 per cent of the total ECS funding a **private ECS operator** receives from Alberta Education for the following areas:
   a. base instruction funding;
   b. special education needs (including mild/moderate and gifted and talented, and finalized program unit funding);
   c. transportation (special and regular);
   d. plant operations and maintenance; and
   e. English as a second language (ESL).

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

Part 3 – Funding for Accredited Funded Private Schools (Grades 1 to 12)

(Section 3.1 – Base Instruction: please refer to Section 1.2)

Section 3.2 — Base Instruction Funding for Designated Special Education Private Schools (DSEPS)

ALLOCATION CRITERIA

1. Base instruction funding is provided for **students with mild/moderate or severe disabilities** who are enrolled on the **September count date** and meet Alberta Education coding criteria as outlined in the *Special Education Coding Criteria*.

2. In order to receive the higher base instruction funding rate, **DSEPS** must advise **parent(s)** 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** (e.g., 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(s)** what type of special educational program the **resident board** can provide for the student; and

   c. if, after being advised of the special education program the **resident board** can provide, the **parent(s)** decide(s) to enrol their child in a **DSEPS**, the **parent(s)** must notify the **resident board** in writing that they are moving their child to a **DSEPS**.

NEW

3. **Parent** consultation with the **resident board** is required in the following circumstances:

   a. a student is leaving their resident board to attend a DSEPS.

   b. a student is entering a DSEPS for their first year at that DSEPS (previously attending a private school, charter school, alternate DSEPS or other non-resident school)

   In the case of students continuing in the same **DSEPS** as they attended in the preceding year, **resident board** consultation is not required as long as it was completed when the student entered the **DSEPS**.

REVISED

4. One of the following types of documentation must be provided by the **resident board** to the **DSEPS** and kept on file at the **DSEPS** to confirm the **parent** consultation occurred:

   a. A letter from the **resident board** official confirming that the **parent(s)** consulted with the board about the child's special education programming needs. The letter must contain the following information:

      - Name of parent(s) involved in the consultation.
      - Name of school authority, school, and school official that the parent(s) consulted.
      - Name of student the consultation was about.
      - Date that the consultation occurred.
      - Programming options discussed
      - Signature of school official

   b. Parent documentation of the consultation containing all information identified above in "a" signed by both the parent(s) and the school official.

5. **DSEPS** must notify each applicable **resident board**, in writing, of the **board's resident students** who are registered at the **DSEPS**. This list should indicate:
   a. which students' **parents** consulted with the **resident board** on the special education programming options for their **funded student** prior to enrolment at the **DSEPS**;
   b. which students are newly enrolled; and
   c. which students are currently attending who have been enrolled in previous years.
6. The **DSEPS** must submit a list of all students to the Director, School Finance Branch by October 15 identifying students:

REVISED

   a. whose **parent(s)** consulted with their **resident board** and attach documents referred to in criteria 4; and
   b. whose **parent(s)** did not consult with the **resident board**.

   Documents substantiating that consultation occurred do not have to be provided for returning students as long as they were provided in the year the student initially joined the **DSEPS**.
7. Base instruction funding rates for **DSEPS**:
   a. $11,639 per student with a **mild/moderate disability** when the **parent** has consulted with the **resident board** (grant codes 110 and the applicable 50 code);
   b. $7,537.59 per student with a **mild/moderate disability** when the **parent** enrols student without consulting the **resident board** (applicable 50 code);
   c. $7,537.59 per **student with a severe disability** (applicable 40 code).
8. Transfer of base instruction funding between jurisdictions and **DSEPS** is not required for students who move after the **September count date**.
9. An **accredited funded private school** wishing to become a **DSEPS** or a **DSEPS** wishing to add a new **school** site must submit a written request for approval by April 30 (of the prior school year) to the School Accreditation and Standards Branch stating their reasons for doing so. They must also indicate this intention on their Annual Operating Plan.

NEW

Note for 2018/19

In recognition that 2018/19 will be a transitionary year, the following exceptions will be made for the 2018/19 school year only:

- The deadline to submit documentation to confirm parent consultation will be extended from October 15, 2018 to December 15, 2018.
- Only children and students who are newly enrolled in the DSEPS in the 2018/19 school year will be reviewed for supporting documentation.
- Evidence of programming by the resident board in the form of an individualized program plan (IPP) or Individualized support plan (ISP) or similar document is sufficient to fulfill the parent consultation documentation if other evidence of consultation cannot be obtained for the 2018/19 year

Alberta Education will develop a standard form that parents, DSEPS operators, and school boards can use to satisfy the requirements that the parents are making an informed decision when they choose a DSEPS for their child.

REFERENCES

Special Education Coding Criteria is available to **school authorities** through the Alberta Education website at www.education.alberta.ca. Go to "My Applications" and the application titled Special Needs Funding ECS-12 (669).

To request access to the SDF SharePoint site, sign in on the education website at www.education.alberta.ca. Click on the "My Applications" icon, select "Organizational Profile Request" box and request "Authority level

access" to Severe Disabilities Funding (R.1038) extranet role. Ensure the form is signed by the Authorized Representative at your authority (e.g. Secretary Treasurer).

Standards for Special Education

See Part 10, Section 10.1 – Reporting Requirements and Information in this manual.

Section 3.3 — Severe Disabilities Funding for Private Schools (including DSEPS) and Charter Schools

ALLOCATION FORMULA UNDER REVIEW

# of approved **students with severe disabilities**	**X**	Severe Disability 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* 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 Learner Services Branch and on enrolment data as of the **September count date**.
3. All **accredited funded private schools** (including **DSEPS**) and **Charter schools** will use the Severe Disabilities Funding (SDF) (R.1038) SharePoint Site to submit required documentation, locate resources and receive announcements about the severe disabilities funding application process and deadlines. The eligibility of new students will be audited by the Learner Services Branch in the first year they are claimed for funding by an **accredited funded private school** or **charter school**. Once a student is approved for severe disabilities funding, auditing for eligibility by Alberta Education will occur no more than every three years, unless otherwise required to maintain funding. Previously approved students registering at a different authority will require re-approval at the new **school**.
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**, **shared responsibility 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. identification of the types of support and services being provided to **students with severe disabilities**. They must receive three or more **levels of support** to meet their educational needs; and
    d. a current **Individualized Program Plan (IPP)** or **Instructional Support Plan (ISP)**, based on the Requirements for Special Education in **accredited funded private schools**, that addresses the student's needs.
7. The following **students with severe disabilities** may be claimed on the **March count** and are eligible for 50 per cent of the severe disabilities funding rate:
    a. students who move from a **school jurisdiction** or an **institution** to an **accredited funded private school** or **charter school** after the **September count date**;

b. students who were not registered with any **school authority** on the **September count date** and who register in an **accredited funded private school** or a **charter school** after the **September count date**.

8. Funding must be transferred from an **accredited funded private school** or a **charter school** on a pro-rated 10-month basis for **students with severe disabilities** who transfer after the **September count date** to either a **school jurisdiction**, a different **accredited funded private school** or a **charter school**.

REFERENCES

*The Handbook for the Identification and Review of **Students with Severe Disabilities*** is found on the Extranet

Special Education Coding Criteria is available to **school authorities** through the Alberta Education website at www.education.alberta.ca. Go to "My Applications" and the application titled Special Needs Funding ECS-12 (669).

To request access to the SDF SharePoint site, sign in on the education website at www.education.alberta.ca. Click on the "My Applications" icon, select "Organizational Profile Request" box and request "Authority level access" to Severe Disabilities Funding (R.1038) extranet role. Ensure the form is signed by the Authorized Representative at your authority (e.g. Secretary Treasurer).

Requirements for Special Education in Accredited Funded Private Schools

Section 3.4 — Early Literacy Funding

ALLOCATION FORMULA

# of Grades 1 and 2 **funded students** on **September count date**	**X**	Early Literacy Rate

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 Initial Operating Plan/Annual Operating Plan (IOP/AOP) that they plan to provide early literacy programs for Grades 1 and 2.
3. **Accredited funded private schools** may use early literacy funding in the following ways:
   a. minimum of 85 per cent to hire additional human resources to support classroom teachers in giving at-risk students the additional programming and attention they need;
   b. maximum of 15 per cent to purchase early literacy resources or to provide in-service for **parents**, teachers or other staff 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. **Accredited funded private schools** are required to keep on file the number of students served and each student's level of achievement.
5. 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.

(Sections 3.5 to 3.9 – please refer to the Table of Contents)

Section 3.10 — Plant Operations and Maintenance Funding

ALLOCATION FORMULA

Plant Operations and Maintenance Funding	=	# of eligible **funded students**	X	Applicable Per Student Rate

ALLOCATION CRITERIA

1. Plant operations and maintenance funding is provided to Level 2* **accredited funded private schools**.
2. Funding is based on the # of **funded students** taken from the **frozen funded headcount** of the previous year.
3. For the purpose of this grant:
   a. a student in an **online program** (code 620) is not included; and
   b. a **home education student** is not included.
4. The applicable per student rate is based on the following grade groupings:
   a. Grades 1 to 6
   b. Grades 7 to 9
   c. Grades 10 to 12

   *as per Accountability and Declaration Form 18AE3.0

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Part 4 – First Nations, Métis and Inuit Funding

This section outlines funding that supports First Nations, Métis and Inuit (FNMI) Education and related information within one place rather than distributed throughout the funding manual.

Section 4.1 — FNMI – Education Funding

ALLOCATION FORMULA

FNMI Education Allocation	=	# of FNMI **FTE children/students**	**X**	FNMI Rate

ALLOCATION CRITERIA

REVISED

1. This funding is provided to assist **school jurisdictions** to provide system, program and instructional supports that improve education outcomes for First Nations, Métis and Inuit students.
2. First Nations, Métis and Inuit funding for **school jurisdictions** is based on the number of self-identified FNMI **FTE children/students**. Funding for level 2 **accredited funded private schools** is based on the number of self-identified FNMI **FTE students** only. Note: does not include FNMI **FTE children**.

REVISED

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

   These children/students are offered the option to self-identify through a signed declaration on the school registration form. **Schools** are then responsible to ensure that students and **parents** are provided with an opportunity annually to verify demographic information on the student record. This may be done in a variety of ways, depending on **school authority** procedures. For more information on annual verification, please see the *Information for School Authorities* document on the Aboriginal Student Self-Identification webpage.
4. **First Nations students who reside on a reserve** and who attend an Alberta **school** off reserve, are funded by the Government of Canada and do not qualify for funding under this section. These students should be coded 330 for funding purposes.
5. In addition to the 330 code, they should also be coded as 331 if they choose to self-identify for data collection purposes. Therefore, both codes may be entered for these individuals and the 330 code will override the 331 for funding purposes.
6. **Funded students** enrolled in home education or **shared responsibility** programs are not eligible for funding under this section.

REFERENCES

REVISED Aboriginal Student Self-Identification

Aboriginal Student Self-Identification Information for School Authorities: (www.education.alberta.ca/media/3704427/aboriginal-self-identification_sch-auth-faq_jan2017.pdf)

Section 4.2 — FNMI – Inclusive Education – FNMI Differential

This funding supports inclusive education to ensure **school jurisdictions** have the flexibility to support the unique needs of every **funded child/student**. One of the modifiers used within the inclusive education formula relates directly to First Nation, Métis and Inuit children/students attending **school jurisdictions**.

ALLOCATION FORMULA

Differential rates within inclusive education are calculated based on census based modifiers. Funding is then scaled so that allocations gradually increase from zero once a **school board's** modifier reaches the provincial average.

FNMI Inclusive Education Differential	=	Funded FNMI children/students as a percentage of all **funded children/students** in a **school board**	-	Funded FNMI children/students as a percentage of all **funded children/students** in Alberta

When the FNMI Inclusive Education Differential exceeds zero, the modifier is triggered to allow for progressively increased funding under this section depending on the value of the differential.

ALLOCATION CRITERIA

Once a **school board** has more FNMI students as a percentage of their total students as compared to the provincial average for FNMI students to total students, the FNMI modifier will trigger progressively increased funding dependent on how high their FNMI ratio is relative to the provincial average.

Section 4.3 — FNMI – Regional Collaborative Service Delivery Funding

REVISED Regional Collaborative Service Delivery (RCSD) is an approach to enable collaboration at local and regional levels between Alberta Health Services, Alberta Children's Services, Alberta Community and Social Services, **School Authorities**, interested First Nations and community partners to better meet the needs of children, youth and their families. There are 17 RCSD regions across the province; each of the regional partners work collaboratively and share available resources to address regionally identified needs, coordinate and leverage systems, build system capacity, and plan for sustainability. RCSD supports children or students who are registered with an Alberta **school authority** in the Early Childhood Services (ECS) to Grade 12 system; children and youth who are registered with **First Nations schools**; children and youth between birth and age 20 who have been identified as having a low-incidence disability or who have complex needs; and also includes cross-sector training or skill development for school staff, families and service providers who are collaboratively supporting children and youth.

ALLOCATION CRITERIA

1. Funding is provided to RCSD regions for **funded children/students** in **school authorities, First Nations children/students who reside on a reserve** and either attend a funded provincial **school** under an **education services agreement** (code 330), or attend a First Nation School on reserve.

2. The RCSD funding formula is a combination of a per student allocation, per student differential modifiers allocation to reflect regional needs and an allocation of regional management. Two components in the formula support First Nations related RCSD.

RCSD Funding	=	Per Student Allocation	+	Differential Modifiers Allocation	+	First Nations Differential Modifiers Allocation (a)	+	Regional Management Allocation	+	Other Provincial Allocation (b)

a. FIRST NATIONS DIFFERENTIAL MODIFIERS ALLOCATION

i. Funding is provided to RCSD regions for all **First Nations students who reside on a reserve** (code 330) and attend a funded provincial **school** under an **education services agreement**.

ii. Funding is provided on a per student basis using the provincial average per student funding provided under the differential modifiers allocation of the inclusive education grant (see Section 1.10 – Inclusive Education Funding).

b. OTHER PROVINCIAL ALLOCATION

i. Funding provided to RCSD regions for targeted initiatives identified for a specific year.

ii. This targeted funding is provided to support continued engagement, planning and implementation of the RCSD approach with First Nations Communities in support of **First Nations children/students** (and their families) who reside on reserve and/or attend a First Nations **school** in the respective region.

REVISED

REVISED

3. RCSD funding is administered by Alberta Education in partnership with Alberta Children's Services, Alberta Community and Social Services and Alberta Health.
4. RCSD funding must be pooled and shared by the RCSD Regional Partners to support the identified needs of children and youth in the region. All children and youth must have equitable access to services regardless of their school programs.
5. Decisions on how RCSD funding is utilized must be made jointly by the regional partners.
6. Alberta Education distributes RCSD funding through designated banker boards (see Section 6.1)

Note: see Part 6, Section 6.1 for further details on RCSD funding
see Part 10, Section 10.1 – Reporting Requirements and Information – Regional Collaborative Service Delivery

Section 4.4 — Building Collaboration and Capacity in Education

The purpose of the Building Collaboration and Capacity in Education (BCCE) Grant Program is to increase opportunities for First Nations students to receive culturally responsive and meaningful education programs and services through enhanced collaboration and coordination among education stakeholders.*

This one-time targeted funding opportunity supports three-year projects that focus on building capacity for collaborative planning and building capacity for First Nations and First Nations organizations (e.g. Tribal Councils) to participate in provincial initiatives.

Public, separate, and charter **school authorities** who have existing **Education services agreements** for First Nations students residing in a First Nations community and attending a provincial **school** are eligible to apply for funding under the BCCE grant program to support capacity for collaborative planning.

ALLOCATION CRITERIA

REVISED Allocations are based on the number of First Nations students attending provincial schools through existing **Education services agreements** (or tuition agreements) at a per student allocation of $335. The funding allocated to a **school authority** is calculated using the enrolment taken from the previous school year.

REVISED The final intake for the three-year program was on September 15, 2017. No new proposals will be accepted. All BCCE grant program funding must be expended on approved BCCE projects by June 30, 2019.

REPORTING

Annual reporting on all BCCE projects will be required for submission to the First Nations, Métis and Inuit Education Directorate by June 30, 2018. Final reporting will be required for submission by August 15, 2019. Reporting will be based on approved BCCE project, and a reporting template will be provided in advance of the submission deadline.

Please refer to BCCE Program Guidelines for additional details on required reporting.

*The grant program will be reviewed annually throughout the course of three-years to ensure it is meeting stated purpose and objectives.

NEW

Section 4.5 — Innovation in First Nations Education

Continuation of the Building Collaboration and Capacity in Education (BCCE) grant program will occur through a second phase called Innovation in First Nations Education.

The Innovation in First Nations Education (IFNE) Grant Program is designed to increase opportunities for First Nations students to receive coordinated education supports and services that are responsive to their needs by building collaboration, coordination and capacity throughout the provincial and First Nations education systems. The IFNE Grant Program is one of the ways Alberta is providing targeted and strategic funding opportunities to support improved educational outcomes of First Nations students in Alberta. This targeted funding opportunity supports three-year projects for eligible First Nations, First Nations Education Authorities, Tribal Councils and provincial school authorities with existing Education Services (or Tuition) Agreements.

The IFNE Grant Program is intended to enhance, not to replace, Federal funding and programming support for First Nations Education.

ALLOCATION CRITERIA

Eligible provincial **school jurisdictions** can apply under the grant program either on their own or as part of a joint application with one or more eligible partners as defined in the IFNE Grant Program Guidelines. Provincial **school jurisdictions** applying for grant funding require a letter of support from each First Nation with children/students attending their **schools** under an **Education Services** (or Tuition) **Agreement** in order to receive funding to support these students.

Allocations are based on the number of First Nations children/students attending provincial **schools** through existing **Education Services** (or Tuition) **Agreements** at a per child/student allocation of $562. The funding allocated to a **school jurisdiction** is calculated using the enrolment taken from the previous school year. As part of the application process, **school jurisdictions** that have not already been approved for IFNE funding, are eligible to submit a detailed proposal using the IFNE Proposal Template by September 15, 2018 in order to access funding for the remaining years of the program.

- Example:
  - Enrolment for September 2017: 300 children/students
  - 300 x $562 = $168,600

All IFNE grant program funding must be expended on approved IFNE projects by August 31, 2021. Additionally, the IFNE program is exempt from provincial tuition funding, and is not intended to offset provincial tuition or high cost special education for agreements with First Nations or Tribal Councils.

PROPOSALS

Proposals submitted will be assessed against the following criteria identified in the IFNE Grant Program Guidelines (available on Alberta Education website):

1. Alignment:
    a. Do the proposed activities align with and support the purpose of the IFNE Grant Program?
        i. Proposals should demonstrate how activities focus on the selected priority areas.
    b. The proposal should demonstrate/describe how supports will lead to closing the systemic education gap for First Nations students.
    c. Funding may be used to enhance existing programs or initiatives; however, proposals should clearly demonstrate that planned activities would not be duplicative.

2. Activities/Timelines:
    a. Do the planned activities clearly demonstrate collaboration and/or capacity building and a primary focus on developing student supports, especially supports for at-risk students as well as their parents and caregivers.
    b. Are the planned activities achievable within the timeframe specified?

3. Measurable:
    a. Are the planned/proposed activities measurable?

4. Budget:
    a. The budget should contain a three-year timeline that includes: (1) anticipated revenues, (2) expenses and (3) the clear linkage of expense category to the planned activities and outcomes.
    b. Does the proposal demonstrate other contributions (in-kind or other) that will support the project?

5. Implementation:
    a. Does the proposal clearly demonstrate how the initiative/project will be managed, including project governance, human resources and monitoring/reporting?

Although not exhaustive, a list of eligible and ineligible expenditures can be found in the IFNE Program Guidelines. Should you have an inquiry about eligibility of a proposed expense, please contact the First Nations, Métis and Inuit Directorate via the contact information provided below.

First Nations, Métis and Inuit Education Directorate
10044-108 St (9th Floor), 44 Capital Blvd
Edmonton, AB T5J 5E6
Or by e-mail to: EDC.FNEI@gov.ab.ca
Contact the Education Initiatives Branch at (780) 644-8415 (for toll-free access within Alberta, first dial 310-0000)

REPORTING

Annual reporting on all IFNE projects will be required for submission to the First Nations, Métis and Inuit Education Directorate by September 30, 2019. Reporting will be based on approved IFNE projects, and a reporting template will be provided in advance of the submission deadline.

Please refer to IFNE Grant Program Guidelines for additional detail on required reporting.

Section 4.6 — First Nation Framework Agreement Enhancement Funding

The First Nation Framework Agreement Enhancement Funding is to support **First Nation Education Authorities** whose member First Nations have signed a **Framework Agreement** with the Government of Alberta for the establishment of a **First Nation Education Authority**. The purpose of this funding is to support participating First Nations in their strengthening of education on-reserve in Alberta and to address the systemic achievement gap through capacity building and supporting local priorities such as language and culture revitalization, teacher professional development and parental and community engagement. This funding is meant to enhance, but not replace, federal education funding.

This funding is targeted for **First Nations children/students** who reside on-reserve and attend a **First Nation School** and is calculated on a per **child/student** basis to enhance existing funding received from other sources.

ALLOCATION FORMULA

First Nation Education Authority Enhancement Funding	=	# of **children/students** participating under a **First Nation Framework Agreement**	**X**	Per Child/Student Rate

ALLOCATION CRITERIA

1. Allocations are based on the number of **First Nations children/students** attending **on-reserve First Nations schools** operated by a **First Nation Education Authority** (operating multiple schools in multiple First Nations), at a rate of $2,000 per **child/student**.
2. Funding allocated to a **First Nation Education Authority** is calculated using the enrolment taken from the Provincial Approach to Student Information (PASI) system for the previous school year.
3. All per student enhancement Funding must be expended based on a submitted and approved three-year **Enhancement Allocation Plan**, and an **annual work plan** due November 30 within the school year for which it is received.

REPORTING

First Nation Education Authorities will provide annual reporting and updates to students, parents and the communities, which will also be shared with Alberta Education. Annual reporting on the following items will be required for submission to Alberta Education by November 30, following the school year for which funding was received:

- Annual results compared to baseline and target data for the locally developed and select Accountability Pillar performance measures.
- Financial Reporting (Audited Financial Statements and corresponding notes and schedules to the financial statements) signed by an authorized financial representative of the **First Nation Education Authority** or expenditure statements in a format agreed upon with Alberta Education.
- Narrative report detailing progress on activities based on the approved three-year enhancement allocation plan and annual work plan.

REFERENCES

Currently being developed

NEW

Section 4.7 —First Nations Education Services Agreements

Work is currently under way to develop standards for First Nations Education Services Agreements (ESA).

Part 5 – Federal French Funding

Section 5.1 — Federal Francophone Education Funding (Francophone Regional Authorities)

ALLOCATION FORMULA

# **FTE** Francophone **funded children/students**	**X**	Funding Rate

ALLOCATION CRITERIA

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

   FTE Francophone child/student is one who has access to French instruction for a minimum of:
   a. ECS to Grade 6: 712 hours/year;
   b. Grade 7 to 9: 570 hours/year;
   c. Grade 10 to 12: 600 hours/year.
5. For children/students with access to less French instruction time than indicated in criteria #4, the following formula must be used:
   a. ECS to Grade 9

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

   b. Grades 10 to 12

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

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

PROGRAM	GRANT CODE	ESTIMATED RATE
Francophone Education ECS to Grade 6	221	To be determined
Francophone Education Grade 7 to 12	221	To be determined

Section 5.2 — Federal French Language Funding (School Authorities)

ALLOCATION CRITERIA

1. 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 grade12 in the following categories:

   a. **Alternative French Language Programs** (French programs offered under Section 11(1) and 21(1)(a) of the *School Act*, including French Immersion); and

   b. **French as a Second Language (FSL)** courses (French programs offered under Section 11 and 39 of the *School Act*).

2. An individual who is a **First Nations student with status who resides on a reserve** is not eligible to be counted for funding under this section.

3. To be counted as a **FTE funded child/student**, the minimum instructional hours to be provided for in French must be:

   a. ECS – Grade 6: 712 hours/year;
   b. Grades 7 – 9: 570 hours/year;
   c. Grades 10 – 12: 600 hours/year.

4. The minimum instructional hours in French for **alternative French language programs** are:

   a. ECS: 238 hours/year;
   b. Grades 1-6: 475 hours/year;
   c. Grades 7-9: 380 hours/year; and
   d. Grades 10-12: 250 hours/year.

5. a. Grants code 211 must be used for students having access to the minimum instructional hours in French as outlined in #4; and

   b. Grants code 230 must be used for students having access to less than the minimum instructional hours in French as outlined in #4.

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

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

*These estimated rates also apply to **funded children/students** taking courses in an **alternative French language program** who receive less than the minimum number of instructional hours in French per year as outlined in criteria #4.

7. For children/students with less French instructional hours than identified in criteria #3, but at least the minimum hours identified in #4 use applicable rate and formula in criteria #8 for **alternative French language programs**.

8. a. ECS to Grade 9

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

b. Grades 10 to 12

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

9. a. For children/students from ECS to Grade 9, with access to less French Instruction than identified in criteria #4 use the applicable FSL rate and formula in criteria #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 criteria #8b.

10. A **school authority** offering an alternative French language **program** may, by resolution, authorize the commencement of an **alternative French language program** in a **school**; and upon passing the resolution shall inform the **Minister** in writing.

11. A **school authority** must develop, keep current and implement written policies and procedures consistent with provincial policies and procedures for:

    a. **Alternative French Language Programs** (such as French Immersion); and

    b. **FSL courses**.

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Part 6 – Targeted Funding for Provincial Initiatives

Section 6.1 — Regional Collaborative Service Delivery Funding (School Authorities)

Regional Collaborative Service Delivery (RCSD) is an approach to enable collaboration at local and regional levels among Alberta Health Services, Alberta Children's Services, Alberta Community and Social Services, **School Authorities**, interested First Nations and community partners to better meet the needs of children, youth and their families. There are 17 RCSD regions across the province; each of the regional partners work collaboratively and share available resources to address regionally identified needs, coordinate and leverage systems, build system capacity, and plan for sustainability. RCSD supports children or students who are registered with an Alberta **school authority** in the Early Childhood Services (ECS) to Grade 12 system; children and youth who are registered with First Nations Schools; children and youth between birth and age 20 who have been identified as having a low-incidence disability or who have complex needs; and also includes a cross-sector training or skill development for school staff, families and service providers who are collaboratively supporting children and youth.

ALLOCATION FORMULA

The RCSD funding formula is a combination of a per student allocation with differential modifiers to reflect regional needs and an allocation of regional management.

RCSD Funding	=	Per Student Allocation	+	Differential Modifiers Allocation	+	First Nations Differential Modifiers Allocation	+	Regional Management Allocation	+	Other Provincial Allocation

1. PER STUDENT ALLOCATION

   a. Funding is provided to RCSD regions for **funded children/students** in **school authorities** as well as **First Nations children/students who reside on a reserve** (code 330) and attend a funded provincial school under an **education services agreement**.

   b. **Funded students** enrolled in **home education, shared responsibility, outreach** or **online programs** are included in this allocation.

   c. Funding is based on the **FTE funded enrolment** taken from the previous year's **frozen funded headcount.**

Eligible Students	**X**	Per Student Rate

2. REGIONAL DIFFERENTIAL MODIFIERS ALLOCATION

   a. This component recognizes differential modifiers that address diversity factors that vary across regions to ensure an equitable distribution of funding. These modifiers are research-based incidence indicators in three areas: socio-economic, diagnostic and geographic.

b. Funding is provided on a per student basis based on the funding allocated under the differential modifiers component of the inclusive education grant (see section 1.10 – Inclusive Education Funding).

c. Each region's per student rate is derived from the average per student funding provided through the differential modifiers allocation of the inclusive education grant for each **school jurisdiction** represented in the region plus the number of students from each **school jurisdiction** in the region.

d. Funding is provided to RCSD regions for all **funded children/students** in **school authorities** including those enrolled in **home education, shared responsibility, outreach** or **online programs**.

Eligible Students	**X**	Regional Differential Modifiers Per Student Rate

3. FIRST NATIONS DIFFERENTIAL MODIFIERS ALLOCATION

a. Funding is provided to RCSD regions for all **First Nations students who reside on a reserve** (code 330) and attend a funded provincial school under an **education services agreement**.

b. Funding is provided on a per student basis using the provincial average per student funding provided under the differential modifiers allocation of the inclusive education grant (see section 1.10 – Inclusive Education Funding).

4. REGIONAL MANAGEMENT ALLOCATION

a. Each region will receive $100,000 to support regional management.

b. Regions may use up to an additional 4.5 per cent of their RCSD funding for administration of their region.

5. OTHER PROVINCIAL ALLOCATION

a. Funding Provided to RCSD regions for targeted initiatives identified for a specific year.

NEW

b. This targeted funding is provided to support continued engagement, planning and implementation of the RCSD approach with First Nations Communities in support of **First Nations children/students** (and their families) who reside on reserve and/or attend a First Nations school in the respective region.

ALLOCATION CRITERIA

REVISED

1. RCSD funding is administered by Alberta Education in partnership with Alberta Children's Services, Alberta Community and Social Services and Alberta Health.

2. RCSD funding must be pooled and shared by the RCSD Regional Partners to support the identified needs of children and youth in the region. Children and youth throughout the region must have equitable access to services regardless of their **school** program.

REVISED

3. Children and youth, who are registered with **school authorities** and First Nations schools in alternative programs such as **home education, shared responsibility, outreach** and **online** and children and youth with complex needs and/or a low incidence disability are eligible for supports and services through RCSD.

4. Decisions on how RCSD funding is to be utilized must be made jointly by the regional partners.

5. Alberta Education distributes RCSD funding through the following designated banker **school boards** to administer the funds on behalf of the partners.

RCSD Region	Designated Banker School Board
Aspen Collaborative Services RCSD	Evergreen Catholic Separate Regional Division No. 2
Bow River RCSD	Foothills School Division No. 38
Calgary and Area RCSD	Palliser Regional Division No. 26
Central Alberta RCSD	Chinook's Edge School Division No. 73
Central East Collaborative RCSD	Golden Hills School Division No. 75
Eastern Edge RCSD	Elk Island Public Schools Regional Division No. 14
Edmonton RCSD	Edmonton Catholic Separate School District No. 7
Leduc and Area RCSD	Black Gold Regional Division No. 18
Northern Lakes RCSD	High Prairie School Division No. 48
Northern Lights RCSD	Fort Vermilion School Division No. 52
Parkland Evergreen and Area RCSD	Parkland School Division No. 70
Peace Collaborative Services RCSD	Grande Prairie School District No. 2357
Réseau RCSD	Greater North Central Francophone Education Region No. 2
Southeast Alberta RCSD	Prairie Rose School Division No. 8
Southwest Alberta RCSD	Palliser Regional Division No. 26
St. Albert and Sturgeon RCSD	Greater St. Albert Roman Catholic Separate School District No. 734
Wood Buffalo RCSD	Fort McMurray Public School District No. 2833

Note: See Part 10, section 10.1 – Additional Information Regional Collaborative Service Delivery
See Part 4, section 4.3 – Regional Collaborative Service Delivery (RCSD) Funding for First Nations, Métis and Inuit

Section 6.2 — Francophone Regional Collaborative Service Delivery Funding (Francophone Regional Authorities)

REVISED

ALLOCATION CRITERIA

1. The allocation of Francophone RCSD Funding is based on the Regional Collaborative Services Delivery formula (section 6.1).
2. Francophone RCSD funding is accessed by Réseau provincial d'adaptation scolaire (Réseau RCSD).
3. Francophone RCSD funding may only be accessed by a **Francophone Regional Authority** that is a member of Réseau RCSD.
4. Francophone RCSD funding is administered by Alberta Education in partnership with Alberta Children's Services, Alberta Community and Social Services and Alberta Health.
5. Francophone RCSD funding must be pooled and shared provincially by the Réseau RCSD partners.
6. Francophone RCSD funding and the services provided are for students identified in section 6.1 and registered in Francophone school programs.

NEW

7. Decisions on how Francophone RCSD funding is to be utilized must be made jointly by the Réseau RCSD partners.
8. Alberta Education distributes Francophone RCSD funding to Réseau RCSD through the designated banker **school board** to administer on behalf of all partners.

Note: see Part 10, section 10.1 – Reporting Requirements and Information – Regional Collaborative Service Delivery

Section 6.3 — SuperNet Service Funding

ALLOCATION CRITERIA

1. **School authorities** will receive SuperNet service funding for each approved site that is connected to and using the SuperNet services as the primary data network obtained through the SuperNet vendor, Axia SuperNet Ltd.

   Examples of approved sites include **schools**, stand-alone outreach centres/**schools**, one **school authority** head office, and one network operation centre.

2. **School authorities** must sign a Letter of Agreement with Axia SuperNet Ltd. for all SuperNet connected sites.

3. **School authorities** must apply for SuperNet service funding by submitting a SuperNet Service Funding Application (Form 18AE5.4) to the Technology Leadership Branch along with a copy of each Letter of Agreement, Schedule B and Attachment to Schedule B soon after the sites are connected to SuperNet services.

4. **School authorities** must provide notification to the Technology Leadership Branch of any possible changes, including additions and/or deletions to the list of connected sites. Notification timelines are as follows:

   a. one year for additions and moves;

   b. within one month of site closure for a site disconnection.

   If a **school authority** fails to notify the Technology Leadership Branch of a disconnection, the **school authority** will be responsible for the SuperNet costs incurred for the disconnected SuperNet site.

5. SuperNet service funding is provided on the basis of approved connected sites and the monthly service cost. The funding amount is determined by multiplying the number of eligible connected sites by the monthly SuperNet rate.

6. SuperNet Service funding is paid retroactively to the service activation date if the funding application is received by March 31 of the current **school year**. Funding applications received after March 31 are not eligible for retroactive funding.

7. SuperNet Service funding is calculated on a monthly basis and provided for each approved site as follows:

   a. **school jurisdiction**s and **Francophone Regional Authorities** 100 per cent;

   b. level 1 **accredited funded private schools** 60 per cent;

   c. level 2 **accredited funded private schools** 70 per cent;

   d. **private ECS operators** 50 per cent (payment for connection after the 1st of the month will be pro-rated).

   Note: SuperNet service for First Nations schools is funded by Indigenous Services Canada

8. NETWORK HEAD-END PROVISION

   Alberta Education will provide SuperNet service funding to a **school authority** network head-end location based on the following formula:

   Head End SuperNet Service Funding Ratio = authority student population/average number of students per **school jurisdiction** (based on provincial student population counts at the end of each **school year**).

   If the ratio is less than 1.4 then the **school jurisdiction** will receive 100 per cent of the funding rate. Authorities with a calculated Head-End Super Net Funding Ratio of 1.5 or greater will receive the ratio rounded to the next whole number multiplied by the funding rate.

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 Technology Leadership Branch that is valid for one year. They must continue to provide a new, signed document for each subsequent year; and

   c. the total amount of monthly SuperNet service funding 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** that own and operate their own fibre-optic high-speed network connections between eligible SuperNet connectable sites can claim SuperNet service funding for these sites without an Axia SuperNet Ltd. contract for those sites given the following procedures and considerations:

    a. at least one site on the **school authority** owned network infrastructure must connect to SuperNet using an Axia SuperNet Ltd. contracted service;

    b. the total amount of monthly SuperNet service funding 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.; and

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

Section 6.4 – Class Size Funding (School Jurisdictions)

1. Class size funding is a component of base instruction funding for ECS, Grades 1 to 3 and Tiers 2 and 3 of CEU funding. (See section 9.1 **School Jurisdiction** Funding Rates).

   Note: although class size funding is allocated based on a specific grade level or for specific CTS courses, **school jurisdictions** have the flexibility to use this funding to hire or retain teachers at any grade level based on local needs.

2. **School jurisdictions** will continue to use the online reporting tool to consolidate their class size data and are required to post their jurisdiction and **school** class size averages on their website by January 15 of each **school year**.

3. **Hutterite Colony schools** are not eligible for class size funding.

Section 6.5 – School Nutrition Program

REVISED The purpose of this funding is to provide students in select **schools** across Alberta with a daily nutritious meal that adheres to the *Alberta Nutrition Guidelines for Children and Youth*. Funds are targeted for the provision of nutritional meals including costs associated with ordering, preparation and delivery. Funds are not available for the development of infrastructure, such as commercial kitchens or other food handling facilities. All Alberta Education School Nutrition Program funding must be expended on school nutrition program(s) only.

REVISED

ALLOCATION CRITERIA

Participating **school jurisdictions** are required to:

1. Identify the participating **school(s)**;
2. Submit a detailed proposal to the Alberta Education School Nutrition Program outlining how the program will be introduced and/or how the **school jurisdiction** plans to enhance or expand an existing program(s);
3. Demonstrate how the program adheres to the Alberta Nutrition Guidelines for Children and Youth; and
4. Submit a proposed budget plan signed by the Secretary Treasurer.

When the proposal documents have been submitted, including the signed proposed budget, and are determined to be acceptable, **school boards** will receive 80% of their total eligible funding. The final payment (or deduction), up to the eligible amount, will be adjusted for any additional unexpected surplus (that is in excess of the surplus amount approved in the budget) from prior year approved budget to actual expenditure that is reported on the applicable schedule in the year-end financial statements of the **school jurisdiction** for the previous school year.

NEW Charter schools are not eligible for funding under this program.

REPORTING

School Jurisdictions are required to submit:

- An interim Mid-Year Summary, including operational program summary and updated financial schedule by January 31; and
- An Annual Report on the School Nutrition Program that includes operational program reporting and the finalized financial schedule for the previous school year by August 31.

Reporting should be submitted to Alberta Education School Nutrition Program.

Alberta Education will not fund any deficits.

The following references, developed by Alberta Health Services, are available when developing plans:

School Nutrition Handbook

Steps to Creating a School Nutrition Policy

Section 6.6 — School Fees

Through the proclamation of *An Act to Reduce School Fees*, amendments to the *School Act* stipulates the "public education system should be accessible to all **students**, and fees should not present a barrier to achieving core learning outcomes."

The proclamation of *An Act to Reduce School Fees* regarding school fees impacts **school jurisdictions** and removes their statutory authority to charge a fee for instructional supplies or materials (formerly S.60(2)(j) of the *School Act*).

An Act to Reduce School Fees does not apply to **private schools**.

ALLOCATION FORMULA

1. To support *An Act to Reduce School Fees*, during its initial year of implementation, funding was provided to **school jurisdictions** for the 2017/18 school year based on fee revenue reported by **boards** in their 2015/2016 audited financial statements.

REVISED

2. Each **board** will be funded to the amount reported in the Fee Revenue Schedule under the Basic Instruction Fee category of their 2015/2016 audited financial statements.
3. This is a targeted funding allocation and may only be used to eliminate fees previously charged for instructional supplies or materials to be defined per new School Fee Regulation.
4. A new School Fee Regulation was developed in the spring of 2017 in support of *An Act to Reduce School Fees* *School Fees and Costs Regulation*.
5. Additional requirements from **school boards** with respect to this targeted allocation may be added to this section when the regulation is finalized.

Section 6.7 — School Transportation Fees

Through the proclamation of *An Act to Reduce School Fees*, Amendments to the *School Act* stipulate the "public education system should be accessible to all students, and fees should not present a barrier to achieving core learning outcomes."

The proclamation of *An Act to Reduce School Fees* regarding school transportation fees impacts **school jurisdictions** by specifying that "students who are entitled to transportation to their school in accordance with this Act should not be charged for this service."

An Act to Reduce School Fees does not apply to **private schools**.

Transportation fees shall not be charged to a **resident child/student** attending their **designated school** for regular programming who is transported under section 51 of the *School Act* and the *School Transportation Regulation* or required to be transported to and from **school** under section 51 of the *School Act* and the *School Transportation Regulation* and is enrolled in a **school** of the **board**. This includes **resident children/students with disabilities** riding on a bus designated only for the transportation of those **children/students with disabilities** who cannot, because of the severity of their disability/delay, use regular transportation services.

ALLOCATION FORMULA

1. To support *An Act to Reduce School Fees* during its initial year of implementation, funding was provided for the 2017/18 school year to **school jurisdictions** that charged transportation fees that are no longer permissible under *An Act to Reduce School Fees*.
2. This funding will be based on a portion of the transportation fee revenue reported by **school jurisdictions** in the 2015/2016 financial statements.
3. This is a targeted funding allocation and may only be used to eliminate transportation fees that are no longer permissible under *An Act to Reduce School Fees*.
4. A new School Fee and Cost Regulation and a revised *School Transportation Regulation* have been developed in the spring of 2017 in support of *An Act to Reduce School Fees*.
5. Additional requirements from **school boards** with respect to this targeted allocation may be added to this section when the regulation is finalized.

Section 6.8 — Dual Credit Programming

As part of Alberta Education's commitment to support dual credit maintenance and growth across the province, an increased level of funding will be available to **school authorities** for **dual enrolled dual credit** programming (where a school authority has a formal partnership agreement with an eligible post-secondary institution). The ministry recognizes that additional funding for this type of dual credit programming is needed (e.g., establishing partnerships, ensuring adequate staff are available to oversee the dual credit opportunity, facility costs, and equipment costs).

There are two components to funding for dual credit programming:

1. Update Tier rate funding per CEU – available to all **school authorities** for authorized **dual enrolled dual credit** courses.
2. Start-up Funding – available to **public school authorities** and First Nations/**First Nations Education Authorities** only.

ALLOCATION FORMULA

# of **dual enrolled dual credit** CEUs for **funded students** in Grades 10 – 12	X	(	applicable Tier 5 CEU rate dependent on the type of **school authority***	)

*Note: See part 9 section 9.1 and 9.3 for applicable funding rates.

ALLOCATION CRITERIA

Tier Rate Funding per CEU

1. **School authorities** submit completed courses that have been authorized as **dual enrolled dual credit** courses in the Provincial Approach to Student Information (PASI) system by selecting the dual enrolment flag (DEF) in PASIprep.
2. When the dual enrolment flag is selected for an authorized **dual enrolled dual credit**, the Tier 5 rate will be applied regardless of the original funding tier for the course.
3. Selecting the **dual enrolment** flag will require the school to choose the post-secondary institution that they are in partnership with from the drop-down menu within PASIprep.
4. Funding for **dual enrolled dual credit** courses will be provided after each term.
5. **School authorities** with **schools** on High School Redesign or who are block funded along with First Nations/**First Nations Education Authorities** that offer authorized **dual credit** programming will be funded at a top up rate of $59.15 per CEU for **dual enrolled dual credit** courses. The top-up amount was determined by taking the difference between the Tier 5 rate ($250) and the Tier 1 rate ($190.85). This top up funding will be accessed through the same process of submitting course information through PASIprep as identified in the prior bullet points.

Start-up Funding

As part of Alberta Education's commitment to support **dual credit** growth across the province between 2017 and 2021, $8 million in targeted start-up funding ($2 million per year) is available for eligible **school authorities** to apply for new **dual credit** opportunities.

The goal of the start-up funding is two-fold:

1. To encourage **school authorities** that have not participated in dual credit previously to engage in dual credit to develop new opportunities; and
2. To encourage **school authorities** that have been involved in dual credit to develop additional dual credit opportunities.

Start-up funding is available to public, separate, and Francophone **school authorities** as well as First Nations**/First Nation Education Authorities**. Start-up funding is not available to **charter schools** and **accredited funded private schools**.

1. Each eligible **school authority** will be able to apply for one new start-up funding grant each school year beginning in the 2017/18 school year through to the 2020/2021 school year for funding to be allocated in the following school year.
2. Start-up funding grants will not exceed $50,000 per **school authority** annually.
3. Approximately 40 **school authorities** will receive start-up funding each year between 2018 and 2021.
4. Start-up funding is suitable for both single enrolled or **dual enrolled dual credit** opportunities.
5. Start-up funding for the second intake can be accessed through an online application process via the Alberta Dual Credit website beginning May 1, 2018, and will remain open until October 30, 2018, 5:00 p.m. **School authorities** that are approved for start-up funding will be notified in December 2018 and will receive the funding in September 2019.

Section 6.9 — Classroom Improvement Fund (CIF) (School Jurisdictions)

The Classroom Improvement Fund (CIF) Grant Program is intended to improve the student experience in the classroom. For the 2018/19 school year, **school boards** are strongly encouraged to prioritize retaining staff hired with the 2017/18 CIF funding and focus on improving experiences for students with complex or special needs and/or English Language Learners.

ALLOCATION FORMULA

- Total CIF grant budget is $77 million
- Each board receives a $100,000 base line allocation

REVISED

- Each board receives a proportionate share using a process similar to the first round of CIF funding. However, minor adjustments have been made to ensure **school jurisdictions** do not receive less funding than they did in the prior year and some jurisdictions will receive supplemental funding due to enrolment growth.

ALLOCATION CRITERIA

- Each **school jurisdiction** will submit proposals, on the updated proposal form, to Alberta Education's System Excellence Division. These proposals will be reviewed for compliance with the parameters of funding and upon a determination that the proposal fulfils the conditions of funding, the CIF grant funding will be provided to the **school jurisdiction**.
- **School jurisdictions** are strongly encouraged to collaborate with their teachers to develop CIF grant proposals through the establishment of a committee with teacher representatives to decide on allocation of grant funding.
- Alberta Education will not accept proposals submitted later than September 30, 2018.
- No payment of CIF grant funding will be made prior to September 1, 2018 or after August 31, 2019. Funds provided through the CIF program may be spent up to August 31, 2019. The **school jurisdiction** shall repay any unused portion of the CIF grant funds received.
- This grant program will cease as of August 31, 2019 and Government makes no commitment to continue it in any school year after 2018/19.
- **School jurisdictions** will be required to provide Alberta Education with a final report of CIF resource utilization, in accordance with section 8 of the CIF proposal template.

- The CIF may be used for the following types of items:
  a) maintaining teaching and non-teaching staff hired with CIF funding during the 2017/18 school year
  b) hiring of additional teaching and non-teaching staff
  c) initiatives that enhance supports for student with complex learning needs and/or English language learners.
- With the exception of maintaining staff hired with CIF funding in 2017/18, hiring additional staff or increasing the full time equivalency (FTE) of existing staff, the CIF cannot be used for any other form of compensation (salary or allowances) or benefits to current employees.
- The CIF grant funding cannot be used for capital expenditures; for any administrative costs; or for any costs related to the operation of the CIF grant program.

REFERENCES

A copy of the Classroom Improvement Fund Grant Proposal 2018/19 template can be requested from Matt Beattie, Manager, Compensation and Data Analytics, if you do not already have it.

Part 7 – Other Provincial Support Funding

Section 7.1 — Education Program in an Institution (EPI)

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 an **institution**.
3. Institutional Funding will only be provided for eligible **resident students of the government** and **day students** who:
   a. are in the custody under the Corrections Act, the Corrections and Conditional Release Act (Canada), the Youth Criminal Justice Act (Canada) or the Youth Justice Act, and deemed by the **school jurisdiction** and Alberta Solicitor General staff to be unlikely to succeed in any other **school jurisdiction** education programs; or
   b. are in the custody of a regional Child and Family Services Authority (CFSA) director, or a Designated First Nations Agency (DFNA) Chief Executive Officer or have a guardian appointed under the Child, Youth and Family Enhancement Act and reside in a **group home** or treatment centre and receive intensive treatment; or
   c. require long term intensive medical care which can only be provided onsite at the hospital; or
   d. are a temporary resident of a women's shelter and require protection from physical, psychological or sexual abuse.
4. **Institutional students with a severe disability** in an educational program provided by an **accredited funded private school** who have been placed in an **institution** by Alberta Health Services, the Alberta Solicitor General or the regional CFSA will be funded through Institutional Funding and are not eligible for Severe Disabilities Funding.
5. EPIs will be funded for a 10 month educational program unless their contract stipulates otherwise. Usually secure EPIs (such as Young Offender Centres) will be funded for a 12-month education program. A secure facility is one where the student is detained in a locked-down facility (i.e. guarded and confined).
6. **School authorities** with a contract or approval to provide an EPI are required to:
   a. ensure all eligible **institutional students** are registered with the grants code 550;
   b. submit a budget of costs and revenues using Form 18AE7.1 to the Learner Services Branch by April 28 for the following **school year**. EPIs are expected to stay within their approved budget;
   c. submit a letter for approval to the Learner Services Branch explaining the need for additional funds when requesting a significant change to a proposed or approved budget;
   d. submit an application for actual program costs and revenues using Form 18AE7.1 to the School Finance Branch by October 15 of the following **school year**;
   e. ensure actual costs reflect significant increases or decreases in student enrolment;
   f. keep daily attendance records for all students; and

g. ensure 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 the Learner Services Branch. Documentation must be submitted by December 1 preceding the **school year** for which approval is being requested.

8. To maintain the confidentiality of students in Women's Shelter programs, **school authorities** are not required to submit a list of names or ASNs on the final claim; however, they should report any base funding for these students and report this revenue on budget and final cost forms.

Note: See also Part 10, Section 10.1 – Reporting Requirements and Information in this manual.

Section 7.2 — Regional Consortium Funding, Management and Infrastructure

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. It is recognized that the consortia receive funds from **school authorities** and education partners to support a variety of regional and local needs. From the ministry, the consortia are supported through funds to help support management and infrastructure, and may also receive funds to provide supports for various programs and initiatives through contracts and grants.

4. The consortia will determine the scope of their work in consultation with the ministry, the consortia agent **boards**, and **school authorities** to ensure relevant, effective and efficient services and management of human and financial resources within each fiscal year.

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 the following documents: a Statement of Revenues and Expenses, a Statement of Financial Position, Schedule 1 – Conditional Grant Program Costs and Net Grants Revenue, Schedule 2 – Conditional Grant Transfers to Other Consortia, Schedule 3 – Conditional Grant Program Deferred Revenue, Schedule 4 – Cost Recovery Programs – Revenue and Costs, and the Certification page.

5. The consortia shall submit their statements to the School Finance Branch by December 31.

CONSORTIA NAMES	AGENT BOARD
Calgary Regional Consortium	Canadian Rockies Regional Division No. 12
Central Alberta Regional Consortium	Red Deer Public School District No. 104
Consortium Provincial Francophone	The Southern Francophone Education Region No. 4
Edmonton Regional Learning Consortium	Elk Island Catholic Separate Regional Division No. 41
Learning Network	Lakeland Roman Catholic Separate School District No. 150
Northwest Regional Learning Consortium	Grande Prairie School District No. 2357
Southern Alberta Regional Professional Development Consortium	Lethbridge School District No. 51

Section 7.3 — Regional Consortium Funding, Curriculum Implementation Support

The following section describes the funding provided to the Alberta Regional Professional Development Consortia related to provision of supports for the implementation of provincial curriculum in Alberta. This section further outlines the associated planning and reporting cycle.

ALLOCATION FORMULA

1. Funding will be provided to the seven established Alberta Regional Professional Development Consortia approved by the **Minister**, for the provision of professional learning to support provincial curriculum implementation that aligns with provincial priorities in a manner that best serves the needs of **school authorities**.
2. Each consortium shall provide these professional learning supports at no cost to teachers.
3. Professional learning within the context of curriculum implementation includes, but is not limited to, supporting current curriculum, provincial assessments, and supporting curriculum development within the ministry's priority of curriculum renewal.
4. Funding will be provided to a consortium's agent **board** as a base amount plus a percentage of the remaining funds provided for this purpose.
5. The percentage of the remaining funds allocated to each agent **board** is determined through the consideration of factors that include the number of teachers, students, **schools** and **school authorities** in each region, as well as factors related to distance and sparsity.

ALLOCATION CRITERIA

Beginning the Cycle – Priority Setting

1. Annually, in the spring of each calendar year, priorities for provincial curriculum implementation support will be identified by Curriculum Division (CD), Alberta Education and given to the consortia.

Proposal and Plan

2. Each consortium shall propose to Alberta Education the professional learning supports most appropriate for supporting provincial priorities in their region, as determined through collaboration with their regional partners and CD. These will include a wide variety of research-informed approaches and opportunities for teachers, other educational leaders, and other education staff, that build capacity within **schools** and **school authorities**, regionally and provincially.
3. Each consortium shall submit its plan to the Quality Assurance & Strategic Supports (QASS) Branch consisting of:
   a. a proposed budget showing how the funds for curriculum implementation support will be assigned to each provincial priority and what percentage this is of their overall budget;
   b. a plan that includes the intended strategies or activities, anticipated outputs and outcomes; and the measures to be used to demonstrate effectiveness; and
   c. the commencement date showing as September 1, of each year of the plan.

Concluding the Cycle - Reporting

4. A mid-year report will be submitted to QASS by January 31, 2019, of the same **school year** and a final report to conclude the cycle, providing program details and results achieved, in draft form, no later than October 31, 2019 followed by a final version of the report and a financial statement by December 31, 2019.
5. QASS monitors consortia's activities related to priorities and ensures accountability through:
   a. ongoing communication with each consortia
   b. attendance at selected meetings of consortia executive directors
   c. monitoring of consortia websites
   d. mid-year review meetings with each consortium
   e. mid-year and final reports submitted by each consortium.

Section 7.4 — 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 or separate **school jurisdiction** or a **Francophone Regional Authority** 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 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:
   a. applies to the unsupported portion of the debenture debt; and
   b. is in excess of debenture interest calculated at the following rates:

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

   Where the debenture borrowing is approved by the LAB on or after March 28, 1983 there will be no interest shielding.
5. Interest shielding through payment for debenture interest on the unsupported portion of the principal is limited to compensation for interest rates up to 12 per cent inclusive.
6. The annual debenture debt, principal and interest, payments for **school buildings** are paid directly by Treasury Board and Finance on behalf of the **school jurisdictions** to ACFA.
7. Interest shielding on unsupported debentures will be paid directly to the **school jurisdiction**.

Section 7.5 — Fort McMurray Allowance

ALLOCATION FORMULA

$1,040 per month	**X**	# of eligible FTE employees

ALLOCATION CRITERIA

1. This living allowance is only provided to the following **school jurisdictions** who have employees that live and work in the vicinity of Fort McMurray:
   a. Fort McMurray Public School District No. 2833;
   b. Fort McMurray Roman Catholic Separate School District No. 32;
   c. Greater North Central Francophone Education Region No. 2 (Centre Communautaire Scolaire Boréal only); and
   d. Northland School Division No. 61 (Fort McKay and Anzac schools only).
2. Eligible **school jurisdictions** must distribute the Fort McMurray allowance funding to the eligible employees only. This funding may not be used for other purposes.
3. Eligible **school jurisdictions** must provide eligible employee FTE information by submitting Form 18AE7.5 to the Director of School Finance by January 31 of the **school year**.
4. Payment of this funding will be based on the previous year employee FTE information until Form 18AE7.5 is received. Payments will then be revised for the current **school year**.
5. 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.

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Part 8 – Capital Funding

Section 8.1 — School Facilities (School Jurisdictions)

NEW

Payment Processing for School Facilities transfers to Alberta Infrastructure effective April 1/18.

ALLOCATION CRITERIA

1. **School jurisdictions** may receive capital funding for projects approved by Alberta Education for new, additions and replacement schools, for modernization of existing school facilities, and for the construction, transportation, re-location and set up of modular classrooms and re-location of portable classrooms.
2. **School jurisdictions** must submit their Three Year Capital Plan by April 1. The Capital Plan should identify projects in order of priority with consideration given to:
   a. new and replacement schools, and additions to school facilities;
   b. modernization and upgrading of existing school facilities.
3. Modular classroom requirements and the relocation of modular or portable classrooms may be requested annually in November as part of the Modular Classroom Program.
4. Funds approved for specific capital projects may only be used for the specific project and may not be used for other projects without prior approval from the **Minister**.
5. **School jurisdictions** must utilize provincially supported school facilities (including P3 or design build capital projects) to provide educational services to Alberta students over the life of the asset. If the use of these assets changes, please refer to the Guidelines for the Audited Financial Statements for the accounting treatment.
6. **School jurisdictions** must follow the *Disposition of Property Regulation (Alberta Regulation 181/2010)* for any supported asset designated as surplus.

REFERENCES

School Capital Manual

Disposition of Property Regulation

Section 8.2 — Infrastructure Maintenance and Renewal (School Jurisdictions)

ALLOCATION FORMULA

1. The Infrastructure Maintenance and Renewal (IMR) Funding formula is based on the following components:
   a. 50 per cent enrolment;
   b. 24 percentage of the building;
   c. 24 per cent eligible school space;
   d. 2 per cent for non-refundable GST and other factors.

2. The enrolment number for IMR is based on the **FTE funded enrolment** taken from the **frozen funded head count** of the previous year. For the purpose of this grant;
   a. a student in an **online program** (code 620) is not included;
   b. an ECS funded **child with severe disabilities** (PUF) is counted at 1.5 FTE.

ALLOCATION CRITERIA

1. IMR funding may only be used for the purpose for which it is intended.
2. **School jurisdictions** may use the funding to:
   a. ensure school facilities meet all regulatory requirements, particularly as they pertain to providing a safe and healthy learning environment.
   b. preserve and improve the quality of the learning environment by:
      i. replacing building components that have failed;
      ii. prolonging the life of the school facility through planned, proactive replacement of major components;
      iii. upgrading of the educational areas to meet program requirements.
   c. meet the requirements of children/students requiring specialized supports and services.
   d. replace or upgrade building components to improve energy conservation and efficiency to achieve cost savings as a result.
3. For the 2018/19 school year, a minimum of 30 per cent of a **school jurisdiction's** IMR allocation must be capitalized and applied to projects that meet capitalization eligibility requirements.
4. Alberta Education will release IMR funding upon approval of a **school jurisdiction's** Capitalized IMR Expenditure plan. The due date for the Capitalized IMR Expenditure plan will be communicated outside of the Funding Manual for School Authorities.
5. **School jurisdictions** will be advised of their allocation amount by email from the School Finance Branch. The IMR Grant Calculation Sheets are available on the Extranet under School Finance.
6. The IMR funding allocation is not provided for privately owned buildings.

REFERENCES

School Capital Manual

Part 9 – Payments to School Authorities

FUNDING RATES

Section 9.1 – School Jurisdiction Funding Rates

School Jurisdiction Funding Rates	2017/18	2018/19
For the 2018/19 **school year**, funding rates remain the same as for the 2017/18 **school year**.		
Base Instruction Funding		
ECS (per **funded child**)		
ECS Base Instruction Rate	$3,339.90	$3,339.90
ECS Class Size Base Rate	$ 760.84	$ 760.84
ECS Basic Child Grant	**$4,100.74**	**$4,100.74**
Grades 1 to 3 (per **funded student**)		
Grades 1 to 3 Base Instruction Rate	$6,679.79	$6,679.79
Grades 1 to 3 Class Size Base Rate	$1,521.68	$1,521.68
Grades 1 to 3 Basic Student Grant	**$8,201.47**	**$8,201.47**
Grades 4 to 6 Base Instruction Rate (per **funded student)**	**$6,679.79**	**$6,679.79**
Grades 7 to 9 Base Instruction Rate (per **funded student)**	**$6,679.79**	**$6,679.79**
Grades 10 to 12 (per **CEU** to a maximum of 45 **CEU**s per year per **funded student**)		
See Section 10.1, **CEU** Funding Tiers list		
Tier 1 **CEU** Rate	**$190.85**	**$190.85**
Tier 2 **CEU** Rate (includes $12.83 per **CEU** Class Size rate)	**$203.68**	**$203.68**
Tier 3 **CEU** Rate (includes $36.18 per **CEU** Class Size rate)	**$227.03**	**$227.03**
Tier 4 **CEU** Rate (Work Experience and Special Projects)	**$114.50**	**$114.50**
Tier 5 **CEU** Rate (**dual enrolled dual credit**)	**$250.00**	**$250.00**
CEU rate top-up funding for authorized **dual enrolled dual credit** CEUs taken by funded students in schools that are block funded, participating in High School Redesign, or are First Nations/First Nation Education Authorities	**$59.15**	**$59.15**
ADLC course **CEU**s funded at 44% of the Tier 1 **CEU** Rate		
High School Base Rate = 35 Tier 1 **CEU**s (special needs, 550 & 640)	**$6,679.79**	**$6,679.79**
ECS Program Unit Funding (PUF)		
Maximum per eligible **funded child**	**$25,051.20**	**$25,051.20**
Maximum for each additional **funded child** in a unit	**$6,215.88**	**$6,215.88**
Education Program in an Institution (see Section 7.1)	**net cost of program for eligible students**	
English as a Second Language (per eligible **FTE funded child/student**)	**$1,178.10**	**$1,178.10**

School Jurisdiction Funding Rates	2017/18	2018/19
Equity of Opportunity Per Student (per **FTE funded enrolment**) Density and Distance	**$101.00 per formula**	**$101.00 per formula**
First Nations, Métis and Inuit Education (per eligible **FTE First Nations, Métis and Inuit funded child/student**)	**$1,178.10**	**$1,178.10**
Fort McMurray Allowance (per eligible FTE employee)	**$1,040.00**	**$1,040.00**
Francisation (per eligible **FTE funded child/student**)	**$1,178.10**	**$1,178.10**
Francophone Equivalency Access (per eligible **funded student**)	**$624.24**	**$624.24**
Francophone Regional Collaborative Service Delivery (see Section 6.2)	**per formula**	
Home Education (per eligible **funded student**) + 50% of the cost of ADLC courses for Gr. 7-12 to a maximum of: + additional funding for Grades 1 - 6 ADLC courses (Section 1.3)	**$1,670.81** **$1,670.81** **per formula**	**$1,670.81** **$1,670.81**
Hutterite Colony Schools (per colony **school**)	**$11,541.30**	**$11,541.30**
Inclusive Education (see Section 1.10) Supports and Services (per **FTE funded enrolment**) Differential Modifiers and Program Equity Additional Per Student (per **FTE funded enrolment**)	**$466.49 per formula $57.22**	**$466.49 per formula $57.22**
NEW **Innovation in First Nation Education** (per eligible First Nations child/student attending a provincial school with an education services agreement)	**N/A**	**$562.00**
Northern Allowance Lower Zone (per **FTE funded enrolment**) Intermediate Zone (per **FTE funded enrolment**) Upper Zone (per **FTE funded enrolment**)	**$471.24 $705.84 $1,060.80**	**$471.24 $705.84 $1,060.80**
Outreach (per approved **Outreach Program**)	**$62,972.76**	**$62,972.76**
Plant Operations & Maintenance (see Section 1.17) Gr. K-6 (per FTE **funded child/student**) per formula Gr. 7-9 (per FTE **funded student**) per formula Gr. 10-12 (per FTE **funded student**) per formula	**$795.30 $751.18 $755.38**	**$795.30 $751.18 $755.38**
Regional Collaborative Service Delivery (see sections 4.3, 6.1 and 6..2)	**per formula**	**per formula**
Regional Consortium (per consortium) Maintenance & Infrastructure	**$191,987**	**$191,987**
Regional Consortium (per consortium) Curriculum Implementation Support	**per formula**	**per formula**
School Fees (see Section 6.6)	**2015/16 related rev from AFS**	**2015/16 related rev from AFS**

School Jurisdiction Funding Rates	2017/18	2018/19
School Nutrition Program (see Section 6.5)	**See Section 6.5**	
School Transportation Fees (see Section 6.7)	**per formula**	**per formula**
Small Board Administration		
Charter School (per **school**) (see Section 1.13)	**per formula**	
School jurisdiction FTE funded enrolment < 2000	**$470,825.88**	**$470,825.88**
School jurisdiction FTE funded enrolment > 2000 but < 3000	**sliding scale reducing to zero**	
Small Schools by Necessity: Base Allocation		
Schools with ≤ 150 **FTE funded enrolment**	**$88,281.00**	**$88,281.00**
Schools with > 150 but < 226 **FTE funded enrolment**	**sliding scale reducing to zero**	

Small Schools by Necessity: Variable Allocation

School Type	Peak Enrolment	Enrolment Limit		
K – 3	40	80	**$588.54**	**$588.54**
K – 6	80	150	**$1,650.36**	**$1,650.36**
K – 9	80	220	**$1,884.96**	**$1,884.96**
K – 12	80	290	**$2,943.72**	**$2,943.72**

Socio-Economic Status (per eligible **FTE funded enrolment** x the applicable incidence rate)					**$471.24**		**$471.24**
SuperNet Services (max. per month per approved site)					**$800.00**		**$800.00**
Transportation Funding:							
1. ***Urban Transportation***							
10,000-29,999 population (per **eligible passenger/eligible transported ECS child**)					**$507**		**$507**
30,000-49,999 population (per **eligible passenger/eligible transported ECS child**)					**$487**		**$487**
50,000 + population (per **eligible passenger/transported child**)					**$466**		**$466**
Distance (km)	2.4 - 6.0	6.01 - 10	10.01 - 14	14.01 - 18	18.01 - 26	26.01 - 38	> 38
Rate per km	$10.58	$15.48	$18.52	$21.30	$26.12	$28.56	$31.45
Parent-provided ECS Transportation (including **children with a disability/delay**)					**$549**		**$549**
ECS Special Transportation (per round trip per **child with a disability/delay** - max. of 185 trips)					**$18.24**		**$18.24**
Special Transportation (per eligible **student with a disability**)					**$3,374**		**$3,374**
Weekend Transportation (per eligible **funded student**)					**$4,743**		**$4,743**
Boarding Transportation (per eligible **funded student**)					**$4,263**		**$4,263**
Inter-school Transportation (per km for two-way **distance** between **schools** for eligible programs)					**$1.09**		**$1.09**

School Jurisdictions Funding Rates	2017/18	2018/19
2. Metro Urban Transportation		
Regular Transportation (per **expected eligible passenger**)	**$549**	**$549**
Parent-provided ECS Transportation (including **children with a disability/delay**)	**$549**	**$549**
ECS Special Transportation (per round trip per **child with a disability/delay** - max. of 185 trips)	**$18.24**	**$18.24**
Special Transportation (per **funded student** based on severe profile)	**$3,374**	**$3,374**
3. Urban Francophone Transportation		
10,000-19,999 population (per **eligible passenger/eligible transported ECS child**)	**$642**	**$642**
20,000-29,999 population (per **eligible passenger/eligible transported ECS child**)	**$595**	**$595**
30,000 + population (per **eligible passenger/eligible transported ECS child**)	**$549**	**$549**
Parent-provided ECS Transportation (including **children with a disability/delay**)	**$549**	**$549**
ECS Special Transportation (per round trip per **child with a disability/delay** - max. of 185 trips)	**$18.24**	**$18.24**
Special Transportation (per eligible **student with a disability**)	**$3,374**	**$3,374**
Weekend Transportation (per eligible **funded student**)	**$4,743**	**$4,743**
Boarding Transportation (per eligible **funded student**)	**$4,263**	**$4,263**
Inter-school Transportation (per km for two-way **distance** between **schools** for eligible programs)	**$1.09**	**$1.09**
4. Rural Transportation		
Regular Transportation (per **eligible passenger/ eligible transported ECS child**) (see Section 1.20)	**Per formula based on grid below**	

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Rural Transportation Rate

Density of Effective Transportation Service Area

Weighted Passengers	0-.29	.30-.35	.36-.57	.58-.76	.77-.95	.96-1.14	1.15-1.30	1.31-1.45	1.46-3.01	3.02+
0-700	$709	$810	$881	$898	$907	$978	$1129	$1309	$1838	$2111
701 – 1400	$709	$782	$870	$887	$894	$967	$1107	$1180	$1475	$1961
1401 – 2100	$709	$773	$864	$881	$890	$907	$1098	$1165	$1426	$1897
2101 – 2800	$709	$733	$852	$868	$885	$904	$1012	$1160	$1269	$1807
2801 – 3500	$709	$729	$836	$855	$870	$897	$947	$1066	$1225	$1438
3501 – 4200	$709	$721	$770	$842	$857	$893	$939	$1040	$1124	$1321
4201 – 4900	$702	$709	$754	$774	$842	$887	$932	$979	$1044	$1210
4901 – 5600	$702	$702	$710	$754	$785	$863	$890	$942	$1004	$1105
5601 – 6300	$702	$702	$702	$721	$765	$796	$878	$911	$968	$1040
6301 +	$702	$702	$702	$702	$721	$776	$799	$891	$929	$990

Distance (km)	2.4 - 6	6.01 - 10	10.01 - 14	14.01 - 18	18.01 - 26	26.01 - 38	> 38
Rate per km	$10.58	$15.48	$18.52	$21.30	$26.12	$28.56	$31.45

School Jurisdictions Funding Rates	2017/18	2018/19
Parent-provided ECS Transportation (including **children with a disability/delay**)	**$549**	**$549**
ECS Special Transportation (per round trip per **child with a disability/delay** - max. of 185 trips)	**$18.24**	**$18.24**
Special Transportation (per eligible **student with a disability**)	**$6,748**	**$6,748**
Weekend Transportation (per eligible **funded student**)	**$4,743**	**$4,743**
Boarding Transportation (per eligible **funded student**)	**$4,263**	**$4,263**
Inter-School Transportation (per km for two-way **distance** between **schools** for eligible programs)	**$1.09**	**$1.09**

Section 9.2 — Private ECS Operators Funding Rates

ECS Funding for Private ECS Operators and Accredited Funded Private Schools with ECS Programs	2017/18	2018/19
For the 2018/19 **school year**, funding rates remain the same as for the 2017/18 **school year**.		
ECS Administration (See Section 2.6)	**5.4% of ECS funding**	**5.4% of ECS funding**
ECS Base Instruction Funding (per **funded child**)	**$3,339.90**	**$3,339.90**
ECS Regular Transportation (per **eligible transported child**) Also Parent-provided ECS Transportation (including **children with a disability/delay**)	**$549.00**	**$549.00**
ECS Special Transportation (per round trip per **child with a disability/delay** - max of 185 trips)	**$18.24**	**$18.24**
English as a Second Language (ESL) (per eligible **funded child**)	**$589.05**	**$589.05**
Equity of Opportunity (per **funded child**) (see Section 1.14)	**$50.50**	**$50.50**
Mild/Moderate Disabilities/Delays, Gifted and Talented (per eligible **funded child**)	**$2,486.76**	**$2,486.76**
Plant Operations and Maintenance (per **funded child**)	**$397.66**	**$397.66**
Program Unit Funding (PUF)		
Maximum per eligible **funded child**	**$25,051.20**	**$25,051.20**
Maximum for each additional **funded child** in a unit	**$6,215.88**	**$6,215.88**
Regional Collaborative Service Delivery (see sections 4.3, 6.1 and 6.2)	**per formula**	
SuperNet Service Funding (maximum per month per approved site.)	**$400.00**	**$400.00**

Section 9.3 — Accredited Funded Private Schools

Accredited Funded Private Schools Funding	Level 1* 2018/19	Level 2* 2018/19
For the 2018/19 **school year**, all other funding rates remain the same as for the 2017/18 **school year**.		
Base Instruction Funding		
Grades 1 to 9 (per **funded student**)	**$4,007.88**	**$4,675.86**
Grades 10 to 12 (per **CEU** to a maximum of 45 **CEU**s per year per **funded student**)		
See Section 10.1, **CEU** Funding Tiers list		
Tier 1 **CEU** Rate	**$114.51**	**$133.59**
Tier 4 **CEU** Rate (Work Experience and Special Projects)	**$68.70**	**$80.16**
Tier 5 **CEU** Rate (**dual enrolled dual credit**)	**$150.00**	**$175.00**
CEU rate top-up funding for authorized **dual enrolled dual credit** CEUs taken by **funded students** in schools that are block funded, participating in High School Redesign, or are First Nations/First Nation School Authorities	**$35.49**	**$41.41**
CEUs for ADLC courses are funded at 44% of the respective Tier rate above.		
Base Instruction Funding for **Designated Special Education Private Schools (DSEPS)**		
Funding rate for **students with a mild or moderate disability** whose **parents** consulted with their resident **school board** prior to placement in the **DSEPS (**coded as 110).	**$11,639.00**	**$11,639.00**
Funding rate for **students with a mild or moderate disability** whose **parents** did not consult with their resident **school board** prior to placement in the **DSEPS** (do not code as 110). This is also the funding rate for **students with severe disabilities** in **DSEPS** (not including severe disabilities funding).	**$7,537.59**	**$7,537.59**
Early Literacy (per **funded student** in Grades 1 and 2)	**$159.63**	**$159.63**
Education Program in an Institution (see Section 7.1)	**net cost of program**	
English as a Second Language (ESL) (per eligible **FTE funded student**)	**$706.86**	**$824.67**
Equity of Opportunity (per **FTE funded student**) (see Section 1.14)	**$60.60**	**$70.70**
First Nations, Métis, and Inuit (per eligible **FTE funded student**)	**N/A**	**$824.67**
Home Education (per eligible **funded student)**	**$1,670.81**	**$1,670.81**
+ 50% of the cost of ADLC courses for Grades 7-12 to a maximum of:	**$1,670.81**	**$1,670.81**
+ additional funding for Grades 1-6 ADLC courses. (See Section 1.3)	**per formula**	
Northern Allowance (per **FTE funded enrolment**) — **Lower Zone**	**N/A**	**$329.87**
Northern Allowance (per **FTE funded enrolment**) — **Intermediate Zone**	**N/A**	**$494.09**
Northern Allowance (per **FTE funded enrolment**) — **Upper Zone**	**N/A**	**$742.56**
Plant Operations and Maintenance (per eligible **funded student**) — **Grade 1 - 6**	**N/A**	**$556.71**
Plant Operations and Maintenance (per eligible **funded student**) — **Grade 7 - 9**	**N/A**	**$525.83**
Plant Operations and Maintenance (per eligible **funded student**) — **Grade 10 – 12**	**N/A**	**$528.77**
Regional Collaborative Service Delivery (see sections 4.3, 6.1 and 6.2)	**per formula**	
Severe Disabilities Funding (per eligible **funded student**)	**$16,465**	**$16,465**
SuperNet Service Funding (maximum per month per approved site)	**$480.00**	**$560.00**

*per Accountability and Declaration Funding Form, 18AE3.0
Note: For ECS funding rates see Section 9.2

PAYMENT SCHEDULES

Section 9.4 — School Jurisdictions

PART 1 and 4 to 8 – School Jurisdiction Funding

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

Alberta School Foundation Fund (ASFF)

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

Opted-out **boards** will receive a monthly advance on their ASFF payment from Alberta Education and on their local education property tax requisition entitlement. These **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 overdue 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 allocated on a monthly basis at 8.33 per cent per month; with the exception of January and August, which will be at 8.35 per cent and the month of March. An initial payment of 5 per cent will be processed in early March and an additional payment will be made by March 31. If this additional payment does not equal 3.33 per cent, then the difference will be either deducted/added prior to the end of the current **school year**, based on the prior approval of the Assistant Deputy Minister, Strategic Services and Governance.

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Payment Receipt Dates for the following:

PART 1 and 4 to 8 – School Jurisdiction Funding

Sections 1.1 to 1.25, 4.1, 4.2, 6.4, 6.6, 6.7, 6.9, 7.1 and 7.5

September 17, 2018	January 15, 2019	April 15, 2019	August 15, 2019
October 15, 2018	February 15, 2019	May 15, 2019	
November 15, 2018	March 08, 2019	June 17, 2019	
December 17, 2018	March 29, 2019	July 15, 2019	

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 enrolment 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 – First Nations, Métis and Inuit Funding

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Section 4.3 – Regional Collaborative Service Delivery (RCSD) Funding

September or upon approval of Strategic Plan	⇔ 58.33% advance
March/April	⇔ 100% less previous payment and amount over maximum carry forward from previous year

Section 4.4 – Building Collaboration and Capacity in Education

No payments

NEW

Section 4.5 – Innovation in First Nation Education

September/October*	⇔ 100%

*Payment is contingent on receipt of an approved application

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Section 4.6 – First Nation Framework Agreement Enhancement Funding

September/October*	⇔ 100%

*Payment is contingent on receipt of a signed framework agreement

PART 5 – Federal French Funding

Section 5.1 – Federal Francophone Education

Section 5.2 – Federal French Language

March/April	⇔ 100%

PART 6 – Targeted Funding for Provincial Initiatives

Section 6.1 – Regional Collaborative Service Delivery (RCSD) Funding

Section 6.2 – Francophone RCSD Funding

September or upon approval of Strategic Plan	⇔ 58.33% advance
March/April	⇔ 100% less previous payment and amount over maximum carry forward from previous year

Section 6.3 – SuperNet Service Funding

September or upon approval of application	⇔ 58.33% advance
April or upon approval of application	⇔ 100% less previous payments

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Section 6.5 – School Nutrition Program

	⇔ 80% upon approval of proposed budget
On approval of the finalized financial schedule due August 31	⇔ 100% of approved actual expenditures less paid to date

PART 7 – Other Provincial Support Funding

Section 7.2 – Regional Consortium Funding, Management and Infrastructure

September	⇔ 70%
March/April*	⇔ 100% less previous payment

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

Section 7.3 – Regional Consortium Funding, Curriculum Implementation Support

September	⇔ 70%
Before April 30*	⇔ 100% less previous payment

*Payment is contingent on receipt of all required documents including a mid-year report for the current school year and financial statements for the prior school year.

Section 7.4 – Debt Retirement

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

PART 8 – Capital Funding

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Section 8.1 – School Facilities

Payments processed by Alberta Infrastructure

Section 8.2 – Infrastructure Maintenance and Renewal (IMR)

September	⇔ Up to 50%
By April 30	⇔ 100% less previous payment. See Section 10 for IMR reporting requirements.

Section 9.5 – Private ECS Operators

PART 2 – Early Childhood Services (ECS) Funding

The funding provided by Alberta Education to **private ECS operators** is allocated according to the schedules below - provided all conditions have been met. Payments to **private ECS operators** will be received in the last week of the month (based on electronic deposit). With the approval of the Assistant Deputy Minister, Strategic Services and Governance, a March payment may be made up to 90 per cent less previous payment. The **Minister** may authorize an alternate payment schedule for a **school authority** where deemed necessary.

Note: the Initial Operating Plan (IOP) or the Annual Operating Plan (AOP) must be received before the first payment is made.

Sections 2.1, 2.2, 2.5, 2.6 and 2.8

September*	⇔ 20% advance based on lesser of previous year enrolment or AOP enrolment. ⇔ New **private ECS operators** will receive a 20% advance based on enrolments entered into PASI.
October	⇔ 40% based on current year enrolments less previous payment.
January**	⇔ 70% based on current year enrolments less previous payment.
April	⇔ 100% based on current year enrolments 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 per above.

**All ECS programs with mild to moderate, and gifted and talented, children will receive mild/moderate funding based on their current year enrolment count.

Section 2.3 – Program Unit Funding (PUF)

September –**Designated Special Education ECS programs.**	⇔ 40% advance based on the previous year's approved PUF budget amount.
Kindergarten programs –upon approval of a written request to School Finance Branch	⇔ Up to a 30% advance based on lesser of previous year PUF budget or a current year estimate based on number of pre-approved PUF children.
Upon receipt of the PUF application	⇔ 40% less any previous payments
January	⇔ 70% less previous payments
April	⇔ 80% less previous payments
June	⇔ 90% less previous payments
Upon approval of actual PUF costs	⇔ Lesser of approved PUF budget amount, the program ceiling amount or actual costs, less previous payments

Section 2.4 – ECS English as a Second Language

January	⇔ 70% based on current year enrolments
April	⇔ 100% less previous payments

Section 2.7 – ECS Transportation

Payment is based on receipt and approval of a transportation application.

January	⇔	70% advance based on transportation claim
April	⇔	100% less previous payment

PART 5 – Federal French Funding

Section 5.2 – Federal French Language

March/April	⇔	100%

PART 6 – Targeted Funding for Provincial Initiatives

Section 6.3 – 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 9.6 — Accredited Funded Private Schools

PART 3 – Accredited Funded Private Schools Funding

Funding provided by Alberta Education to **accredited funded private schools** is allocated according to the schedules below provided all conditions have been met. With the approval of the Assistant Deputy Minister, Strategic Services, a March payment may be made up to 90 per cent less previous payment. The **Minister** may authorize an alternate payment schedule for a **school authority** where deemed necessary. Refer to Section 10.1

Note: the Initial Operating Plan (IOP) or the Annual Operating Plan (AOP) must be received before the first payment is made.

Grades 1 – 12 Sections, 3.1 to 3.5, 3.6, 3.7 to 3.10 (please refer to table of contents)

Advance payments will be made based on enrolment estimates.

September (Gr. 1-12)	⇔	20% advance based lesser of previous year enrolment/**CEU**s or AOP enrolment.
October (Gr. 1-12)	⇔	40% based on current year enrolments and estimated **CEU**s less previous payments.
January (Gr. 1-9) and DSEPS (Gr. 1-12)	⇔	50% based on current year enrolments/estimated **CEU**s less previous payments.
February (Gr. 1-9) and DSEPS (Gr. 1-12)	⇔	60% based on current year enrolments/estimated **CEU**s less previous payments.
March (Gr. 1-12)	⇔	70% based on current year enrolments/**CEU**s less previous payments.
April (Gr. 10-12)	⇔	70% based on current year **CEU**s less previous payments.
April (Gr. 1-9) and DSEPS (Gr. 1-12)	⇔	80% based on current year enrolments/**CEU**s less previous payments.

May (Gr. 1-9) and DSEPS (Gr. 1-12)	⇔ 90% based on current year enrolments/**CEU**s less previous payments.
June (Gr. 1-9) and DSEPS (Gr. 1-12)	⇔ 100% based on current year enrolments/**CEU**s less previous payments.
August (Gr. 10-12)	⇔ 100% based on current year **CEU**s and enrolment adjustments less previous payments.

PART 5 – Federal French Funding

Section 5.2 – Federal French Language

March/April	⇔ 100%

PART 6 –Targeted Funding for Provincial Priorities

Section 6.3 – 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 7 – Other Provincial Support

Section 7.1 – Education Program in an Institution (EPI)

September	⇔ 40% based on an approved budget.
January	⇔ 70% based on an approved budget less previous payment.
April	⇔ 90% less previous payments.
On approval of final costs	⇔ 100% of actual costs less previous payments.

Section 9.7 — Enrolment Counts

PURPOSE

Enrolment counts are used to determine funding allocations for **school jurisdictions**, **accredited funded private schools** and **private ECS operators** and are based on information submitted to PASI and Student Records Branch.

CONDITIONS

1. All ECS children and all students in Grades 1 to 12 who are enrolled and attending a school on the **September count date** of the **school year** will be counted at the **school** they are attending on that date. Enrolment records must be kept on file in the **school authority** or **school** that will substantiate the **September count date** of ECS child/student enrolment data submitted to PASI and Student Records Branch. Students and ECS children enrolled after the **September count date** will not be counted for funding purposes.

2. A **school authority** may count a student who was not physically in attendance on the **September count date** if the student was enrolled and in attendance either in the month of September of the current **school year** or in the last week of June of the previous **school year**; and

   a. who returned to **school** within 15 calendar days of the **September count date**; or

   b. who was referred to the attendance board (with a letter on file);

   c. unless #7 in this section applies.

3. A **school authority** may count a student who was physically in attendance at an **Institution** on the **September count date** if the student was enrolled and in attendance with the **school authority** prior to the **September count date** and returned to the **school** within 30 calendar days after the **September count date**. In the event that a priority **school** conflict occurs, and if the requirements of this condition are met, the decision will be made in favor of the **school authority**.

4. A **funded child/student** who was not physically in attendance in any **school authority** on the **September count date** but was in attendance in a **school authority** prior to the **September count date**, and then changed to a different **school authority**, may be claimed by the receiving **school authority** if the **funded child/student** was enrolled and in attendance within five calendar days of the **September count date**.

5. **Funded children/students** who are receiving their education in a **home education program** provided by their parents will be counted by the supervising **associate board** or **associate accredited funded private school** where the student is enrolled and under supervision on the **September count date**.

6. **School jurisdictions** or funded **private schools** offering year round education to **funded student**s in Grades 1 to 9 will use **September count dates** determined by School Finance on an individual basis to ensure fair and equitable funding for the students they are educating.

7. A priority school conflict (PSC) occurs when more than one **school** claims the **funded child/ student** on the **September count date**. In the situation that more than one **school** is claiming the same **funded child/student** for funding purposes, the priority **school** is the **school** in which a **funded child/student** is deemed to have been enrolled and in attendance on the **September count date**.

8. Priority school conflicts must be resolved before a **school authority** is entitled to receive funding for a **funded child/student**. When priority school conflicts occur, **school authorities** should make every effort to resolve them as they have first-hand knowledge of the instruction the student is receiving and are in the best position to determine a fair and equitable solution.

9. If **school authorities** cannot resolve a priority school conflict, they should forward supporting documentation as follows to the School Finance Branch by the last Friday in February for resolution. If School Finance must resolve the conflict, only Base Instruction Funding will be provided.

   For Grades ECS to 9

   a. 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.

   b. In the event of a priority school conflict involving a PUF child, the decision will be in favor of the **school authority** that submitted the PUF application - only if they are providing the child's ECS instruction. If the priority school conflict involves an **ECS operator** who is providing the PUF child's ECS instruction and another **ECS operator** who is providing the PUF child's services and supports, the decision will be in favor of the **ECS operator** that is providing the ECS instruction.

   c. If more than one **school authority** substantiates enrolment and attendance on the **September count date**, the priority school conflict will be resolved in favor of the authority that provided the most programming.

   d. If a **funded child** is enrolled in two ECS programs at two different **school authorities** (i.e. one in the morning and the other in the afternoon) and attendance on the **September count date** can be substantiated at both, funding will be allocated at 50 per cent to each **ECS operator**.

   For Grades 10 to 12

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   a. Instructional minutes for the first **term** (September to January) are required. These minutes shall be based on the number of credits for all the courses that the **funded student** was registered in at the school during the first **term** and half credits for **term** 3. Note: Do not factor in second **term** courses.

      i. For the purpose of determining instructional minutes, all credits shall be counted as 25 hours or 1,500 instructional minutes.

      ii. All 3 credit courses shall be counted as 2.5 credits x 1,500 minutes.

   b. In resolving priority school conflicts, the priority school will be determined as follows:

      i. The school where the **funded student** was enrolled, and in attendance, on the **September count date**;

      ii. If the **funded student** was enrolled, and in attendance, in two or more **school authorities** on the **September count date**:

         - The school where the **funded student** was registered for the majority of instructional minutes in the first **term** of the current **school year** would be deemed the priority school; or
         - In situations where instructional minutes are the same for two **school authorities**, funding will be distributed at 50 per cent of the Base Instruction rate applicable to each **school authority**.

   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.

   Course conflicts must be resolved online in the Funding Event System (FES). 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 10 – Reporting Requirements and Additional Information

Section 10.1 — Reporting Requirements and Information

Accredited Funded Private Schools

1. An **accredited funded private school** must have a minimum of seven or more full-time equivalent **(FTE) students** enrolled from two or more families on the **September count date** who continue to be enrolled in school. This requirement applies for the first year of operation when the **school** is unfunded as well as to the years when they are funded. If the above requirement is not met in the first year, they will have to repeat another year of unfunded operations. The seven or more **FTE students** must not include ECS children or students enrolled in home education programs or the percentage of a student's time for the home education portion of a **shared responsibility program**. If enrolment drops below seven **FTE students** or if enrolment does not come from two or more families, the **accredited funded private school** must notify the Provincial Coordinator of Private Schools in the School Accreditation and Standards Branch.
2. An **accredited funded private school** accredited through the School Accreditation and Standards Branch and approved by the **Minister** will be required to provide instruction to students for a minimum of one year before it is eligible for funding unless otherwise approved by the **Minister**.

> **Level 1** – the accountabilities ascribed to this **accredited funded private school authority** will continue to be those used by Alberta Education during the 2007/2008 **school year** and eligible funding allocations will be at the level 1 funding rates (60 per cent) as outlined in this manual.
>
> **Level 2** – the accountabilities ascribed to this **accredited funded private school authority** will include accountabilities that are part of the provincial accountability program. Eligible funding allocations will be at level 2 funding rates (70 per cent) as outlined in this manual.

3. An **accredited funded private school** must keep in force a blanket fidelity bond with respect to all employees and board members in an amount acceptable to the **Minister**. That amount shall be $50,000 or the amount of the accumulated surplus plus 40 per cent of Alberta Education funding for the program year, whichever is less. Agents may refer to this as a commercial blanket bond.
4. New **accredited funded private schools** are required to provide a Certificate of Incorporation for a society incorporated under the *Societies Act,* or a non-profit company registered under Part 9 of the *Companies Act,* or a non-profit corporation incorporated under an act of the Legislature.
5. **Accredited funded private schools** must provide Audited Financial Statements for the previous year ending August 31, to the Financial Reporting and Accountability Branch by November 30 each year. Failure to do so will result in delayed payment.

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6. **Accredited funded private schools** must remain in active status according to Corporate Registries. Payments may be withheld of operations not in good standing or of those that have outstanding annual returns with Corporate Registries.

Base Instruction Funding

1. All enrolment information must be submitted through PASI and Student Records.
2. Base instruction funding is based on:
   a. Student registration information in ECS and Grades 1 to 9 as of the **September count date** that is submitted to PASI and Student Records by the third business day in October;
   b. Course completion information for students in Grades 10 to 12 as follows:
      i. Student Information System for specific enrolment and course marks that are submitted to PASI.
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 student records pursuant to the *Student Record Regulation* 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.

   Adjustments to enrolment data:

   a. if an adjustment is required to the enrolment data reported to PASI and Student Records on the **September count date**, **school authorities** must ensure that changes are made through PASI.
   b. any modification that will impact funding must be submitted through PASI by February 1.
4. Base funding for **funded students** attending school in another province will be based on:
   a. an **education services agreement**; and
   b. a letter submitted to School Finance indicating the student's name, birth date, grade and Alberta Student Number (ASN).
5. **School jurisdictions** must submit colony school student registration information as of the **September count date** to PASI and Student Records.
6. High School
   a. To receive 35 **CEUs** of Base instruction funding for high school **refugee students** (code 640), **school jurisdictions** must have documents on file from Immigration, Refugees and Citizenship Canada that substantiate their refugee status.

CEU Funding Tiers

REVISED

CEU funding is provided according to the following tiers of courses and is based on the funding rates provided in sections 9.1 and 9.3. All academic courses including locally developed courses, knowledge and employability courses, registered apprenticeship program courses, and language courses are funded at the tier 1 rate. CTS courses are funded per the rates in tiers 1, 2 and 3. Work experience and special projects courses are funded at the tier 4 rate. **Dual credit** and dual enrolled courses are funded at the tier 5 rate. Since funding for tiers 2 and 3 includes class size funding, these tiers only apply to **school jurisdictions**.

Accredited funded private schools offering tier 2 and 3 courses will be funded at the tier 1 rate for these courses.

Courses taken through the Alberta Distance Learning Centre (ADLC) are funded at 44 per cent of the respective tier rate.

Tier 1 Courses: CTS course codes with the following prefixes:	
Course Prefix	
CTR	Career Transitions
CMH	Community Health
ENS	Environmental Stewardship
ENT	Enterprise and Innovation
FIN	Financial Management
HCS	Health Care Services
HSS	Human and Social Services
INF	Information Processing
LGS	Legal Studies
LOG	Logistics
MAM	Management and Marketing
PRS	Primary Resources
TOU	Tourism

Tier 2 Courses: CTS course codes with the following prefixes:	
Course Prefix	
AGR	Agriculture
CJS	Criminal Justice Studies
CSE	Computing Science
DES	Design Studies
EST	Esthetics
FAS	Fashion Studies
FOR	Forestry
REC	Recreation Leadership
WLD	Wildlife

Tier 3 Courses: CTS course codes with the following prefixes:	
Course Prefix	
ABA	Auto Body Technician
AEA	Agricultural Equipment Technician Apprenticeship
ASA	Auto Service Tech Apprenticeship
BKA	Baker Apprenticeship
CCS	Community Care Services
CKA	Cook Apprenticeship
CMA	Cabinetmaker Apprenticeship
COM	Communication Technology
CON	Construction
COS	Cosmetology
CRA	Carpenter Apprenticeship
CTA	Communication Technician Apprenticeship
ELT	Electro-Technologies
ETA	Electrician Apprenticeship
FAB	Fabrication
FOD	Foods
HCA	Health Care Aide
HEA	Heavy Equipment Technician
HSA	Hairstylist Apprenticeship
INA	Insulator Apprenticeship
ISA	Instrument Technician Apprenticeship
LGA	Landscape Gardener Apprenticeship
MEC	Mechanics
MWA	Millwright
NET	Networking
PDA	Painter & Decorator Apprenticeship
PEN	Power Engineering
PLA	Plumber
PTA	Parts Technician Apprenticeship
WDA	Welder Apprenticeship

Tier 4 Courses: Work Experience and Special Projects courses:	
Course Prefix	
OTH	Work Experience
OTH	Special Projects

Charter Schools

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

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

Designated Special Education Private Schools (DSEPS)

The status of approved **DSEPS** may be reviewed and withdrawn at any time by Alberta Education.

Duplicate Course Marks

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

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

Early Childhood Services (ECS)

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.
2. **Funded children** who were enrolled in an **ECS program** with an **ECS operator** on the **September count date** but were assessed and identified as having severe, mild or moderate disabilities/delays or as gifted and talented after the **September count date**, the **ECS operator** must modify the enrolment in PASI. The data must be submitted by February 1 to receive funding.
3. For **ECS programs** commencing after the **September count date**, the count will be taken as of the last operating day in the month in which the **ECS program** begins. The information must be submitted through PASI within three days of that date.
4. **ECS programs** commencing after the **September count date** must also submit a letter to the Director of the School Finance Branch indicating that they are a late starting program, the start date of the program, and a list of all ECS children enrolled with their Alberta Student Numbers (ASN's). This information must be submitted to the School Finance Branch by October 31.
5. Hutterite children are eligible for pro-rated ECS funding based on an application by the **school jurisdiction** to the Field Services Director.
6. **Private ECS operators** must provide Audited Financial Statements for the previous year ending August 31, to the Financial Reporting and Accountability Branch by November 30 each year. Failure to do so will result in delayed payment.

Education Program in an Institution (EPI)

INSTRUCTIONS FOR EPI FUNDING APPLICATIONS

There are two categories of EPI:

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

ALLOWABLE COSTS:

1. Instructional Salary Costs
   a. Certified Salaries & Benefits: teacher/school administration salaries and benefits.
   b. Uncertified Salaries & Benefits: teacher assistants and office staff.
   c. Substitute Teacher(s): costs for substitute teachers when teachers or teacher assistants are not in school.
2. Supplies and Services Costs
   a. Professional development: staff training, conferences, and in-services.
   b. Educational supplies: materials and resources which students/teachers require for the educational program, such as textbooks, notebooks, CDs, DVDs, pens and pencils.
   c. Educational services: costs for educational or psychological assessments directly related to providing the educational programs.

      Note: Counselling, treatment, therapy or psychiatric services are not to be included in this category as these are the responsibility of Health, Justice and Solicitor General or the agency operating the **institution**.
   d. Office supplies: materials for the administration of the school program such as paper, pens, binders, files.

      Note: Office capital equipment such as copiers, furniture, fixtures for the classroom or office are not to be included in this category as these costs are the responsibility of Health, Justice and Solicitor General or the agency operating the **institution**.
3. Technology Costs are based on the lesser of:
   a. $500 x the average number of **institutional students** to a maximum of:
      21 to 50 students = $20,000
      51 to 100 students = $40,000
      Over 100 students = $50,000

      Mixed programs calculate costs based on **institutional students** only, (line D of the budget form) or;
   b. actual costs not exceeding the above formula.

REVENUES:

Please list:

1. Expected base instruction revenues for **institutional students** enrolled on the **September count date**.
2. Other expected revenues (see form 18AE7.1) for **institutional students**, not including EPI funding payments.

AVERAGE NUMBER OF STUDENTS ENROLLED:

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

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

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

English as a Second Language (ESL)

1. Student registration information for ECS to Grade 12 as of the **September count date** and as of the **March count date** of the current **school year** must be submitted to the PASI and Student Records Branch.
2. This registration must include English language learners in the following categories:
   a. Canadian-born **funded child** or **funded student** (code 303);
   b. Foreign-born **funded child** or **funded student** (code 301); and
   c. Canadian-born or foreign-born child/student who does not meet the criteria as a **funded child** or **funded student** (code 302).
3. Code 303 and/or code 301 are required for **school authorities** to receive ESL funding.

First Nations

School authorities with **funded students** attending First Nations schools under an **education services agreement** are eligible to receive base instruction funding as well as other FTE-funded grants based on student information provided on Form 18AE1.2b.

Francisation

1. Student registration information for ECS to Grade 12 as of the **September count date** and as of the **March count date** of the current **school year** must be submitted to the PASI and Student Records Branch.
2. This registration must include **Francisation** students in the following categories:
   a. Canadian-born (code 306); and
   b. Foreign-born (code 307)
3. This coding is required for **Francophone Regional Authorities** to receive **Francisation** funding.

Home Education

1. Home education funding is based on:
   a. student registration information (including **resident board** information) in Grades 1 to 12 as of the **September count date** that is submitted to PASI and Student Records;
   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 18AE1.3a); and
   c. the application for additional ADL course costs for **home education students** in Grades 1 to 6 enrolled in courses at the ADLC (Form 18AE1.3b).

Infrastructure Maintenance and Renewal (IMR)

1. IMR projects for upgrading building components to meet health and safety standards, to replace failed facility components, or to meet municipal requirements, whose costs exceed $1 million require ministerial approval. IMR projects of less than $1 million do not require ministerial approval.
2. All projects over $200,000 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.
3. A Statement of Actual Expenditures for the previous **school year** for IMR projects must be submitted to the Capital Planning Sector by December 31. If this statement is not received, it may affect payment of the second funding installment prior to April 30.

Locally Developed Courses

REVISED
1. **School authorities** offering locally developed senior high school courses must be granted the use of a senior high course code by Alberta Education to award credits to students and receive the relevant **CEU** funding. Course codes are provided to **school authorities** for a specified term for each locally developed senior high course that has been authorized by Alberta Education and locally approved by a resolution or a motion of the board of a **school authority** or governing body of a private school authority prior to offering locally developed course.

REVISED
2. **School authorities** shall submit for authorization all locally developed courses (including second language courses) according to the *Guide to Education*.

Outreach Programs

When an **outreach program** ceases to operate, the **board** must immediately notify the respective Field Services Branch Director.

Program Unit Funding (PUF)

REVISED
1. **School authorities** shall apply for program unit funding using the electronic PUF application in the Program Unit Funding System (PUFS). The PUF application is due November 15.

REVISED
2. **School Jurisdictions** must submit a PUF application, no budget required, by November 30. If a school jurisdiction submits a PUF budget, it will not be reviewed or approved by Alberta Education.

REVISED
3. **Accredited funded private schools** and **private ECS operators** must submit a PUF application (due November 15), including a budget (due November 30).
4. PUF Expenses Rules (PUF Budget Page and statement of actual PUF expenditures)
   a) Instructional Salaries and Wages: special education consultation costs typically range from $1,000 to $1,500 per child. Classroom teacher costs are <u>not</u> eligible PUF costs for regular ECS PUF programs**.** Base instruction funding is provided for classroom teacher costs.
   b) Supplies and Materials: costs typically range from $200 to $400 per child with a maximum of $500 per child. The maximum of $500 per child is only allowed under exceptional circumstances and should be discussed with the Learner Services Branch.
   c) Parent In-service: cost typically range from $100 to $300 per child with a maximum allowed of $400 per child.
   d) Staff In-service: costs typically range from $200 to $400 per child with a maximum allowed of $500 per child.
   e) PUF Transportation Revenues: must match the amounts claimed on the transportation grant application.
   f) Program Coordination Costs: **school jurisdictions** only. These costs typically range from $900 to $1,500 per child.
   g) Specialized Equipment and Furniture: Only equipment and furniture approved by Learner Services can be claimed.
   h) **Designated Special Education ECS programs** may claim classroom teacher costs.

i) Private **Designated Special Education ECS programs** may claim reasonable costs for facility and administration expenses in the 8 to 12 per cent range.

A funded child, who is identified as having a severe disability/delay after the September count date, may be added to the PUF application up to February 1. If a PUF child was in attendance before the September count date but was not identified as having a severe disability/delay until after the count date, the appropriate special needs code must be added/changed in PASI, to receive base instruction funding.

REVISED

5. **All school authorities** must report actual expenditures for PUF children using Form 18AE1.5b, which is due October 31.
6. **Private ECS operators** must report actual expenditures for PUF children in the Audited Financial Statements, which are due November 30.

Reciprocal Exchange Programs

School authorities with a **resident student** participating in a **reciprocal exchange program** must submit a Reciprocal Student Exchange Approval Form in order to qualify for funding. The form, which must be submitted by September 30 of the year the student is away on the exchange, can be found at: www.education.alberta.ca/exchange-programs/student-exchanges/everyone/student-exchange-program-brochures

Instructions for completion of the form can be found at:
www.education.alberta.ca/media/1224479/instructions.pdf

Note: the form is not required for students participating in the Alberta International Educational Exchange Program.

Regional Collaborative Service Delivery (RCSD) including Francophone RCSD

1. Alberta Education distributes RCSD funding through designated banker school boards identified by the Regional Executive Team to administer the funds on behalf of all partners.
2. Every **school year**, the Regional Executive Team must:
   a. submit an Annual Plan to the RCSD Provincial Office by June 30 that is approved and signed by the Chair or Co-Chairs of the RCSD Regional Executive Team on behalf of all regional partners and includes Terms of Reference; and;
   b. identify in the Annual Plan, the **school jurisdiction** that will act as the Designated Banker school board through which they will receive and distribute their funding; and

REVISED

   c. submit an Annual Report for the previous **school year** that includes a financial statement to the RCSD Provincial Office by November 30. The Annual Report must be approved and signed by the Chair or Co-Chairs of the RCSD Regional Executive Team and by the designated banker school board on behalf of all regional partners. The budgeted expenditures shall not exceed the total revenues projected, including any surplus funds from the previous year. Alberta Education will not fund any deficits.

When the documents have been submitted and are determined to be acceptable, payments will then be released.

REVISED

3. The designated banker school board can carry forward surplus funds that do not exceed 5 per cent of the region's RCSD funding (not including Other Provincial Allocation). Alberta Education will process recoveries for any amounts in excess of this limit based on the financial statements submitted by designated banker school boards.

NEW

4. The designated banker school board can carry forward surplus funds that do not exceed 5 per cent of the region's Other Provincial Allocation. Alberta Education will process recoveries for any amounts in excess of the limit based on the financial statements submitted by designated banker school boards.

REVISED

5. Administrative costs should not exceed the region's regional management allocation plus up to an additional 4.5 per cent of the region's RCSD funding.

Transportation

Payment is made on the basis of information reported on the rural and urban transportation claims submitted to Business Operations and Stakeholder Support Branch by November 30.

Only **funded students** enrolled on the **September count date** are eligible for this funding.

For parent-provided transportation, **school authorities** must have signed agreements/contracts in place and on file by October 31.

Section 10.2 — Alberta Education Contact List

While Alberta Education makes 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 number, including the area code, of the contact.

BRANCH	CONTACT	PHONE #
Budget and Fiscal Analysis	Sabeeh Farooqui	(780) 422-0857
Business Operations and Stakeholder Support	Richard Arnold	(780) 422-6062
Capital Planning		
Capital Planning North	Travis Hovland	(780) 643-0736
Capital Planning South	Erin Owens	(780) 643-1455
Strategic Planning	Dale Box	(780) 415-5854
Curriculum Division		
French Education Services	Lise Belzile	(780) 422-7794
Quality Assurance and Strategic Supports	Deana Wiens	(780) 427-3776
Field Services:		
Central Services	Margaretha Ebbers	(780) 427-0929
First Nations, Metis and Inuit Services	Ronald Taylor	(780) 427-5411
North Services	Nathan Freed	(780) 422-0795
South Services	Ron Taylor	(403) 297-5021
Financial Reporting and Accountability	Brian Smith	(780) 415-9355
International Education Services	Waldemar Riemer	(780) 422-1540
Learner Services	Joyce Clayton	(780) 422-6551
Official Languages Education Programs	Keith Millions	(780) 422-1899
PASI Project and Student Records studentrecords@gov.ab.ca		(780) 422-9337
School Accreditation and Standards	Kelly Hennig	(780) 427-3429
School and Community Supports for Children and Youth	Marni Pearce	(780) 422-5045
School Finance	Daimen Tan	(780) 422-0865
	Sharon Johnson	(780) 422-0930
	William Poon	(780) 427-2055
Technology Leadership Branch	Charmaine Brooks	(780) 415-8995
Workforce Development Help Desk wfdhelpdesk@gov.ab.ca	Help Desk	(780) 427-5318

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., daimen.tan@gov.ab.ca). The exception to this rule is Ron Taylor who can be contacted by email at RTaylor@gov.ab.ca.

The *2018/19 Funding Manual for School Authorities* is available for viewing and printing on Alberta Education's website at www.education.alberta.ca/funding-framework-for-k-12/funding-manual/.

Unless otherwise indicated, funding application forms should be submitted as email attachments to the School Finance Branch at edc.schoolfinance@gov.ab.ca, or by post to:

Alberta Education
School Finance Branch
8th Floor, Commerce Place
10155 – 102 Street
Edmonton, AB T5J 4L5
Phone: 780-427-2055 Toll free: 310-0000
Fax: 780-427-2147

Section 10.3 — Ceasing of Operations by a Private ECS Operator

POLICY

When funding has been provided by Alberta Education to a **private ECS operator**, and they cease operations, any surplus funds shall be returned to the Government of Alberta or transferred to another approved **ECS operator**.

CONDITIONS

1. The decision to cease operations must have been reached at a general meeting of the society governing the **private ECS operator** called within the provision of the society's or company's bylaws or articles of association.
2. If a **private ECS operator** decides to cease operations, the operator may determine if another **ECS operator** is willing to take over the program. The other **ECS operator** must agree to take over the program and to accept the transfer of assets and liabilities, including supplies, capital assets, and operating surpluses.
3. If a **private ECS operator** does not transfer its assets to another **ECS operator**, Alberta Education will calculate the amount of surplus (if any) from operations to be returned to the Government of Alberta.

PROCEDURES

1. When the **private ECS operator** has made a decision to cease operations, a letter must be sent to the School Accreditation and Standards Branch notifying them of their decision. The letter must also include a copy of the board resolution to cease operations made at a duly called meeting of the society or company.
2. When the **private ECS operator** has agreed to allow another **ECS operator** to take over the program, both parties must sign an agreement for the transfer of the **private ECS operator's** assets and liabilities to the other **ECS operator**. The agreement should also include an inventory schedule of all assets/liabilities to be transferred and signed by officials of the **ECS operator** accepting the transfer. The **private ECS operator** must submit the agreement to the School Accreditation and Standards Branch within 90 days of the signing of the agreement but no later than November 30 following the **school year** that operations ceased.
3. The **private ECS operator** must prepare an Audited Financial Statement (AFS) for the final year of operation or portion thereof and submit it to the Financial Reporting and Accountability Branch by November 30 following the **school year** that operations ceased.
4. If a **private ECS operator** ceases operations during the **school year**, unexpended fees paid by parents for the year should be returned to the **parents**.
5. When the **private ECS operator** ceases operation but does not transfer the assets and liabilities to another **ECS operator**, the final Audited Financial Statements will be reviewed and the accumulated surplus, if any, will be pro-rated by Alberta Education. The portion of the surplus to be returned to Alberta Education will be calculated on the ratio of Alberta Education's contribution to the total revenue of the **ECS program** over the final three years of operation. The amount payable to Alberta Education will be communicated by letter from the Director of the School Finance Branch.
6. A **private ECS operator**, who ceases operations and does not enter into an agreement with another **ECS operator**, should sell their assets or make arrangements with Alberta Education to transfer the capital assets and supplies to another **ECS operator** or program provider in their area.

Section 10.4 — 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 10.5 — Withdrawal of Teacher Services or Lockout

POLICY

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

CONDITIONS

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

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Funding Application Deadlines and Other Important Deadlines

	FORM NO.	FUNDING APPLICATION FORM	DUE DATE	RETURN TO
	18AEDSA	Delegation of Signing Authority Form	**October 31, 2018**	SF
	18AE1.2b	Funded Students Attending First Nations Schools	**October 31, 2018**	SF
	18AE1.2c	Declaration of Management for 2018/19	**October 31, 2018**	SF
	18AE1.3a	Application for Reimbursement of ADLC Course Costs for Home Education Students in Grades 7 to 12.	**May 31, 2019**	SF
	18AE1.3b	Funding Application for Additional ADLC Course Costs for Home Education Students in Grades 1 to 6	**May 31, 2019**	SF
	18AE1.5b	ECS PUF Statement of Actual Expenditures (2017/18)	**October 31, 2018**	SF
REVISED	Electronic Submission	ECS PUF application submission – including children details (Private Schools, Private ECS Operators and Charters)	**November 15, 2018**	SF
	Electronic Submission	ECS PUF application submission – including children details (Jurisdictions)	**November 30, 2018**	SF
	Electronic Submission	ECS PUF Budget including details and supporting PUF budget template as an attachment (Private Schools, Private ECS Operators and Charters).	**November 30, 2018**	SF
	Electronic Submission	Application Form - Rural Transportation	**November 30, 2018**	BOSS
		Application Form - Special Transportation and Boarding	**November 30, 2018**	BOSS
REVISED		Application Form - Urban Transportation	**November 30, 2018**	BOSS
	Electronic Submission	Application Form - ECS Transportation (Private ECS and Private Schools offering ECS programs)	**October 31, 2018**	BOSS
	Electronic Submission	Application for Alberta Dual Credit start-up funding	**October 30, 2018**	Alberta Dual Credit Webpage
	18AE3.0	Accredited Funded Private School Authority Accountability and Funding Declaration	**April 30, 2018**	SF
	18AE6.3	SuperNet Service Funding Application	**Upon Connection**	TLB
	18AE7.1	Institutional Programs – Budget (2018/19)	**April 30, 2018**	SF
		– Final (2017/18)	**October 15, 2018**	SF
	18AE7.5	Ft. McMurray Allowance FTE Calculation Form	**January 31, 2019**	SF
	18AE8.2	2018-2019 Capitalized IMR Expenditure Plan	**TBD**	SF

LEGEND	SF	=	School Finance Branch
	TLB	=	Technology Leadership Branch
	BOSS	=	Business Operations and Stakeholder Support Branch

Other Important Deadlines	Due Date
September count date	**September 28, 2018**
September count submission date	**October 3, 2018**
Course and Marks Submission or Modification (prior school year) -Term 2, 3, 4	**October 13, 2018**
Submission of Education Services Agreements (if applicable)	**November 15, 2018**
Submission of Shared Responsibility program percentages	**November 30, 2018**
Duplicate Course Marks (prior school year) - Respond in the Funding Event System (FES)	**November 30, 2018**
-Submission of documentation for Duplicate Course Marks (prior school year)	**December 28, 2018**
Adjustments/changes to Enrolment data and coding in PASI	**February 1, 2019**
Resolution of Priority School Conflicts	**February 15, 2019**
-Back-up documentation for Priority School Conflicts	**February 22, 2019**
March count date	**March 1, 2019**
March count submission date	**March 6, 2019**
Course and Marks Submission or Modification to SCM (School Course Marks)	
-Term 1	**May 15, 2019**
-Term 2, 3, 4	**October 11, 2019**
Course Conflicts	
-All Terms	**November 15, 2019**

Delegation of Signing Authority
2018/19 School Year

This form is provided to allow the delegation of the Secretary-Treasurer's/Treasurer's and/or Superintendent's/President's signing authority to other individuals who are authorized by the board to sign Alberta Education funding applications on behalf of the Secretary-Treasurer/Treasurer Superintendent/President. In order for the delegation of authority to continue, this form must be submitted each year – even if there are no additions or deletions. If this form is not submitted to School Finance, then only the Secretary-Treasurer/Treasurer and the Superintendent/President are authorized to sign on behalf of the school authority.

School Authority Name: _____

School Authority Code: _____

NAME(S) (Please Print)	POSITION	SIGNATURES

CERTIFICATION

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

_____ _____

Signature of Secretary – Treasurer **Date**

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Funded Students Attending First Nations Schools on a Reserve
2018/19 School Year

School Jurisdiction Name: _____

School Authority Code: _____

Alberta Student Number (ASN)	Name of Student	Birth date			Grade	First Nations School
		YY	MM	DD		

CERTIFICATION

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

_____ _____

Signature of Secretary – Treasurer **Date**

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Declaration of Management
2018/19 School Year

School Jurisdiction Name: _____

School Authority Code: _____

"As the Superintendent and Secretary-Treasurer, we certify that our jurisdiction's management controls related to the submission of Credit Enrolment Units (CEUs) have been reviewed and approved, and that these controls are aligned with the funding requirements for CEU funding as outlined in Alberta Education's *Funding Manual for School Authorities*."

TITLES / NAMES [Please Print Name]	**SIGNATURES**	**DATE**
Superintendent		
Secretary-Treasurer		

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Application for Reimbursement of ADL Course Costs for Home Education Students in Grades 7 to 12 2018/19 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.

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

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

Alberta Student Number (ASN)	Name of Student (Alphabetical) Surname/Given Name(s)	ADLC File No.	Grade	Course Code	Approved ADL Course Costs
				TOTAL	$0.00

For Course and Course Costs information please refer to the appropriate Course Guide which is available on the ADLC website at: www.adlc.ca under "View Course Catalogue". Only approved ADLC Print course costs for Tuition Fees, Lesson Materials and Required Resources are eligible for reimbursement at 50% to a maximum of $1,670.81 per student. Costs for online courses and optional resources are not eligible for this funding.

CERTIFICATION

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

Signature of Secretary-Treasurer/Superintendent	Signature of Teacher/Principal	Date

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Application for Reimbursement of ADL Course Costs for Home Education Students in Grades 1 to 6 2018/19 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.

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

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

Alberta Student Number (ASN)	Name of Student (Alphabetical) for which a full course load has been purchased Surname/Given Name(s)	Grade	ADL Course Costs in Excess of 50% Funding provided by the Associate Board
		TOTAL	$0.00

For Course and Course Costs information please refer to the appropriate Course Guide which is available on the ADLC website at: www.adlc.ca under “View Course Catalogue”. Only approved ADLC Print course costs for Tuition Fees, Lesson Materials and Required Resources are eligible for reimbursement at 50% to a maximum of $1,670.81 per student. Costs for online courses and optional resources are not eligible for this funding.

CERTIFICATION

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

Signature of Secretary-Treasurer/Superintendent	Signature of Teacher/Principal	Date

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Statement of Actual Program Unit Funding (PUF) Expenditures for School Authorities 2017/18 School Year

School Authority Name : _____

Authority Code: _____

- Complete one statement of actual expenditures for all Program Unit Funded (PUF) children.

- Final payment of Program Unit Funding will be determined as follows:
  - School Jurisdictions - lesser of actual expenditures and ceiling; or
  - Private ECS Operators and Private Schools with ECS Programs - lesser of actual expenditures, approved budget and ceiling.

- Guidelines for expenditures are found in the Funding Manual for School Authorities, Section 10.1, Program Unit Funding (PUF)

Contact Name : _____ Telephone No.: _____

CERTIFICATION

FUNDING CALCULATION:

i) Actual Expenditures (from pg. 2/3)	$
ii) Approved Budget total (dept. only)	$
iii) Funding Ceiling Total (dept. only)	$

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

_____ _____

Signature of Secretary-Treasurer **Date**

FOR DEPARTMENT USE ONLY:

Allocation Approved $ _____

Approved By _____ _____

Signature of Expenditure Officer **Date**

ECS Program Unit Funding Statement of Actual Expenditures for School Authorities 2017/18 School Year

School Authority Name: _____

	Budget [1]	Actual
INSTRUCTIONAL COSTS:		
Supplemental Instructional Salaries and Wages		
Employer's Portion of Benefits		
Specialized Services and Supports		
Supplies and Materials		
PARENT INSERVICE/STAFF INSERVICE		

TRANSPORTATION COSTS:	Budget [1]	Actual Costs* (A)	Revenue (B)
To and From School			
Family Oriented Programming Sessions			
Other			
TOTALS	$0.00	$0.00	$0.00

*(If reporting Actual Costs, ensure Revenues are reported) **Net Transportation Costs (A - B)** $0.00

For net transportation Costs if (A)–(B) is negative, enter 0.

	Budget [1]	Actual	
FACILITY COSTS			$0.00
ADMINISTRATION COSTS			$0.00
SPECIALIZED EQUIPMENT AND FURNITURE			$0.00

(ONLY specialized equipment and furniture approved by Learner Services should be claimed)
(Please attach a list of capital items purchased indicating the child's name beside each)

TOTAL ECS PUF EXPENDITURES	**$0.00**

[1] Budget is not required for School Jurisdictions

For Designated Special Education Programs, Designated Special Education Programs in a Private School, Designated Special Education ECS Programs and Congregated sites, please complete page 3.

ECS Program Unit Funding Statement of Actual Expenditures for School Authorities 2017/18 School Year

FOR DESIGNATED SPECIAL EDUCATION/CONGREGATED ECS PROGRAMS ONLY

Submitting for (please circle)**: DSEP DSE(ECS)P DSEP(PS) CONGREGATED**

LESS APPLICABLE REVENUE	# of Applicable Funded Children as at Sept. 30			
Base Instruction Funding (jurisdictions incl class size)		x	$4,100.74	$0.00
Base Instruction Funding (private)		x	$3,339.90	$0.00
Mild or Moderate Disabilities (Private Schools and ECS Private Operators only)		x	$2,486.76	$0.00
Inclusive Education (school Jurisdictions only - supports and services and per student allocation for non-PUF children only)		x	$261.86	$0.00
English as a second language (grant code 301 & 303)		x	$589.05	$0.00
First Nation, Métis and Inuit (code 331, 332, 333, 334)		x	$589.05	$0.00
Equity of Opportunity		x	$50.50	$0.00
ECS Administration				$0.00
Socio Economic Status		incidence rate		$0.00
Plant Operation and Maintenance (private)		x	$397.66	$0.00
Other Alberta Education Revenues Specify:				$0.00
				$0.00
				$0.00
				$0.00
TOTAL REVENUES				**$0.00**
NET ECS PROGRAM COSTS ELIGIBLE FOR PUF				**$0.00**

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Accredited Funded Private Schools Accountability and Funding Declaration 2018/19 School Year

Accredited Funded Private School Authority Name: _____

Accredited Funded Private School Authority Code: _____

NOTE: For private schools who have not already applied for Level 2 funding. To apply for Level 2 funding for the 2018/2019 school year, this Declaration must be submitted to Alberta Education, School Finance Branch by **April 30, 2018.**

Level 1 – the accountabilities and monitoring activities ascribed to this accredited funded private school authority will continue to be those used by Alberta Education. Eligible funding allocations will continue to include grants as authorized in the *Funding Manual for School Authorities 2018/19 School Year*.

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 *Funding Manual for School Authorities 2018/19 School Year*.

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 current 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 subsequent school years, through the submission of an authorized Accredited Funded Private School Accountability and Funding Declaration.

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

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

As the Board Chairperson, Principal/Superintendent and Treasurer, we certify our decision to choose Level 2 accountabilities and funding allocations to our accredited funded private school authority for the 2018/2019 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	SIGNATURES	DATE
Board Chair		
Principal or Superintendent		
Treasurer		

For Department Use Only:

Reviewed By:

School Accreditation and Standards _____ Date: _____

System Assurance _____ Date: _____

School Finance _____ Date: _____

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Supernet Service Funding Application
2018/19 School Year

School Authority Name: _____

Authority Code: _____ **Contact Name:** _____

Phone No.: _____ **E-mail:** _____

School Code (if applicable)	Site Name	Site Address	SuperNet Service Connection Date	Monthly SuperNet Service Charge

CERTIFICATION

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

_____ _____

Signature of: Secretary-Treasurer/Superintendent **Date**

Approved by

_____ _____

TLB **Date**

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Return to: School Finance Branch by email at edc.schoolfinance@gov.ab.ca

Education Program in an Institution (EPI)
Funding Application Form
2017/18 School Year

Under Review

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

Contact Person: _____ **Telephone:** _____

Please complete the same form for both budget and actual submission. The budget submission was due April 28, 2017. To complete Actuals reporting, please update the same form that contains your budget and resubmit with actual net program costs. Actuals reporting is due October 15, 2018.

Name of Program	School Code	BUDGET - Net Program Costs	ACTUALS - Net Program Cost	Variance	% Variance
					#DIV/0!
					#DIV/0!
					#DIV/0!
					#DIV/0!
					#DIV/0!
					#DIV/0!
					#DIV/0!
					#DIV/0!
Total Net Program Costs		$ -	$ -	#DIV/0!	#DIV/0!

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 day students as defined the the Funding Manual 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 Learner Services Branch 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 Program Costs $ _____

_____ _____

Performance Certifier **Date**

Total Net Program Costs $ _____

_____ _____

Expenditure Officer **Date**

Education Program in an Institution (EPI)
Funding Application Form
2018/19 School Year

Under Review

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

Contact Person: _____ **Telephone:** _____

Please complete the same form for both budget and actual submission. The budget submission is due April 30, 2018. To complete Actuals reporting, please update the same form that contains your budget and resubmit with actual net program costs. Actuals reporting is due October 15, 2019.

Name of Program	School Code	BUDGET - Net Program Costs	ACTUALS - Net Program Cost	Variance	% Variance
					#DIV/0!
					#DIV/0!
					#DIV/0!
					#DIV/0!
					#DIV/0!
					#DIV/0!
					#DIV/0!
					#DIV/0!
Total Net Program Costs		$ -	$ -	#DIV/0!	#DIV/0!

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 day students as defined the the Funding Manual 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 Learner Services Branch 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 Program Costs $ _____

_____ _____

Performance Certifier **Date**

Total Net Program Costs $ _____

_____ _____

Expenditure Officer **Date**

Regular EPI Program
Final Costs
2017/18

NAME OF PROGRAM:

CONTACT PERSON: **TELEPHONE:**

TYPE OF INSTITUTION: Public

Please see Instructions (attached) for completion of this form. Also see Section 7.1 of the *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.

	FTEs		
1 Instructional Salary Costs			
a. Certificated Salaries & Benefits			
b. Uncertificated Salaries & Benefits			
c. Substitute Teacher(s)			
Total Instructional Salary Costs			$0.00
2 Supplies and Services Costs			
a. Professional Development			
b. Educational Supplies			
c. Education Services			
d. Office Supplies			
Total Supplies and Services Costs			$0.00
3 Technology costs (see guidelines for formula)			
TOTAL PROGRAM COSTS			$0.00 **A**

REVENUES RECEIVED FOR INSTITUTIONAL STUDENTS		**# Inst. Students**	
Note: please do not include Institutional funding			
1. **Base Instruction** (based on Sept 30 enrolments of 550 coded students) Number of Institutional students enrolled			$0.00
2. **Class Size** (grades 1-3)			$0.00
3. **Equity of Opportunity** (per student component only)		0	$0.00
4. **Inclusive Education** (supports and services and per student alloc)		0	$0.00
5. **English as a second language** (grant code 301 & 303)			$0.00
6. **First Nations, Métis and Inuit** (enrol code 331,332,333,334)			$0.00
7. **Socio Economic Status**	Incidence rate:	0	$0.00
8. **Other funding (please specify)**			
TOTAL REVENUES			$0.00 **B**
NET PROGRAM COSTS (Total Program Costs less Total Revenues **(A – B = C)**			**$0.00** **C**

Final Claims - please attach a list of Institutional Students (with ASNs) in attendance on September 30.

Instructions for Completion of the EPI Funding Application

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

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

2. **Supplies and Services Costs**
   a) Professional Development: staff training, conferences, in-services
   b) Educational Supplies: materials and resources which students require for the educational program (e.g. textbooks, notebooks, technology licensing fees)
   c) Educational Services: costs of educational or psychological assessments directly related to providing the educational program, including costs of field trips that are educational in nature.

   Note: Counseling, treatment, therapy or psychiatric services are not to be included in this category as these are the responsibility of the Regional Health Authority, Alberta Solicitor General or the agency operating the **institution**.
   d) Office Supplies: materials for the administration of the school program such as; paper, pens, binders, files.

   Note: Office capital equipment such as copiers, furniture, fixtures for the classroom or office are **not** to be included in this category as these costs are the responsibility of the Alberta Health and Wellness, Alberta Solicitor General or the agency operating the **institution**.

3. **Technology Costs**
   Computers and computer upgrades, peripherals such as printers for instructional use and assistive devices for students with special education needs; technical support; and software for teacher and student use that supports the learner outcomes identified by Alberta Education. Technology costs will be calculated using the lesser of the following amounts:
   a) Actual costs not exceeding the formula amounts in (b) below, or
   b) $500 X the average number of students enrolled (line D of the budget form) to a maximum of:
      21 to 50 students =$20,000 51 to 100 students =$40,000 over 100 students =$50,000

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 EPI Budgets, please use monthly enrolments from the prior school year. For EPI Finals, please use monthly enrolments for the school year.

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

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

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

Use the 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.

Under Review

Regular EPI Program Budget 2018/19

NAME OF PROGRAM:

CONTACT PERSON: **TELEPHONE:**

TYPE OF INSTITUTION: Public

Please see Instructions (attached) for completion of this form. Also see Section 7.1 of the *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.

	FTEs		
1 Instructional Salary Costs			
a. Certificated Salaries & Benefits			
b. Uncertificated Salaries & Benefits			
c. Substitute Teacher(s)			
Total Instructional Salary Costs			$0.00
2 Supplies and Services Costs			
a. Professional Development			
b. Educational Supplies			
c. Education Services			
d. Office Supplies			
Total Supplies and Services Costs			$0.00
3 Technology costs (see guidelines for formula)			
TOTAL PROGRAM COSTS			$0.00 **A**

REVENUES RECEIVED FOR INSTITUTIONAL STUDENTS		**# Inst. Students**	
Note: please do not include Institutional funding			
1. **Base Instruction** (based on Sept 30 enrolments of 550 coded students) Number of Institutional students enrolled			$0.00
2. **Class Size** (grades 1-3)			$0.00
3. **Equity of Opportunity** (per student component only)		0	$0.00
4. **Inclusive Education** (supports and services and per student alloc)		0	$0.00
5. **English as a second language** (grant code 301 & 303)			$0.00
6. **First Nations, Métis and Inuit** (enrol code 331,332,333,334)			$0.00
7. **Socio Economic Status**	Incidence rate:	0	$0.00
8. **Other funding (please specify)**			
TOTAL REVENUES			$0.00 **B**
NET PROGRAM COSTS (Total Program Costs less Total Revenues **(A – B = C)**			**$0.00** **C**

Final Claims - please attach a list of Institutional Students (with ASNs) in attendance on September 30.

Instructions for Completion of the EPI Funding Application

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

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

2. **Supplies and Services Costs**
   a) Professional Development: staff training, conferences, in-services
   b) Educational Supplies: materials and resources which students require for the educational program (e.g. textbooks, notebooks, technology licensing fees)
   c) Educational Services: costs of educational or psychological assessments directly related to providing the educational program, including costs of field trips that are educational in nature.

   Note: Counseling, treatment, therapy or psychiatric services are not to be included in this category as these are the responsibility of the Regional Health Authority, Alberta Solicitor General or the agency operating the **institution**.
   d) Office Supplies: materials for the administration of the school program such as; paper, pens, binders, files.

   Note: Office capital equipment such as copiers, furniture, fixtures for the classroom or office are **not** to be included in this category as these costs are the responsibility of the Alberta Health and Wellness, Alberta Solicitor General or the agency operating the **institution**.

3. **Technology Costs**
   Computers and computer upgrades, peripherals such as printers for instructional use and assistive devices for students with special education needs; technical support; and software for teacher and student use that supports the learner outcomes identified by Alberta Education. Technology costs will be calculated using the lesser of the following amounts:
   a) Actual costs not exceeding the formula amounts in (b) below, or
   b) $500 X the average number of students enrolled (line D of the budget form) to a maximum of:
      21 to 50 students =$20,000 51 to 100 students =$40,000 over 100 students =$50,000

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 EPI Budgets, please use monthly enrolments from the prior school year. For EPI Finals, please use monthly enrolments for the school year.

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

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

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

Use the 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.

Under Review

EPI Mixed Program
Final Costs
2017/18

NAME OF PROGRAM:

CONTACT PERSON: **TELEPHONE:**

TYPE OF INSTITUTION: Private

Please see Instructions (attached) for completion of this form. Also see Section 7.1 of the *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.

		FTEs		
1	**Instructional Salary Costs**			
	a. Certificated Salaries & Benefits			
	b. Uncertificated Salaries & Benefits			
	c. Substitute Teacher(s)			
	Total Instructional Salary Costs			$0.00
2	**Supplies and Services Costs**			
	a. Professional Development			
	b. Educational Supplies			
	c. Education Services			
	d. Office Supplies			
	Total Supplies and Services Costs			$0.00
3	**Technology costs** (see guidelines for formula)			
TOTAL PROGRAM COSTS				$0.00 **A**
Average number of students enrolled **(see instruction sheet for calculation)**				**B**
AVERAGE COST PER STUDENT (A÷B)				#DIV/0! **C**
Average number of Institutional students enrolled **(see instruction sheet for calculation)**				**D**
PROGRAM COSTS FOR INSTITUTIONAL STUDENTS (C x D)				#DIV/0! **E**

REVENUES RECEIVED FOR INSTITUTIONAL STUDENTS		**# Inst. Students**	
Note: please do not include Institutional funding			
1.	**Base Instruction** (based on Sept 30 enrolments of 550 coded students) Number of Institutional students enrolled		$0.00
2.	**Class Size** (grades 1-3)		$0.00
3.	**Equity of Opportunity** (per student component only)	0	$0.00
4.	**Inclusive Education** (supports and services and per student alloc)	0	$0.00
5.	**English as a second language** (grant code 301 & 303)		$0.00
6.	**First Nations, Métis and Inuit** (enrol code 331,332,333,334)		$0.00
7.	**Socio Economic Status** Incidence rate:	0	$0.00
8.	**Other funding (please specify)**		
TOTAL REVENUES			$0.00 **F**
NET PROGRAM COSTS (Total Program Costs less Total Revenues **(E - F = G)**			**#DIV/0!** **G**

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

Instructions for Completion of the EPI Funding Application

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

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

2. **Supplies and Services Costs**
   a) Professional Development: staff training, conferences, in-services
   b) Educational Supplies: materials and resources which students require for the educational program (e.g. textbooks, notebooks, technology licensing fees)
   c) Educational Services: costs of educational or psychological assessments directly related to providing the educational program, including costs of field trips that are educational in nature.

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

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

   Note: Office capital equipment such as copiers, furniture, fixtures for the classroom or office are **not** to be included in this category as these costs are the responsibility of the Alberta Health and Wellness, Alberta Solicitor General or the agency operating the **institution**.

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

   a) Actual costs not exceeding the formula amounts in (b) below, or
   b) $500 X the average number of students enrolled (line D of the budget form) to a maximum of:
      21 to 50 students =$20,000 51 to 100 students =$40,000 over 100 students =$50,000

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 EPI Budgets, please use monthly enrolments from the prior school year. For EPI Finals, please use monthly enrolments for the school year.

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

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

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

Use the 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.

Under Review

EPI Mixed Program Budget 2018/19

NAME OF PROGRAM:

CONTACT PERSON: **TELEPHONE:**

TYPE OF INSTITUTION: Private

Please see Instructions (attached) for completion of this form. Also see Section 7.1 of the *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.

	FTEs		
1 Instructional Salary Costs			
a. Certificated Salaries & Benefits			
b. Uncertificated Salaries & Benefits			
c. Substitute Teacher(s)			
Total Instructional Salary Costs			$0.00
2 Supplies and Services Costs			
a. Professional Development			
b. Educational Supplies			
c. Education Services			
d. Office Supplies			
Total Supplies and Services Costs			$0.00
3 Technology costs (see guidelines for formula)			
TOTAL PROGRAM COSTS			$0.00 **A**
Average number of students enrolled **(see instruction sheet for calculation)**			**B**
AVERAGE COST PER STUDENT (A÷B)			#DIV/0! **C**
Average number of Institutional students enrolled **(see instruction sheet for calculation)**			**D**
PROGRAM COSTS FOR INSTITUTIONAL STUDENTS (C x D)			#DIV/0! **E**

REVENUES RECEIVED FOR INSTITUTIONAL STUDENTS		**# Inst. Students**	
Note: please do not include Institutional funding			
1. **Base Instruction** (based on Sept 30 enrolments of 550 coded students) Number of Institutional students enrolled			$0.00
2. **Class Size** (grades 1-3)			$0.00
3. **Equity of Opportunity** (per student component only)		0	$0.00
4. **Inclusive Education** (supports and services and per student alloc)		0	$0.00
5. **English as a second language** (grant code 301 & 303)			$0.00
6. **First Nations, Métis and Inuit** (enrol code 331,332,333,334)			$0.00
7. **Socio Economic Status**	Incidence rate:	0	$0.00
8. **Other funding (please specify)**			
TOTAL REVENUES			$0.00 **F**
NET PROGRAM COSTS (Total Program Costs less Total Revenues **(E - F = G)**			**#DIV/0!** **G**

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

Instructions for Completion of the EPI Funding Application

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

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

2. **Supplies and Services Costs**
   a) Professional Development: staff training, conferences, in-services
   b) Educational Supplies: materials and resources which students require for the educational program (e.g. textbooks, notebooks, technology licensing fees)
   c) Educational Services: costs of educational or psychological assessments directly related to providing the educational program, including costs of field trips that are educational in nature.

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

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

   Note: Office capital equipment such as copiers, furniture, fixtures for the classroom or office are **not** to be included in this category as these costs are the responsibility of the Alberta Health and Wellness, Alberta Solicitor General or the agency operating the **institution**.

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

   a) Actual costs not exceeding the formula amounts in (b) below, or
   b) $500 X the average number of students enrolled (line D of the budget form) to a maximum of:
      21 to 50 students =$20,000 51 to 100 students =$40,000 over 100 students =$50,000

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 EPI Budgets, please use monthly enrolments from the prior school year. For EPI Finals, please use monthly enrolments for the school year.

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

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

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

Use the 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.

Under Review

Fort McMurray Allowance
FTE Calculation Form
2018/19 School Year

School Authority Name: _____

School Authority Code: _____

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

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

[2] Staff not covered by a collective agreement.

CERTIFICATION

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

_____ _____

Signature of Secretary – Treasurer/Superintendent **Date**

*Eligible school jurisdictions must include a letter from their auditor with the audited financial statements confirming the financial management of these funds.

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Capitalized 2018/19 Infrastructure Maintenance & Renewal

☑ **Expenditure Plan** ☑ **Final Costs**

Jurisdiction:

Fiscal 2018-19 IMR Allocation: ____________________

Deferred IMR March 31, 2018 ____________________

Facility Code	Facility Name	Description	(C) Cat.	Period	Final Cost	Non-Ref. GST	Total Cost	Comments
				TOTAL	$0	$0	$0	#DIV/0!

Under Review

Spent	Apr - Aug 18	$	-
To Spend	Sep 18 - Mar 19	$	-

Category Codes:

ASB - Asbestos removal
BENV - Building Envelope
CODE - Code Orders
CAB - Computer Cabling
COMM - Communications
CONS - Consultant Services
CONT - Contingency
IAQ - Indoor air Quality
E - Electrical
EN - Energy
F - Flooring
F/A - Facility Audit
HC - Handicapped
HVAC - Heating, Ventilation, A/C
INT - Interior
LOCIM - Local Improvements
M - Modernization
NS - Non Supported
PL - Plumbing
R - Roofing
SITE
SEC - Security Systems
SER - Site Services
ST - Structural
TECH - Technology
WR - Washrooms

____________________ Date:____________________
Secretary-Treasurer or Designate
(Signature req'd on last sheet only)

____________________ Date:____________________
Alberta Education

Queries: Brian Smith @ (780) 415-9355 / Brian.Smith@gov.ab.ca
Robert Mah @ (780) 427-3855 / Robert.Mah@gov.ab.ca

Capitalized 2018/19 Infrastructure Maintenance & Renewal

☑ Expenditure Plan ☑ Final Costs

Jurisdiction: Alberta School Jurisdiction No. 123

9999

Fiscal 2018-19 IMR Allocation: $1,829,130

Deferred IMR March 31, 2018 $201,159

Facility Code	Facility Name	Description	(C) Cat.	Period	Final Cost	Non-Ref. GST	Total Cost	Comments
705	WHPS	Project A	HC	Apr - Aug 18			$500,000	Comment 1
705	WHPS	Project B	PL	Apr - Aug 18			$100,000	Comment 2
698	Boyle	Project C	R	Sep 18 - Mar 19			$250,000	Comment 3
				TOTAL	$0	$0	$850,000	46.47%

SAMPLE

Under Review

Spent	Apr - Aug 18	$	600,000
To Spend	Sep 18 - Mar 19	$	250,000

Category Codes:

ASB - Asbestos removal
BENV - Building Envelope
CODE - Code Orders
CAB - Computer Cabling
COMM - Communications
CONS - Consultant Services
CONT - Contingency
IAQ - Indoor air Quality
E - Electrical
EN - Energy
F - Flooring
F/A - Facility Audit
HC - Handicapped
HVAC - Heating, Ventilation, A/C
INT - Interior
LOCIM - Local Improvements
M - Modernization
NS - Non Supported
PL - Plumbing
R - Roofing
SITE
SEC - Security Systems
SER - Site Services
ST - Structural
TECH - Technology
WR - Washrooms

Secretary-Treasurer or Designate Date:
(Signature req'd on last sheet only)

Alberta Education Date:

Queries: Brian Smith @ (780) 415-9355 / Brian.Smith@gov.ab.ca
Robert Mah @ (780) 427-3855 / Robert.Mah@gov.ab.ca

Glossary of Terms

The terms listed in the Glossary of Terms are **bolded** throughout the funding manual.

Accredited Funded Private School

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

Accumulated Deficit from Operations (ADO)

In the Audited Financial Statements – Statement of Changes in Accumulated Surplus and Notes to the Financial Statements or in the Budget Report – Statement of Changes in Accumulated Surplus where the total of Unrestricted Surplus and Operating Reserves is less than zero.

Activity Program

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

Alternative French Language Programs

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

Minimum Instructional Hours:

- 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.

Annual Operating Deficit

In the Audited Financial Statements or the Budget Report - Statement of Revenues and Expenses - where the expenses exceed the revenues.

Annual Work Plan (First Nations)

An annual work plan submitted by **First Nation Education Authorities** approved for First Nation Framework Agreement Enhancement Funding for the current school year by November 30 of each year. The annual work plan will address the following:

1. Develop short, medium and long-term goals of the **First Nation Education Authority**.
2. Fully develop strategies for each goal as identified in the Three-Year Per Student Enhancement Allocation Plan.
3. Identify specific activities and timelines for each strategy in the Three-Year Enhancement Allocation Plan.
4. Performance measurement framework for identified goals, including baseline data and target achievements as outlined in the Framework Agreement.
5. Detailed annual budget based on per student funding allocation.
6. A community report to keep the community informed and engaged.

ASFF Eligible Student

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

1. on the **September count date**, meets the requirement of section 8(1)(b) of the *School Act*;
2. has a **parent** who ordinarily resides in Alberta or is an **independent student** between 18 and 20 years of age who 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;
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 an Indian residing on a reserve pursuant to the *Indian Act* (Canada).

Associate Board

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

Associate Accredited Funded Private School

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

Audition

A trial performance in which an actor, singer, dancer, athlete or other performer demonstrates prowess in his or her abilities where the **audition** results are used to determine entry qualification.

Blended Program (see Shared Responsibility Program)

Board - See definition of "**School board**".

CEU (Credit Enrolment Unit)

A funding unit used to calculate base instructional funding at the high school level for **school authorities**. **CEUs** are assigned when the course, the student, and the student's achievement in a course meet all established criteria as follows:

Course

- Courses delivered to students must align with the provincially mandated Programs of Study
- Must provide access to instructional hours where applicable
- Must meet administrative requirements

Student

To be eligible for **CEU** funding the student taking the course must meet the definition of a **funded student** for the **school year** in which the course is taken. Exception: A student may be eligible for **CEU** funding if they meet all the **funded student** criteria except attendance on the **September count date**. Any questions regarding this criterion may be directed to the School Finance Branch.

Student Achievement

The student must meet the established achievement criteria for a specified course to qualify for **CEU** funding. Student credits do not directly relate to **Credit Enrolment Units** (**CEU**). The funding relationship of **CEUs** to courses is as follows:

1 credit courses = 1 **CEU**; 3 credit courses = 2.5 **CEUs**; 5 credit courses = 5 **CEUs**

CEU funding rates can be found in the Rates Tables in Part 9 of this manual.

Challenge Assessment
An assessment of a student to determine if they already possess the knowledge, skills and attitudes for a course as identified in the *Programs of Study* in order to receive credit and a final mark in the course.

Charter Board
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
A **school** established under section 32 of the *School Act* and operated per section 34 of the *School Act*. The following **charter schools** have been approved for this **school year**:

- Almadina School Society (6021)
- Aurora School Ltd. (6020)
- Boyle Street Education Centre (6017)
- Calgary Arts Academy Society (0151)
- Calgary Girls' School Society (0152)
- CAPE – Centre for Academic and Personal Excellence Institute (6019)
- Connect Charter School Society (0045)
- Foundations for the Future Charter Academy Charter School Society (0009)
- Mother Earth's Children's Charter School Society (0154)
- New Horizons Charter School Society (6015)
- Suzuki Charter School Society (0012)
- Valhalla School Foundation (0224)
- Westmount Charter School Society (0109)

Child with a Disability/Delay
A **funded child** who is assessed and identified as having a mild, moderate or severe disability/delay as defined in the *Special Education Coding Criteria*.

Child with a Mild/Moderate Disability/Delay
A **funded child** who is assessed and identified as having a mild/moderate disability/delay, as defined in the *Special Education Coding Criteria*.

Child with a Severe Disability/Delay
A **funded child** who is assessed and identified as having a severe disability/delay as defined in the *Special Education Coding Criteria*.

Child with Special Education Needs
A **funded child** who is assessed and identified as having a mild, moderate or severe disability/delay or who is gifted and talented as defined in the *Special Education Coding Criteria*.

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

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

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

Declaration of Management

Form 18AE1.2c is for Superintendents and Secretary Treasurers of **school jurisdictions** to certify that the management controls related to the submission of **Credit Enrolment Unit (CEU)** information has been reviewed and approved on an annual basis.

Density

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

Designated School

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

Designated Special Education ECS Programs

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

School Jurisdictions	Schools
Black Gold Regional Division No. 18 (2245)	– East Elementary School (3214) – Ecole Bellevue School (3201)
Calgary School District No. 19 (3030)	– James Short Memorial School (9364)
Edmonton School District No. 7 (3020)	– Amiskwaciy Academy (0484) – Beacon Heights School (7106) – Elmwood School (7204) – Evansdale School (7215) – Hazeldean School (7132) – Hillview School (7255) – John Barnett School (7240) – Mayfield School (7209) – Scott Robertson School (7171) – Tevie Millar Heritage School Program (7772) – Duggan School (7189)
Elk Island Public Schools Regional Division No. 14 (2195)	– REACH Program
Grande Prairie School District No. 2357 (3240)	– Crystal Park School (1150)
Greater St. Albert Roman Catholic Separate School District No. 734 (4077)	– Vital Grandin Catholic School (2578)
Medicine Hat School District No. 76 (3050)	– Elm Street School (6848) – Herald School (6849) – Dr. Ken Sauer School (2142)
Northern Lights School Division No. 69 (1245)	– Vera M. Welsh Elementary School (2704)
Parkland School Division No. 70 (2305)	– Ecole Broxton Park School (2228)
Wetaskiwin Regional Division No. 11 (2115)	– Wetaskiwin Early Ed. Centre (WEEC)

Designated Special Education ECS Programs (Private ECS Operators)

School authority	Schools
Aspire Special Needs Resource Centre (0106)	- Aspire Special Needs Resource Centre (0289)
Calgary Quest Children's Society (9795)	- Calgary Quest School (5398)
Cause and Effect Foundation (9951)	- Cause and Effect Early Intervention Services (0274)
Community Options – A Society for Children and Families (9842)	- Community Preschool Education (0151)
Connect Society-Deafness, Education, Advocacy & Family (9522)	- Connect Society's Early Childhood Services (0658)
Department of Communication Sciences and Disorders (0128)	- Corbett Hall Early Education Program (1032)
Elves Special Needs Society (9263)	- Elves Child Development Centre (0655)
G.R.I.T. (Getting Ready for Inclusion Today) Calgary Society (9376)	- Getting Ready For Inclusion To (0284)
Getting Ready for Inclusion Today (The GRIT Program) Society of Edmonton (9887)	- Grit Program (0136)
New Heights School and Learning Services Society (0077)	- New Heights School and Learning Services (0432)
Pacekids Society for Kids with Special Needs (9414)	- Pacekids Programs South (0302)
Providence Child Development Centre (9827)	- Providence Children's Centre (0135) - Providence Children's Centre – Beddington (1251) - Providence Children's Centre – Falconridge (1216) - Providence Children's Centre – Hawkwood (1432) - Providence Children's Centre – McKenzie Towne (1591) - Providence Children's Centre – Midnapore (1385)
Renfrew Educational Services (9672)	- Renfrew Educational Services – Janice McTighe Centre (0249) - Renfrew – Thomas W. Buchanan Centre (0250) - Renfrew Educational Services – Child Development Centre (0280) - Renfrew Educational Services – Park Place Centre (0281) - Renfrew Educational Services – Bowness Centre (0437)
Society for Treatment of Autism (Calgary Region) (9879)	- Society for Treatment of Autism (0212)
The Heartland Agency (9375)	- The Heartland Agency (0285)
The PREP Program – A Calgary Society to Promote Education for Individuals with Down Syndrome (9894)	- The PREP Program (0230)

Designated Special Education Private School (DSEPS)

An **accredited funded private school** that has been given special approval and funding by the **Minister**, where the sole purpose of the **school** is to serve students who are identified with a mild, moderate, or severe disability. The educational programs provided to the students require modifications or adaptations to the *Programs of Study*, and are specified in the **Individualized Program Plan (IPP)** or **Instructional Support Plan (ISP)** developed and implemented for each student. The following DSEPS are approved for the **school year**, based on an approved Annual Operating Plan:

School authority	Schools
Calgary Academy Society (9131)	Calgary Academy (9908)
Calgary Quest Children's Society (9795)	Calgary Quest School (5398)
Edmonton Academy Society for Learning Disabled (9172)	Edmonton Academy (7953)
Elves Special Needs Society (9263)	Elves Child Development Centre (0655) Elves Child Development Centre (2166)
Foothills Academy Society (9107)	Foothills Academy (9917)
Janus Academy Society (0025)	Janus Academy (0032) Janus Academy (Holy Cross Site) (1323)
New Heights School and Learning Services Society (0077)	New Heights School and Learning Services (0432)
Parkland Community Living and Supports Society (9027)	Parkland School Special Education (4493)
Renfrew Educational Services Society (9672)	Renfrew Educational Services – Janice McTighe Centre (0249) Renfrew – Thomas W. Buchanan Centre (0250)
Rundle College Society (9230)	Rundle College Academy (5297)
Third Academy International Ltd. (0023)	The Third Academy (0031) Third Academy Calgary South (1446)

Developmentally Immature (Code 10)

A **funded child** who:

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

Distance

Refers to the **eligible transportation distance** from where each **eligible passenger** resides to their **designated school** or **school** of choice, whichever is closest.

Division

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

Dual Credit

Programming authorized and funded by Alberta Education in which grade 10, 11, or 12 students can earn both high school credits and credits that count toward a post-secondary certificate, diploma, or degree, including a journeyperson certificate. A **dual credit** course can be categorized as either **single enrolled** or **dual enrolled** for funding purposes.

Dual Enrolled

A **dual credit** course that is instructed and/or supervised by both a post-secondary instructor and an Alberta Certificated teacher. Students may receive credits on both their high school and post-secondary transcripts if all assessment requirements are met under the Guide to Education: ECS to Grade 12 (for high school credit) and under the post-secondary controlled assessment process (for post-secondary credit).

Early Childhood Services (ECS) Operator

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

Early Childhood Services (ECS) Program

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

ECS Home Program

An **ECS program** (**kindergarten**) delivered by an **ECS operator** in the home of a **kindergarten** 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 programming**.

Education Services Agreement

An agreement entered into by a **board** under section 62(1)(b) of the *School Act* to have another party educate one of 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

This is the total area in square miles in a **school jurisdiction** including:

1. any township in which a portion of the township is privately owned; and
2. two square miles per mile of road corridor through vacant townships between populated areas, but excluding:
   a. unpopulated Crown land, military reserves, grazing leases, provincial parks and large bodies of water;
   b. townships where two or more adjacent townships have vacant land which is at least the size of a township;
   c. outlying townships within the jurisdiction boundary where the **school jurisdiction** provides no transportation service;
   d. city, town, village or hamlet with a population greater than 10,000; and
   e. for purposes of Rural Transportation Funding, the portion for transportation services provided by another **school jurisdiction** under a **transportation agreement**.

Eligible Passenger

For purposes of Student Transportation Funding, this refers to an individual who resides at least 2.4 kilometers from both their **designated school** and if applicable, their attending **school** of choice and is transported under section 51 of the *School Act* and the *School Transportation Regulation* or required to be transported to and from **school** under section 51 of the *School Act* and the *School Transportation Regulation* and is enrolled in a **school** of the **board**, as follows:

1. 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 **school authority** 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** with which the **school jurisdiction** adjacent to the **unorganized territory** has an existing **transportation agreement**.

Eligible Transportation Distance

The **distance** the **eligible passenger** resides from their **designated school**. It is the one-way **distance** from the boundary at the roadway access to the residence nearest to the **school** of the quarter section or lot which the residence of the **eligible passenger** is situated to the **designated school** in kilometers on a traveled road or public right of way on any part of which the public is ordinarily entitled to walk 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

A **funded child** who resides at least 2.4 kilometers from the **ECS program** who is transported to the **ECS program**.

Expected Eligible Passenger

In the Metro Urban Transportation section, this is the number of **funded students** and **funded children** calculated on the basis of enrolment and a number of factors which affect eligibility for transportation.

Family-Oriented Programming

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

First Nations Child/Student who Reside on a Reserve

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

First Nation Education Authority

A legal entity delegated by Chief and Council to operate and administer First Nation **schools** on reserve.

Framework Agreement (First Nations)

A signed agreement between First Nation(s) and the Government of Alberta for the establishment of a **First Nation Education Authority**.

Francisation

Targeted instructional supports for eligible children and students registered in a **Francophone Education Program** offered by a **Francophone Regional Authority** to assist them in developing French language competencies that will allow them to fully integrate socially, academically and culturally into the community and into Canadian Society as a Francophone.

Francophone Education Program

A program operated by a **Francophone Regional Authority** under section 10 of the *School Act*.

Francophone Regional Authority

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

French as a Second Language (FSL)

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

Francophone Education

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

Frozen Funded Head Count

This is an extract taken from Funding Events System (FES) on the last business day of February of the number of **funded children/students** enrolled on the **September count date**.

FTE

Full-time Equivalent.

FTE Equity of Opportunity Enrolment

- a **funded child** counts as 0.5 **FTE**
- a **funded student** counts as 1.0 **FTE**
- excludes **funded students** in **accredited funded private school**s, **private ECS operators**, Home Education programs, **online programs** (Code 620), institutional programs (Code 550) and Hutterite colony schools (see section 1.14, Equity of Opportunity funding).

FTE Funded Child(ren)/student(s)

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

FTE Funded Enrolment

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

FTE Remote Rural Enrolment

Funded children/students receiving an education program in **schools** located in population centres of less than 5,000 people (see section 1.14, Equity of Opportunity funding).

Funded Child

An individual who meets conditions 1, 2, 3, and 4 unless 5, 6, 7 or 8 apply:

1. is attending an **ECS program** on the **September count date** of the current **school year** operated by a **school authority** or is covered by an **education services agreement** under section 62 (1)(b) of the *School Act* that has been approved for funding by the School Finance Branch;
2. meets the minimum age requirements as set out in the following table*:

Category of Funded ECS Children	*Type of ECS Funding Provided	*Minimum age of the child on September 1 must be: (Born on or before March 1)
Kindergarten child	Base Instruction Funding (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 Funding and Mild/Moderate (Maximum 2 years funding which includes the **Kindergarten** year)	3 years 6 months
ECS child with English as a Second Language (ESL) needs or **Francisation** needs	Base Instruction Funding (Maximum 2 years funding which includes the **Kindergarten** year) ESL/**Francisation** Funding	3 years 6 months
ECS child with severe disabilities/delay	Base Instruction Funding and PUF(Maximum 3 years funding which includes the **Kindergarten** year)	2 years 8 months
ECS child who is **developmentally immature**	Base Instruction Funding (Maximum 2 years funding)	5 years 6 months

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

3. Is a resident of Alberta and has a **parent** who ordinarily resides in Alberta on the **September count date**;

4. Is a Canadian citizen on the **September count date**; or

   a. is lawfully admitted to Canada for permanent residence; or

   b. is a child of a Canadian citizen; or

   c. is a child of an individual who is lawfully admitted to Canada as a permanent or **temporary resident**; or

   d. is a step-child (who has been issued a study permit) of a temporary foreign worker that is in Canada on a work permit; and who is the biological or adopted child of the temporary foreign worker's spouse or partner; or

   e. is a step-child of a Canadian citizen and is the biological or adopted child of the Canadian citizen's non-Canadian spouse or partner. The following documentation is required:

      i. proof of application for permanent resident status and fee payment to Immigration, Refugees and Citizenship Canada (IRCC); or

      ii. valid study permit for the child.

5. For funding purposes, a **First Nations child who resides on a reserve** is not counted as a **funded child**.

6. An individual who is **developmentally immature** (code 10).

7. 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** if the **school jurisdiction**, the **ECS operator** and the **parent** agree that an **ECS program** is the most appropriate placement, and the child has had less than the maximum years of funding for which they are eligible.

8. An individual who is at least 6 years of age, but less than 7 years old on September 1 may be counted as a **funded child** if they are enrolled in an **ECS program** and are either **developmentally immature** or are entering an **ECS program** for the first time. Any other situations involving registering an overage child require special approval from the School Finance Branch.

Funded Student

An individual who meets conditions 1, 2, 3, and 4, unless 5, 6 or 7 apply:

1. Is attending a school or a **shared responsibility program** in Grades 1 to 12 on the **September count date** of the current **school year**;

   a. operated by a **school jurisdiction** or the governing body of an **accredited funded private school**; or

   b. is the subject of an agreement under section 62 (1)(b) of the *School Act* entered into by the student's **resident board** that has been approved for funding by the School Finance Branch; or

   c. in another province or country under a **reciprocal exchange program** approved by Alberta Education with a student from that respective province or country.

2. Is at an age on September 1 in the **school year** in which he/she is counted, as follows:

   a. at least 5 years 6 months of age and is eligible to enter Grade 1 according to the school entrance age policy of the **school authority** that enrolls the student, but less than 20 years old; or

   b. less than 5 years 6 months of age, is enrolled in Grade 1, and has previously attended an **Early Childhood Services (ECS) program** outside of Alberta that meets the learner expectations of the **Kindergarten** Program Statement; or

   c. 6 years but less than 7 years of age and who has a mild, moderate or severe disability/delay and requires another year of ECS.

3. Is a Canadian citizen on the **September count date**; or

   a. is lawfully admitted to Canada for permanent residence; or

   b. is a child of a Canadian citizen; or

c. is a child of an individual who is lawfully admitted to Canada as a permanent or **temporary resident**; or

d. is a step-child (who has been issued a study permit) of a temporary foreign worker that is in Canada on a work permit; and who is the biological or adopted child of the temporary foreign worker's spouse or partner; or

e. is a step-child of a Canadian citizen and is the biological or adopted child of the Canadian citizen's non-Canadian spouse or partner. The following documentation is required:

i. proof of application for permanent resident status and fee payment to Immigration, Refugees and Citizenship Canada (IRCC); or

ii. valid study permit for the student.

4. Is a resident of Alberta and has a **parent** who ordinarily resides in Alberta on the **September count date**; or

a. is an **independent student** who is between 16 years of age and less than 18 years of age who resides in Alberta and has a **parent** that resides in Canada; or

b. is an **independent student** who is between 18 years of age and less than 20 years of age and who resides in Alberta.

5. For funding purposes, a **First Nations student who resides on a reserve** is not counted as a **funded student**.

6. For funding purposes, a **home education student** is not counted as a **funded student**.

7. For funding purposes within the Base Instruction Formula (section 1.2 and section 3.1), **FTE**'s for students in a **shared responsibility program** are counted at the percentage of the school program.

Group Home

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

High School Base Rate

A funding rate used for high school students who are block funded at the equivalent of 35 Tier 1 **CEUs**, such as **students with special needs**, students in an **Institution** (code 550), and high school **refugee students** (code 640).

Highway

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

Home Education Student

A **funded student** who:

1. meets the requirements of the *Home Education Regulation*; and

2. is enrolled and under the supervision of a **school jurisdiction** (except **charter schools**) or an **accredited funded private school** and has a **parent** who resides in Alberta on the **September count date**; and

3. is at least 5 years and 6 months or older and eligible to enter Grade 1 according to the school entrance age policy of the **school jurisdiction**, but less than 20 years of age on September 1 in the **school year** in which he/she is counted.

Independent Student

A **funded student** who is:

1. at least 18 years of age but less than 20 years of age on September 1; or
2. at least 16 years of age but less than 18 years of age on September 1; and who is:
   a. living independently; or
   b. a party to an agreement under section 57.2 of the *Child, Youth and Family Enhancement Act*

Individualized Program Plan (IPP) or Instructional Support Plan (ISP)

A statement of intentions developed to address the child/student's learning needs. These plans focus on instructional planning and academic learning. The plan identifies the instructional strategies and supports the child/student requires to achieve the outcomes in the IPP or ISP. Information gathered about the student, including specialized assessment should be used to assist in the development of the IPP or ISP. An IPP/ISP is mandatory for all children/students identified as having special education needs, including mild, moderate and severe disabilities/delays and those who are gifted and talented.

In the Custody of a Director

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

Institution

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

School authorities Approved to Provide an Educational Program in an Institution (EPI) for this **school year**	
School authority	**Schools**
Aspen View Public School Division No. 78 (2125)	- Night Wind, Kihew House School (1920)
Battle River Regional Division No. 31 (2285)	- Camrose Women's Shelter (4554)

Calgary School District No. 19 (3030)	- Adolescent Day Treatment Program (1749)
	- Dr. Gordon Townsend School (9886)
	- West View School (9687)
	  - Enviros Base Camp (9687)
	  - ExCel Discovery Program (9687)
	  - Youth Attendance Centre (9687)
	- William Roper Hull School (9033)
	- Women's Emergency Shelter (no code)
	- Young Adult Program (9512)

Chinook's Edge School Division No. 73 (0053)	- Equinox Group Home (1453) - Grimmon House (1058)
Edmonton Catholic Separate School District No. 7 (0110)	- Alberta Health Services Intensive Day Treatment Youth Program (1576) - Alberta Health Services Youth Residential Treatment Centre (1174)

Edmonton School District No. 7 (3020)	- Hospital School Campuses (7701)
	  - Glenrose School (7701)
	  - Royal Alexandra School (7701)
	  - Stollery School (7701)
	- Institutional Service Schools (7706)
	  - Attendance Centre (7706)
	  - CASA House School (7706)
	  - Highwood School (7706)
	  - Howard House School (7706)
	  - Kennedale School (7706)
	  - Rite Trak School (7706)
	  - Yellowhead School (7706)
	- Rosecrest School (7729)
	- WIN House

Elk Island Public Schools Regional Division No. 14 (2195)	- A Safe Place (3343) - Elk Island Youth Ranch Learning Centre (1599)
Holy Family Catholic Regional Division No. 37 (0021)	- St. Francis Holistic Learning Centre (1619)
Lakeland Roman Catholic Separate School District No. 150 (4105)	- Dr. Margaret Savage Centre School (2916)
Lethbridge School District No. 51 (3040)	- Harbour House School (6459) - Lethbridge Regional Hospital School (6453) - Pitawani School (6456) - Stafford Ridge School (1380)
Medicine Hat School District No. 76 (3050)	- PAS (6864)
Northern Lights School Division No. 69 (1245)	- Youth Assessment Centre (2716)
Parkland School Division No. 70 (2305)	- Bright Bank Academy (1321)
Peace Wapiti School Division No. 76 (0177)	- Horizon Group Care (1055)
Red Deer Public School District No. 104 (3070)	- Direwood Treatment Centre (4461) - Oskayak Treatment Centre (4469) - Parkland Youth Homes (4464) - Red Deer Regional Hospital Education Program (0574) - Youth Assessment Centre (4457)
St. Paul Education Regional Division No. 1 (2185)	- Columbus House of Hope (1741)
Sturgeon School Division No. 24 (1110)	- Oak Hill School (2509)
Unlimited Potential Community Services Society (9272)	- Columbus Academy (0577) - Phoenix Academy (0028) - Thomas More Academy (0483)
Wild Rose School Division No. 66 (1325)	- Kootenay School (4111)
Wolf Creek School Division No. 72 (0054)	- Wolf Creek Education Centre (4299)

Institutional Students

Resident students of government who attend an education program in an **institution** (EPI) or **day students** attending an educational program in an **institution** that is approved for **day students**.

NEW

Kindergarten

Refers to the ECS year immediately prior to grade one.

Levels of Support

Refers to the types of supports and services being provided to **students with a severe disability** in a **charter school** or an **accredited funded private school**. These students 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 (e.g., behaviour specialist, orientation/mobility specialist).

March Count Date

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

The submission date for this count will be the third instructional day after the **March count date**. **School authorities** should keep their student enrolment data updated regularly and verifying it prior to submission of the March count.

Minister

Refers to the **Minister** of Education.

Online Program

REVISED

An education program offered by a **school authority** and delivered electronically to a student under the instruction and supervision of a certificated teacher of a **board** or **accredited funded private school**. The planning and implementation of instruction as well as the assessment of student learning in relation to the outcomes from the Alberta programs of study, is the responsibility of Alberta certificated teachers employed by the **school authority**. 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. ECS children cannot be enrolled in online programs.

Operating Day

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

Other Language Programs

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

Outreach Program

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

Parent

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

Private Early Childhood Services (ECS) Operator

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

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

Private School

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

Reciprocal Exchange Program

A recognized exchange program where an Alberta **resident student** attends a **school** in another province or country and changes place with a student from that province or country. The student from the other province or country must attend the Alberta student's resident **school authority** either in the same **school year** or in the subsequent **school year**. The reciprocal exchange must be approved by the International Education Services Branch of Alberta Education.

Refugee Student

A **funded child/funded student** who was born outside of Canada and has entered Canada as a refugee as defined in the Immigration and Refugee Protection Act as someone who has been forced to flee their country due to persecution. These students will require significant additional supports and services to deal with issues such as limited or disrupted formal schooling, traumatic events and adjusting to an unfamiliar culture.

An eligible student must provide the **school authority** with current documentation from Immigration, Refugee and Citizenship Canada substantiating the student's refugee status/claim. For funding purposes, this documentation must include the date of entering Canada as a refugee or the date a claim was made for refugee protection.

To receive Inclusive Education funding for **refugee students**, students must be coded as 640 (see Section 1.10). **Refugee students** will be funded for a maximum of 5 years. In addition to the Inclusive Education funding, **refugee students** in high school will be funded at the high school base rate (see Section 1.2).

Resident Board

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

Resident Student

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

Resident Student of the Government

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

Route Distance

A term used in conjunction with student 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/ most direct route;
2. the **distance** from the point of the first afternoon pick-up by to the point of the last afternoon drop-off and back to the point of the first afternoon pick-up by the shortest/most direct route; and
3. the **distance** travelled on a **highway** by a vehicle transporting **eligible passengers** to and from school, or on a feeder route, on an operating day or by a vehicle transporting **eligible passengers** on a weekend between their places of residence and their boarding places or **schools** where both places are in the same district or division.

School
A structured education environment through which an education program is offered to a student by a **board**; a **charter school**; a **private school**; a private **Early Childhood Services (ECS) operator**; a **parent** providing a home education program; or the **Minister**.

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

School Authorities
For purposes of this manual includes **school jurisdictions**, **accredited funded private schools**, and **private ECS operators**.

School Board
The board of trustees of a **school jurisdiction** (excluding **Charter schools**).

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

School Bus
A motor vehicle that:

1. is owned, leased or contracted by a **school authority**;
2. is used for the transportation of **eligible passengers**;
3. has a passenger **seating capacity** of 12 or more; and
4. a Type I, Type II, Type III or Type IV **school bus** as described in the CSA Standard D 250-M 2001 as amended or replaced from time to time as issued by the Canadian Standards Association.

School Jurisdiction
For funding purposes this is an Alberta school district, **school division**, regional division, **Francophone Regional Authority**, **charter school**, the Lloydminster Public School division, or the Lloydminster Roman Catholic Separate School Division.

Schools of Choice
Refers to **school**s that are chosen because of the type of program being offered. Such as, Outreach schools, Hockey/Dance schools, Home Education schools, Religious Education schools, Online schools, Hutterite Colony schools, Language/Cultural schools, **designated special education private school**s, and Language 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*.

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

The submission date for this count will be the third instructional day after the **September count date**. **School authorities** should keep their student enrolment data updated regularly verifying it prior to submission of the September count.

REVISED Shared Responsibility Program

An educational program consisting of two distinct parts including a parent providing a home education program to the student and an Alberta funded **school authority** who agrees to share responsibility for the student's education. Two conditions must be met to qualify as a **shared responsibility program**:

1. The **school authority** portion of the agreement must consist of a program where an Alberta certificated teacher, employed by a **school board** or an **accredited funded private school**, is responsible for planning, resource selection, instruction, assessment and evaluation of student progress in selected courses that follow the Alberta Programs of Study or locally developed courses. The **school authority** is responsible for meeting the following minimum requirements:
   - Grade 1 – 9 Minimum of 50 per cent school provided program
   - Grade 10 – 12 Minimum of 20 per cent school provided program
2. The home education portion of the agreement must consist of a program provided by a parent under the authority of the *School Act* and the *Home Education Regulation*. The parent is responsible for developing, administering and managing the home education program. The **school authority** is responsible for supervising the home education program.

Single Enrolled

A **dual credit** course that is typically instructed by an Alberta certificated teacher who has the credentials to teach the course. Single enrolled courses are generally Career & Technology Studies (CTS) Apprenticeship Pathways courses. Students will receive the appropriate CTS courses on their high school transcripts. Students may also receive credits, exam eligibility, or advanced standing at a post-secondary level.

Student(s) with a Disability

A **funded student** who has been assessed and identified as having a mild, moderate or severe disability as defined in the *Special Education Coding Criteria*.

Student with a Mild/Moderate Disability

A **funded student** who has been assessed and identified as having a mild/moderate disability as defined in the *Special Education Coding Criteria*.

Student/Child with a Severe Disability

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

Student with Special Education Needs

A **funded student** with special education needs is one who is assessed and identified with a mild, moderate or severe disability or who is gifted and talented, as defined in the *Special Education Coding Criteria*. It is mandatory for any student with special education programming to have an **Individual Program Plan (IPP) or Instructional Support Plan (ISP)**. The IPP/ISP is intended to create meaningful and successful learning opportunities that use the programs of study as a starting point of instruction.

Temporary Resident

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

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

See also the definition of a **Funded child/student** in the Glossary.

If the **parent** does not qualify as a **temporary resident**, the **parent** may be required to pay tuition fees for their child at the discretion of the **school board** (see section 49 of the *School Act*). Non-Canadian students of school age who are in Canada on a study permit that do not meet the definition of a **funded child/student** 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.

Three Year Enhancement Allocation Plan (First Nations)

A three-year plan submitted by a **First Nation Education Authority** as a requirement to access **First Nation Framework Agreement** Enhancement Funding. The plan must identify outcomes, strategies, deliverables and is reviewed and approved by Alberta Education prior to allocation of funding.

Transportation Agreement

An agreement between two **school authorities** where one **school authority** agrees to transport children/students of the other authority who qualify for transportation funding as an **eligible passenger** or as an **eligible transported ECS child**. Signed agreements must be in place and on file by October 31.

Unorganized Territory

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

Weighting Factor

A term used in conjunction with urban and rural transportation funding where:

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 rural **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 **child/student with a severe disability** is multiplied by a factor of 1.50;
5. each **eligible passenger** who requires a wheelchair is multiplied by a factor of 8.0;
6. the **weighting factor** does not apply to **eligible passengers** that are transported by transit.