

Funding Manual for School Authorities 2019/20 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	

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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 2019/20 School Year

This manual is issued under authority of the following:

- *Education Act, Statutes of Alberta, 2012, Chapter E-0.3*
- *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



October 24, 2019

Message from the Deputy Minister

I am pleased to provide you with Alberta Education's *Funding Manual for School Authorities* for the 2019/20 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 2019/20 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 2019/20. 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 2019/20 School Year

The following are the significant content changes made to the 2019/20 *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.

The 2019/20 *Funding Manual for School Authorities* reflects the proclamation of the *Education Act*. The *Education Act* specifies goals for Alberta’s Early Childhood Services to Grade 12 (ECS-12) education system and identifies the roles and responsibilities of the Ministry, school boards, charter schools, private schools, teachers, parents and students.

Funding Allocation Changes

- The following allocations have been repurposed effective September 1, 2019:
 - Class Size (School Jurisdictions) – former sections 1.1, 1.2 and 6.4
 - School Fees – former section 6.6
 - School Transportation Fees – former section 6.7
 - Classroom Improvement Fund (CIF) – former section 6.9

Section 1.3 – One-Time Transition Funding has been added for **school jurisdictions** only.

Section 9.1 – School Jurisdiction Funding Rates

- For the 2019/20 school year, all funding rates remain the same as for 2018/19 with the exception of the following repurposed funding:
 - Class Size (including Tiers 2 and 3 Credit Enrolment Unit funding),
 - School Fees,
 - School Transportation Fees,
 - Classroom Improvement Fund (CIF);and added funding:
 - One-Time Transition.

Section 9.2 – Private ECS Operators Funding Rates

- For the 2019/20 school year, all funding rates remain the same as for 2018/19.

Section 9.3 – Accredited Funded Private Schools Funding Rates

- For the 2019/20 school year, all funding rates remain the same as for 2018/19.

Other Changes

Introduction – General Conditions – Instructions to school authorities regarding annual and accumulated deficits have been updated on page 9.

Section 1.24 – School jurisdictions are prohibited from charging student transportation fees for resident **students with disabilities** who cannot use regular transportation services.

Section 1.26 - ECS operators are prohibited from charging student transportation fees for ECS **children with disabilities** who cannot use regular transportation services.

Section 3.2 - Designated Special Education Private Schools (DSEPS) are no longer required to notify resident boards, in writing, of the board's resident students who are registered at the DSEPS. Resident boards and DSEPS are now able to access these student lists using the Funding Event System (FES).

Forms

To improve accessibility to funding manual forms online, a new SharePoint site has been created which can be accessed by signing into the Alberta Education website.

- The submission of the Declaration of Management form is no longer required.
- A Resident Board Consultation form has been added which boards and parents can use to capture the required information to support a transfer of a student to a Designated Special Education Private School (DSEPS).
- Program Unit Funding (PUF) Budget/Actual forms have been updated and must be used in the submission process.
- Capitalized Infrastructure Maintenance and Renewal (IMR) Expenditure forms have been updated.

Glossary of Terms – 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 mild/moderate disability delay, gifted and talented and English as a Second Language (ESL) or Francisation needs has been changed from 3 years 6 months to 3 years 8 months.

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** remain responsible for the educational program of their **resident student** to whom the agreement applies as per Section 11 of the *Education 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 18(1) and 11 of the *Education 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 child/funded student**;
 - 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 subsequently 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 children and students.

REVISED

14. **Accumulated Deficit from Operations (ADO)****For school boards and charters only:**

- a. School boards are prohibited from budgeting or incurring an **accumulated operating deficit (ADO)**. A budgeted **annual operating deficit** is acceptable if sufficient **accumulated surplus from operations (ASO)** is available to cover the planned shortfall. **School jurisdictions** must include changes to projected **ASO** balances, with sufficient variance explanations, in their monthly financial reporting information to Alberta Education. If sufficient

ASO is not available to cover a projected shortfall, jurisdictions must make spending adjustments equivalent to the **ADO** prior to the end of the current school year and reflect these adjustments via monthly reporting submissions to Alberta Education.

- b. November 30 is the deadline for **school jurisdictions** to submit Audited Financial Statements (AFS) for the previous **school year** and a Fall Budget Update for the current school year. A **school jurisdiction** submitting an AFS with an **accumulated deficit from operations (ADO)** will be expected to eliminate the **ADO** by the end of the current school year by making spending adjustments equivalent to the **ADO** and reflect these adjustments via monthly reporting submissions to Alberta Education.

For private schools and private ECS operators:

- c. 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.
 - d. 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 years in accordance with an **ADO** Elimination Plan approved by the Executive Director, Strategic Financial Services.
15. A **school authority** may be subject to an investigation under Section 70 of the *Education Act*. A **school jurisdiction** may be subject to the appointment of an official trustee under Section 72 of the *Education 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

Is provided on a per student basis for every full-time equivalent (**FTE**) student from early childhood services (ECS) to Grade 9. For students in Grades 10 – 12, base instruction funding is provided based on credit enrolment units (**CEUs**).

2. Additional Funding for Differential Factors

- 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, Innovation in First Nations Education (IFNE), SuperNet service, School Nutrition Programs and Dual Credit Programming.

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, accredited 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.

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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)
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ALLOCATION CRITERIA

1. Access to a minimum of 475 hours of ECS instruction must be provided for each child during a school year. Modifications regarding the provision of 475 hours of instruction 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 21(1) of the *Education 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 8 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

$$\begin{array}{l} \text{\# of funded students in} \\ \text{Grades 1 – 9} \end{array} \times \left(\begin{array}{l} \text{applicable grade level base instruction rate} \end{array} \right)$$

2. Grades 10 – 12

a. # of Tier 1,2 & 3 CEUs for funded students	X	Tier 1 CEU Rate
Plus,		
b. # of Tier 4 CEUs for funded students	X	Tier 4 CEU Rate
Plus,		
c. # of Tier 5 CEUs ** for funded students	X	Tier 5 CEU Rate
Plus,		
d. # of funded students who are special needs or coded 550 or 640	X	High School Base Rate
Plus,		
e. # of CEUs for ADLC courses	X	44% of the Tier 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 6b. and 6c. 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. 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.
5. 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.
 - 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
 - c. **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)
 - 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 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 1.7). 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 course 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 5 (j) of this section); and
 - iv. students on a one-year **reciprocal exchange program**.
- 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.
- 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 awarded 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. **Dual enrolled dual credit** tier rate funding per CEU is available to all **school authorities** for authorized **dual enrolled dual credit** courses. Top-up funding 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**.
- i. where a school authority has a formal partnership agreement with an eligible post-secondary institution
 - ii. **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.

- iii. 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.
 - iv. 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.
 - v. Funding for **dual enrolled dual credit** courses will be provided after each term.
 - vi. **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 per CEU for **dual enrolled dual credit** courses. The top-up amount is determined by taking the difference between the Tier 5 rate and the Tier 1 rate. This top up funding will be accessed through the same process of submitting course information through PASIprep as identified in the prior bullet points.
6. 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 course 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 sequence to another course sequence 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. 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.
 - d. 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**.
 - e. 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 7 b.).
 - f. For all courses, **schools** must maintain course outlines, detailed assessment records of student work in the course, records of student withdrawal, attendance records and final marks for seven years.
 - g. 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) per grade level.
 - 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 and retained by the school as a record of student work.
 - h. 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 for Work Experience and/or Workplace Practicum courses.
7. 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 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. For the 2019/20 school year, an INC status may be used in place of a grade below 50 per cent when a student does not withdraw from a CTS course yet has not achieved all the learning outcomes identified in the Programs of Study. An incomplete status has no associated mark(s).
8. **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. courses were not authorized for the school authority;
 - iii. a **school** that has been assessed a penalty previously, continues to be non-compliant; or
 - iv. 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 November 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 2017/18 audited financial statements. For the 2019/20 **school year**, the total deduction will be recovered from the monthly payments from November 2019 to March 2020.

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

NEW

Section 1.3 — One – Time Transition Funding

ALLOCATION FORMULA

$$\text{One - Time Transition Allocation} = \text{FTE Funded Enrolment} \times \text{Applicable Metro/Urban or Rural rate}$$

ALLOCATION CRITERIA

For the purposes of this grant:

Urban: A **jurisdiction** containing a population centre of greater than 30,000 people within its boundaries.

Rural: A **jurisdiction** containing no population centre of greater than 30,000 people within its boundaries.

School Jurisdiction	GeoType
Almadina School Society	Charter
Aurora School Ltd.	Charter
Boyle Street Education Centre	Charter
Calgary Arts Academy Society	Charter
Calgary Girls' School Society	Charter
CAPE – Centre for Academic and Personal Excellence Institute	Charter
Connect Charter School Society	Charter
Foundations for the Future Charter Academy Charter School Society	Charter
Lloydminster Public School Division	Urban
Lloydminster Roman Catholic Separate School Division	Urban
Mother Earth's Children's Charter School Society	Charter
New Horizons Charter School Society	Charter
Suzuki Charter School Society	Charter
The Aspen View School Division	Rural
The Battle River School Division	Rural
The Black Gold School Division	Urban
The Buffalo Trail School Division	Rural
The Calgary Roman Catholic Separate School Division	Metro
The Calgary School Division	Metro
The Canadian Rockies School Division	Rural
The Chinook's Edge School Division	Rural
The Christ the Redeemer Catholic Separate School Division	Rural
The Clearview School Division	Rural
The East Central Alberta Catholic Separate School Division	Rural
The East Central Francophone Education Region	Francophone
The Edmonton Catholic Separate School Division	Metro
The Edmonton School Division	Metro
The Elk Island Catholic Separate School Division	Urban
The Elk Island School Division	Urban
The Evergreen Catholic Separate School Division	Urban
The Foothills School Division	Rural
The Fort McMurray Roman Catholic Separate School Division	Urban
The Fort McMurray School Division	Urban

School Jurisdiction	GeoType
The Fort Vermilion School Division	Rural
The Golden Hills School Division	Rural
The Grande Prairie Roman Catholic Separate School Division	Urban
The Grande Prairie School Division	Urban
The Grande Yellowhead School Division	Rural
The Grasslands School Division	Rural
The Greater North Central Francophone Education Region	Francophone
The Greater St. Albert Roman Catholic Separate School Division	Urban
The High Prairie School Division	Rural
The Holy Family Catholic Separate School Division	Rural
The Holy Spirit Roman Catholic Separate School Division	Urban
The Horizon School Division	Rural
The Lakeland Roman Catholic Separate School Division	Rural
The Lethbridge School Division	Urban
The Living Waters Catholic Separate School Division	Rural
The Livingstone Range School Division	Rural
The Medicine Hat Roman Catholic Separate School Division	Urban
The Medicine Hat School Division	Urban
The Northern Gateway School Division	Rural
The Northern Lights School Division	Rural
The Northland School Division	Rural
The Northwest Francophone Education Region	Francophone
The Palliser School Division	Rural
The Parkland School Division	Urban
The Peace River School Division	Rural
The Peace Wapiti School Division	Rural
The Pembina Hills School Division	Rural
The Prairie Land School Division	Rural
The Prairie Rose School Division	Rural
The Red Deer Catholic Separate School Division	Urban
The Red Deer School Division	Urban
The Rocky View School Division	Urban
The Southern Francophone Education Region	Francophone
The St. Albert School Division	Urban
The St. Paul School Division	Rural
The St. Thomas Aquinas Roman Catholic Separate School Division	Urban
The Sturgeon School Division	Rural
The Westwind School Division	Rural
The Wetaskiwin School Division	Rural
The Wild Rose School Division	Rural
The Wolf Creek School Division	Rural
Valhalla School Foundation	Charter
Westmount Charter School Society	Charter

REFERENCES

[Municipal Affairs Population list](#)

Section 1.4 — 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	)		
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 19AE1.3a.
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 enrolls the student in ADL courses through the ADLC; Alberta Education will pay 50 per cent of the eligible ADL course costs combined for both **associate boards**, up to a maximum equivalent to the home education funding amount.
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](#)

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

ADDITIONAL ALLOCATIONS FOR DIFFERENTIAL COST FACTORS

Section 1.5 — Outreach Funding

ALLOCATION FORMULA

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

1. Outreach funding is subject to Alberta Education's approval of the **outreach program** by 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 1.6 — 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;

Ceiling Amount	=	# of centre hours (max. 800)	X	Rate for one program unit funded child
		800 hours		

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

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

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

- c. calculation of the ceiling amount when a child's program starts after September 30 or ends before May 25 will be the lesser of the following ceiling calculations:
- a pro-rated ceiling based on the number of months of the child's PUF program multiplied by \$2,505 per month; or
 - 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

- PUF may be paid to a **school authority** for each eligible **child with a severe disability/delay** for a maximum of three years.
- To be eligible for funding, a **child with a severe disability/delay** must be at least 2 years 8 months of age and less than 6 years of age on September 1.
- School authorities** must use the *Special Education Coding Criteria* to determine the child's eligibility and proper coding.
- 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.

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 must be completed before entering the child in PASI and 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.

Budget submission is not required for **school jurisdictions** but is required for **private ECS operators** including Designated Special Education ECS Programs (Private ECS Operators and **accredited funded private** and charter schools offering ECS).

- 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 29.
- For monitoring purposes, Alberta Education will incorporate a random review of actual PUF costs.

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 1.7 – English as a Second Language Funding (ESL)

ALLOCATION FORMULA

ESL Allocation	=	# of eligible ESL FTE funded children/students	X	ESL Rate
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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 8 months and 4 years 6 months on September 1 that are identified after the **September count date** and reported on the **March count** will be eligible for 50 per cent ECS ESL funding and 50 per cent of the ECS base instruction funding.
5. Funding is provided for a maximum of 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**, print-based distance education or **online programs** are not eligible for funding under this section

REFERENCES

[English as a Second Language \(ESL\)](#)

[Funding for Early Learners: ESL/Francisation](#)

[K-12 ESL Proficiency Benchmarks](#)

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

Section 1.8 — Francisation Funding (Francophone Regional Authorities only)

ALLOCATION FORMULA

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

1. **Francisation** funding may be claimed for **funded children/students** who 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 8 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.
5. Funding is provided for a maximum of 5 years for each **Francisation** eligible **funded child/student**. Coding for **Francisation** funded children/students should be maintained for as long as the child/student requires **Francisation** support, even after the **Francisation** funding for that **funded child/student** has been exhausted. The need for ongoing **Francisation** supports is determined by the results of a French language proficiency assessment that is administered annually.
6. **Funded students** enrolled in home education, **shared responsibility**, **outreach**, print-based distance education 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.

REFERENCES

[FrancisaFrancisation - Foire aux questions](#)

[Francisation Proficiency Benchmarks](#)

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

Section 1.9 — First Nations, Métis and Inuit (FNMI) Education Funding

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

Section 1.10— Socio-Economic Status (SES) Funding

ALLOCATION FORMULA

SES Allocation	=	Incidence Rate	X	FTE funded enrolment	X	SES Rate
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- 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:
 - average number of years of education of mothers in families with children;
 - per cent of families, with children, headed by a lone **parent**;
 - per cent of families, with children, who own their dwelling;
 - average income of families with children;
 - per cent of **parents**, with children, who have no post-secondary education; and
 - transience rate, based on a student mobility rate.
- 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.
- Students enrolled in home education are not counted for funding under this section.

School Jurisdiction	SES Incidence Rate
Almadina School Society	0.500
Aurora School Ltd.	0.165
Boyle Street Education Centre	1.000
Calgary Arts Academy Society	0.156
Calgary Girls' School Society	0.130
CAPE – Centre for Academic and Personal Excellence Institute	0.226
Connect Charter School Society	0.201
Foundations for the Future Charter Academy Charter School Society	0.186
Lloydminster Public School Division	0.200
Lloydminster Roman Catholic Separate School Division	0.200
Mother Earth's Children's Charter School Society	0.214
New Horizons Charter School Society	0.114
Suzuki Charter School Society	0.169
The Aspen View School Division	0.224
The Battle River School Division	0.195
The Black Gold School Division	0.180
The Buffalo Trail School Division	0.184
The Calgary Roman Catholic Separate School Division	0.185
The Calgary School Division	0.218
The Canadian Rockies School Division	0.219
The Chinook's Edge School Division	0.191
The Christ the Redeemer Catholic Separate School Division	0.178
The Clearview School Division	0.178
The East Central Alberta Catholic Separate School Division	0.194
The East Central Francophone Education Region	0.203
The Edmonton Catholic Separate School Division	0.237
The Edmonton School Division	0.256
The Elk Island Catholic Separate School Division	0.153
The Elk Island School Division	0.175

School Jurisdiction	SES Incidence Rate
The Evergreen Catholic Separate School Division	0.177
The Foothills School Division	0.180
The Fort McMurray Roman Catholic Separate School Division	0.175
The Fort McMurray School Division	0.187
The Fort Vermilion School Division	0.200
The Golden Hills School Division	0.221
The Grande Prairie Roman Catholic Separate School Division	0.181
The Grande Prairie School Division	0.219
The Grande Yellowhead School Division	0.218
The Grasslands School Division	0.185
The Greater North Central Francophone Education Region	0.229
The Greater St. Albert Roman Catholic Separate School Division	0.165
The High Prairie School Division	0.280
The Holy Family Catholic Separate School Division	0.247
The Holy Spirit Roman Catholic Separate School Division	0.211
The Horizon School Division	0.193
The Lakeland Roman Catholic Separate School Division	0.242
The Lethbridge School Division	0.227
The Living Waters Catholic Separate School Division	0.221
The Livingstone Range School Division	0.221
The Medicine Hat Roman Catholic Separate School Division	0.211
The Medicine Hat School Division	0.231
The Northern Gateway School Division	0.207
The Northern Lights School Division	0.227
The Northland School Division	0.298
The Northwest Francophone Education Region	0.206
The Palliser School Division	0.191
The Parkland School Division	0.172
The Peace River School Division	0.238
The Peace Wapiti School Division	0.194
The Pembina Hills School Division	0.198
The Prairie Land School Division	0.182
The Prairie Rose School Division	0.224
The Red Deer Catholic Separate School Division	0.203
The Red Deer School Division	0.232
The Rocky View School Division	0.145
The Southern Francophone Education Region	0.191
The St. Albert School Division	0.178
The St. Paul School Division	0.195
The St. Thomas Aquinas Roman Catholic Separate School Division	0.225
The Sturgeon School Division	0.182
The Westwind School Division	0.205
The Wetaskiwin School Division	0.231
The Wild Rose School Division	0.205
The Wolf Creek School Division	0.223
Valhalla School Foundation	0.194
Westmount Charter School Society	0.121

Section 1.11 — 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
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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 Frozen Funded Enrolment	X	Supports and Services Rate
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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 2019/20 Inclusive Education funding for supports and services plus differential modifiers is less than what a **school jurisdiction** received in 2011/12 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 2012/13 program equity allocation adjusted for enrolment.

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

FTE Frozen Funded Enrolment	X	Additional Per Student Rate
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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 1.12 — Northern Allowance Funding

ALLOCATION FORMULA

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

ALLOCATION CRITERIA

1. Northern allowance funding is provided to eligible **school jurisdictions** and **accredited funded private schools** based on the **FTE funded enrolment** of all schools located in their respective zones.
2. Zones are described as follows:
 - a. Lower Zone – **schools** located between the 55th and 56th parallels of latitude.
 - 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.

Section 1.13 — Small Schools by Necessity Funding

Metro school jurisdictions and charter schools are not eligible for this funding.

ALLOCATION FORMULA

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

1. TOTAL BASE ALLOCATION

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

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

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

2. TOTAL VARIABLE ALLOCATION

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

TABLE 1

Grade Category	School Rate	Peak Enrolment	Small School FTE funded enrolment Limit	# of Grades in the Grade Configuration
K to 3	\$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**.

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

Where

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

And

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

a.

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

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

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

Where

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

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:

- the **distance** from the small school to the receiving schools must be within 25 km for **schools** in rural areas, and within 6 km for **schools** in urban areas. Urban areas are defined as Edmonton, Calgary, Red Deer, Lethbridge, Medicine Hat, Fort McMurray, Grande Prairie, St. Albert, Sherwood Park, Spruce Grove, and Stony Plain.
- the receiving schools must have available capacity to accommodate the additional students. Available capacity at a receiving school is defined as 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.
- 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 1.14 — Small Board Administration Funding

ALLOCATION FORMULA

Funding is provided to eligible **school jurisdictions** 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:

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

OR

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

FTE Funded Enrolment	Allocation Formula
i. Less than 500	\$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 1.15 — Equity of Opportunity Funding

Equity of Opportunity	=	Per Student Allocation	+	Density Allocation	+	Distance Allocation
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1. PER STUDENT ALLOCATION

The greater of \$60,000* or FTE Funded Enrolment	X	\$101
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School jurisdictions, charter schools, accredited funded private schools and private ECS operators are eligible for funding under the Per Student allocation. **Accredited funded private schools** receive 70 per cent 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{\text{Effective Transportation Area}}{\text{FTE Equity of Opportunity Enrolment}} \right) \times \text{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, print-based distance education programs (Code 621), **online programs** (Code 620), institutional programs (Code 550) and Hutterite colony **schools**.

DISTANCE ALLOCATION

(One-way distance of school to closest Major Service Centre – 40	X	FTE Equity of Opportunity Enrolment	X	\$1.45
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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, print-based distance education programs (Code 621), **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 1.16 — Hutterite Colony Schools Funding

ALLOCATION FORMULA

Hutterite Colony School Funding	=	# of colony schools with funded children/students	X	Rate per colony school
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A **school jurisdiction** may only charge a fee when it can substantiate that the cost of providing services for students in colony **schools** exceeds the funding they are receiving for those students. In these situations, an application must be made to the Assistant Deputy Minister, Strategic Services 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 1.17 — Francophone Equivalency Funding (Francophone Regional Authorities)

ALLOCATION FORMULA

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

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

Section 1.18 — Plant Operations and Maintenance (School Jurisdictions)

ALLOCATION FORMULA

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

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 student in a print-based distance education program (Code 621), **online program** (code 620) is not included;
- 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
Aurora School Ltd.	1.00
Boyle Street Education Centre	1.00
Calgary Arts Academy Society	1.00
Calgary Girls' School Society	1.00
CAPE – Centre for Academic and Personal Excellence Institute	1.00
Connect Charter School Society	1.00
Foundations for the Future Charter Academy Charter School Society	1.00
Lloydminster Public School Division	1.02
Lloydminster Roman Catholic Separate School Division	1.02
Mother Earth's Children's Charter School Society	1.00
New Horizons Charter School Society	1.00
Suzuki Charter School Society	1.00
The Aspen View School Division	1.03
The Battle River School Division	1.02
The Black Gold School Division	1.00
The Buffalo Trail School Division	1.04
The Calgary Roman Catholic Separate School Division	1.00
The Calgary School Division	1.00
The Canadian Rockies School Division	1.02
The Chinook's Edge School Division	1.02
The Christ the Redeemer Catholic Separate School Division	1.02
The Clearview School Division	1.04
The East Central Alberta Catholic Separate School Division	1.03
The East Central Francophone Education Region	1.07
The Edmonton Catholic Separate School Division	1.00
The Edmonton School Division	1.00
The Elk Island Catholic Separate School Division	1.00
The Elk Island School Division	1.00
The Evergreen Catholic Separate School Division	1.01
The Foothills School Division	1.00
The Fort McMurray Roman Catholic Separate School Division	1.06
The Fort McMurray School Division	1.06
The Fort Vermilion School Division	1.13
The Golden Hills School Division	1.01
The Grande Prairie Roman Catholic Separate School Division	1.05
The Grande Prairie School Division	1.04
The Grande Yellowhead School Division	1.04
The Grasslands School Division	1.02

School Jurisdiction	Sparsity-Distance Index
The Greater North Central Francophone Education Region	1.07
The Greater St. Albert Roman Catholic Separate School Division	1.00
The High Prairie School Division	1.04
The Holy Family Catholic Separate School Division	1.05
The Holy Spirit Roman Catholic Separate School Division	1.03
The Horizon School Division	1.04
The Lakeland Roman Catholic Separate School Division	1.04
The Lethbridge School Division	1.02
The Living Waters Catholic Separate School Division	1.03
The Livingstone Range School Division	1.02
The Medicine Hat Roman Catholic Separate School Division	1.02
The Medicine Hat School Division	1.02
The Northern Gateway School Division	1.03
The Northern Lights School Division	1.04
The Northland School Division	1.09
The Northwest Francophone Education Region	1.09
The Palliser School Division	1.02
The Parkland School Division	1.00
The Peace River School Division	1.07
The Peace Wapiti School Division	1.07
The Pembina Hills School Division	1.02
The Prairie Land School Division	1.07
The Prairie Rose School Division	1.07
The Red Deer Catholic Separate School Division	1.01
The Red Deer School Division	1.01
The Rocky View School Division	1.00
The Southern Francophone Education Region	1.04
The St. Albert School Division	1.00
The St. Paul School Division	1.03
The St. Thomas Aquinas Roman Catholic Separate School Division	1.01
The Sturgeon School Division	1.00
The Westwind School Division	1.03
The Wetaskiwin School Division	1.01
The Wild Rose School Division	1.04
The Wolf Creek School Division	1.02
Valhalla School Foundation	1.00
Westmount Charter School Society	1.00

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 1.19 — 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 1.4 (Home Education), 1.13 (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 division, funding will be provided for that **eligible passenger** at the lowest **density** rate between the separate division and the public division.
 - 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 1.20 — Boarding Funding

ALLOCATION FORMULA

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

1. The **parents** of the eligible **funded student** must reside in the **school jurisdiction**.
2. Boarding funding is paid if the **funded student** is directed by a **board** to attend a **school** in Alberta 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 1.21 — Rural Transportation Funding

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
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PLUS

ii.	Distance Allocation	=	Applicable Eligible Transportation Distance (kms) for each Eligible passenger/Eligible Transported ECS Child	X	Applicable Distance Rate
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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 passengers**, 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
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The total annual support for inter-school transportation is the aggregate of the amounts calculated for each bus providing inter-school transportation.

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c. Cooperative Transportation

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

# of non-resident eligible passenger/eligible transported ECS children transported under a cooperative bussing arrangement	X	50% of the transporting board's Density Rate
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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 1.24 – 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 1.22 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.
- 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 1.24 Special Transportation or a **funded child** counted under Section 1.26, 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 1.24, 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 1.24, 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.

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REVIEW2. 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**;
- 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.

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- h. If a **board** is providing transportation services under a cooperative bussing arrangement with another **board** and the two **boards** are not sharing a co-terminus area, the area of the **board** receiving transportation services 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.
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 1.26, 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 *Education Act* and the *School Transportation Regulation*.

Note: the rural funding application includes the rural special transportation section. Refer to Section 1.24 Special Transportation for rural special transportation allocation criteria.

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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**.
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 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 1.22 — 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
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PLUS

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

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

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

c. COOPERATIVE TRANSPORTATION

In addition to 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
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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 1.24, 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	=	$\left(\begin{array}{c} \text{Francophone} \\ \text{eligible passenger} \\ \text{Grades 1 to 12} \end{array} + \begin{array}{c} \text{Francophone} \\ \text{eligible} \\ \text{transported} \\ \text{ECS children} \end{array} \right)$	X	3.5 (weighted factor)	X	Urban Francophone transportation rate
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ALLOCATION CRITERIA

1. General

- 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 1.21, Rural Transportation.
- 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**

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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 1.24, Special Transportation Funding, or a **funded child** who is counted under Section 1.26, 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 1.24, 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 1.24, 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.

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.

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- 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
- 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 1.26, 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 urban transportation.

DOCUMENTATION AND REPORTING REQUIREMENTS

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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 *Education Act* and the *School Transportation Regulation*.

Note: the urban funding application includes the urban special transportation section. Refer to Section 1.24, 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.
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;
 - 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 — Metro Urban Transportation Funding

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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)	+	$\left(\frac{\text{Funded students and funded children}}{\text{X } 0.7300} \right)$	=	
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			=	

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

Metro Urban Transportation Funding	=	$\left(\frac{\text{Expected Eligible passengers}}{\text{X Metro Urban Transportation Block Funding}} \right)$	+	$\left(\frac{[0.8 \times \text{Severely Disabled Students (Grades 1 - 12)] (per Severe Disability profile)}}{\text{X Special Transportation Rate}} \right)$
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- c. ECS **funded children** will be included in the metro urban transportation funding formula with the following adjustments to the coefficients/benchmarks:
- the average elementary **school** size will be adjusted to include ECS **funded children**;
 - the walk percentage will be reduced from 0.80 for elementary **schools** to 0.75 for ECS elementary **schools**; and
 - the eligible enrolment coefficient will be reduced from 0.735 to 0.730.

ALLOCATION CRITERIA

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1. The Edmonton School Division, The Edmonton Catholic Separate School Division, The Calgary School Division and The Calgary Roman Catholic Separate School Division 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 **schools** 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 **schools** servicing the three **school** levels in the public and separate **school boards** in Edmonton and Calgary:
 - a. institutions, **outreach schools**, **schools** that solely serve **home education students**, and other special **schools** (**schools** where the majority of the **funded students** are special education needs students) as determined by School Finance are excluded;
 - b. an ECS – elementary **school** with fewer than 75 students is not counted;
 - c. an ECS – elementary **school** with 75 or more students and 3 or fewer grades will be counted as half an ECS – elementary **school**;
 - d. a junior high **school** with fewer than 75 students is not counted;
 - e. a senior high **school** with fewer than 75 students is not counted; and
 - f. a senior high **school** with fewer than 200 but with 75 or more students is counted as a junior high **school**.
5. The formula used to calculate metro urban transportation funding contains the number of **schools** by level, the residential area, and the number of **funded students** attending **schools** within the jurisdiction.
6. 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 1.26, 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 1.24, Special Transportation Funding, or a **funded child** who is counted under Section 1.26, 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.

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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 1.21, Rural Transportation funding or Section 1.22, 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 1.24 — Special Transportation Funding (Gr. 1-12)

ALLOCATION FORMULA

1. a. Urban Special Transportation:

Special Transportation Allocation	=	# of students with disabilities transported (see Allocation Criteria 1)	X	Urban Special Rate
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- b. Rural Special Transportation:

Special Transportation Allocation	=	# of students with disabilities transported (see Allocation Criteria 1)	X	Rural Special Rate
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- c. Weekend Transportation

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

REVISED

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 1.22 Rural Transportation Funding or 1.23 Urban Transportation Funding. **School jurisdictions** are prohibited from charging student transportation fees for resident **students with disabilities** who cannot use regular transportation services.
2. All **school jurisdictions** (rural, urban and metro urban) transporting **children with disabilities/delays** shall claim ECS special transportation funding under Section 1.26.
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**.
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 division in which the **parent** of the **student with a disability** resides.

DOCUMENTATION AND REPORTING REQUIREMENTS

SECTION UNDER REVIEW

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 *Education 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 1.26.
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 1.25 — ECS Regular Transportation Funding (Private ECS Operators)

SECTION UNDER REVIEW

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 1.6, 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**.
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 1.21, Rural Transportation Funding; Section 1.22, Urban Transportation Funding; and Section 1.23, 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.

SECTION
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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.
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 1.26 — 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)
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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.
 - d. **ECS operators** are prohibited from charging student transportation fees for ECS **children with disabilities** who cannot use regular transportation services.
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.

NEW

SECTION
UNDER
REVIEW

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 1.6 ECS Program Unit Funding.
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.
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 programs** beginning after September 30: the count date for transportation will be the last **operating day** in the month in which the program begins. The electronic ECS transportation claim form must be submitted to the Business Operations and Stakeholder Support Branch within 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
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ALLOCATION CRITERIA

REVISED

1. Children with mild/moderate disabilities/delays or those who are gifted and talented must be at least 3 years 8 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 8 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 Education website at www.education.alberta.ca. Please select "Special Needs Funding ECS-12 (669) under "My Applications" after you have signed in.

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
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ALLOCATION CRITERIA

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

Section 2.6 — ECS Administration Funding

ALLOCATION FORMULA

Total ECS Funding	X	5.4%
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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 FORMULA

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**.
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**.

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.

NEW

A standard Resident Board Consultation form is available in the forms section of this manual.

REVISED

5. The **DSEPS** must submit a list of students who have joined in the current school year to the Director, School Finance Branch by October 15 identifying students:
 - 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**.
6. 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** enrolls student without consulting the **resident board** (applicable 50 code);
 - c. \$7,537.59 per **student with a severe disability** (applicable 40 code).
7. Transfer of base instruction funding between jurisdictions and **DSEPS** is not required for students who move after the **September count date**.
8. An **accredited funded private school** wishing to become a **DSEPS** or a **DSEPS** wishing to add a new **school** site must submit an application by April 30 (of the prior school year) to the School Accreditation, Standards and Print Services.

REVISED

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

# of approved students with severe disabilities	X	Severe Disability Funding Rate
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ALLOCATION CRITERIA

1. **Accredited funded private schools** and **charter schools** will use the severe disabilities categories and codes outlined in the *Special Education Coding Criteria* and the handbook for the Identification and Review of **Students with severe disabilities** to determine a student's eligibility and to properly code the student for funding purposes.
2. Severe disability funding will be based on approval of the student's eligibility by the 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
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ALLOCATION CRITERIA

1. An **accredited funded private school** may receive early literacy funding for programs provided for funded students in Grades 1 and 2.
2. In order to access funding, an **accredited funded private school** must indicate on the 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
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ALLOCATION CRITERIA

1. Funding is based on the # of funded students taken from the frozen funded headcount of the previous year.
2. For the purpose of this grant:
 - a. a student in a print-based distance education program (code 621) or online program (code 620) is not included; and
 - b. a home education student is not included.
3. 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

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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
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ALLOCATION CRITERIA

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 **accredited funded private schools** is based on the number of self-identified FNMI **FTE students** only. Note: does not include FNMI **FTE children**.
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, **First Nations students who reside on a reserve** 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

REFERENCES

[Aboriginal Student Self-Identification](#)

[Aboriginal Student Self-Identification Information for School Authorities](#)

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
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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

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)
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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

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

- i. 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.
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 — 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.

Example:

- o Enrolment for September 2018: 300 children/students
- o $300 \times \$562 = \$168,600$

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.

REPORTING

Annual reporting on all IFNE projects will be required for submission to the First Nations, Métis and Inuit Education Directorate by September 30, 2020. 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 4.5 — 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. 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
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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 three months after the fiscal year-end of the **First Nation Education Authority**.

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 three months after the fiscal year-end of the **First Nation Education Authority**, following the 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

Enhancing Second-Level Supports in First Nations Education

Section 4.6 —First Nations Education Services Agreements

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

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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
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ALLOCATION CRITERIA

- Under an agreement between the Governments of Canada and Alberta, and according to Section 14(1) of the *Education Act*, **Francophone Regional Authorities** may receive federal funds for providing a **Francophone education** for **funded students** in ECS to Grade 12.
- Francophone Regional Authorities** may also include as **funded students** under this section:
 - a **funded student** they have directed to attend College Mathieu in Gravelbourg, Saskatchewan; or
 - a student directed by a **Francophone Regional Authority** to attend another **school jurisdiction** and registered by the jurisdiction.
- A **First Nations child/student who resides on a reserve** is not eligible for funding under this section.
- 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:
 - ECS to Grade 6: 712 hours/year;
 - Grade 7 to 9: 570 hours/year;
 - Grade 10 to 12: 600 hours/year.
- For children/students with access to less French instruction time than indicated in criteria #4, the following formula must be used:
 - ECS to Grade 9

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

- Grades 10 to 12

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

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

- 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 grade 12 in the following categories:
 - Alternative French Language Programs** (French programs offered under Section 17(2) and 19 (1)(a) of the *Education Act*, including French Immersion); and
 - French as a Second Language (FSL)** courses (French programs offered under Section 17 and 18 of the *Education Act*).
- An individual who is a **First Nations student with status who resides on a reserve** is not eligible to be counted for funding under this section.
- To be counted as a **FTE funded child/student**, the minimum instructional hours to be provided for in French must be:
 - ECS – Grade 6: 712 hours/year;
 - Grades 7 – 9: 570 hours/year;
 - Grades 10 – 12: 600 hours/year.
- The minimum instructional hours in French for **alternative French language programs** are:
 - ECS: 238 hours/year;
 - Grades 1-6: 475 hours/year;
 - Grades 7-9: 380 hours/year; and
 - Grades 10-12: 250 hours/year.
- Grants code 211 must be used for students having access to the minimum instructional hours in French as outlined in #4; and
 - Grants code 230 must be used for students having access to less than the minimum instructional hours in French as outlined in #4.
- 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

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

- b. Grades 10 to 12

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

9. a. For children/students from ECS to Grade 9, with access to less French Instruction than identified in 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 **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
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1. PER STUDENT ALLOCATION

- 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**.
- Funded students** enrolled in **home education, shared responsibility, outreach**, print-based distance education or **online programs** are included in this allocation.
- Funding is based on the **FTE funded enrolment** taken from the previous year's **frozen funded headcount**.

Eligible Students	X	Per Student Rate
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2. REGIONAL DIFFERENTIAL MODIFIERS ALLOCATION

- 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 1.11 – 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, print-based distance education or online programs**.

Eligible Students	X	Regional Differential Modifiers Per Student Rate
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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 1.11 – 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

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

- i. 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.
- ii. Targeted funding is provided to certain regions to support provincial braille transcription services.

ALLOCATION CRITERIA

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.
3. Children and youth, who are registered with **school authorities** and First Nations schools in alternative programs such as **home education, shared responsibility, outreach**, print-based distance education 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 designated banker **school boards** identified by the Regional Executive Team to administer the funds on behalf of all partners.
6. A designated banker **school board** must be a public or separate **school board**.

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)

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.
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 19AE5.4) 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 jurisdictions** 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 – School Nutrition Program

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.

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.

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 6.5 — Dual Credit 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. Start-up funding is not available to **charter schools** and **accredited funded private schools**.

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**.

ALLOCATION FORMULA

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 2020/21 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 third intake can be accessed through an online application process via the Alberta Dual Credit website beginning May 1, 2019, and will remain open until November 15, 2019, 5:00 p.m. **School authorities** that are approved for start-up funding will be notified in December 2019 and will receive the funding in September 2020.

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;

Institutional Funding is also provided for the following other education programs and day student who:

 - c. require long term intensive medical care which can only be provided onsite at the hospital; or
 - d. are a temporary resident of an emergency stage 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 19AE7.1 to the Learner Services Branch by April 30 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 19AE7.1 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	The Canadian Rockies School Division
Central Alberta Regional Consortium	The Red Deer School Division
Consortium Provincial Francophone	The Southern Francophone Education Region
Edmonton Regional Learning Consortium	The Elk Island Catholic Separate School Division
Learning Network	The Lakeland Roman Catholic Separate School Division
Northwest Regional Learning Consortium	The Grande Prairie School Division
Southern Alberta Regional Professional Development Consortium	The Lethbridge School Division

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, 2020, 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 30, 2020 followed by a final version of the report and a financial statement by December 31, 2020.
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
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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. The Fort McMurray School Division;
 - b. The Fort McMurray Roman Catholic Separate School Division;
 - c. The Greater North Central Francophone Education Region (Centre Communautaire Scolaire Boréal only); and
 - d. The Northland School Division (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 19AE7.5 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 19AE7.5 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)

Payment Processing for School Facilities transferred 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 a print-based distance education program (Code 621), **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 2019/20 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		2019/20
For the 2019/20 school year , class size, school fees, school transportation fees and class size improvement funding have been repurposed. New One-Time Transition funding has been introduced. All other funding rates remain the same as for the 2018/19 school year .		
REVISED	Base Instruction Funding	
	ECS Base Instruction Rate (per funded child)	\$3,339.90
	Grades 1 to 9 Base Instruction Rate (per funded student)	\$6,679.79
	Grades 10 to 12 (per CEU)	
	See Section 10.1, CEU Funding Tiers list	
	Tier 1, 2 ,3 CEU Rate	\$190.85
	Tier 4 CEU Rate (Work Experience and Special Projects)	\$114.50
	Tier 5 CEU Rate (dual enrolled dual credit)	\$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
	ADLC course CEUs funded at 44% of the Tier 1 CEU Rate	
NEW	One-Time Transition (per FTE funded enrolment)	
	Metro/Urban/Charter jurisdictions	\$203.00
	Rural/Francophone jurisdictions	\$356.00
	ECS Program Unit Funding (PUF)	
	Maximum per eligible funded child	\$25,051.20
	Maximum for each additional funded child in a unit	\$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
	Equity of Opportunity	
	Per Student (per FTE funded enrolment)	\$101.00
	Density and Distance	per formula
	First Nations, Métis and Inuit Education (per eligible FTE First Nations, Métis and Inuit funded child/student)	\$1,178.10
	Fort McMurray Allowance (per eligible FTE employee)	\$1,040.00

School Jurisdiction Funding Rates		2019/20
Francisation (per eligible FTE funded child/student)		\$1,178.10
Francophone Equivalency Access (per eligible funded student)		\$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 1.4)		\$1,670.81 \$1,670.81
Hutterite Colony Schools (per colony school)		\$11,541.30
Inclusive Education (see Section 1.11) Supports and Services (per FTE frozen funded enrolment) Differential Modifiers and Program Equity Additional Per Student (per FTE frozen funded enrolment)		\$466.49 per formula \$57.22
Innovation in First Nation Education (per eligible First Nations child/student attending a provincial school with an education services agreement)		\$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
Outreach (per approved Outreach Program)		\$62,972.76
Plant Operations & Maintenance (see Section 1.18) 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
Regional Collaborative Service Delivery (see sections 4.3, 6.1 and 6.2)		per formula
Regional Consortium (per consortium) Maintenance & Infrastructure		\$191,987
Regional Consortium (per consortium) Curriculum Implementation Support		per formula
School Nutrition Program (see Section 6.5)		See Section 6.5
Small Board Administration Charter School (per school) (see Section 1.14) School jurisdiction FTE funded enrolment < 2000 School jurisdiction FTE funded enrolment > 2000 but < 3000		per formula \$470,825.88 sliding scale reducing to zero
Small Schools by Necessity: Base Allocation Schools with ≤ 150 FTE funded enrolment Schools with > 150 but < 226 FTE funded enrolment		\$88,281.00 sliding scale reducing to zero

School Jurisdiction Funding Rates						2019/20
Small Schools by Necessity: Variable Allocation						
School Type	Peak Enrolment		Enrolment Limit			
K – 3	40		80			
K – 6	80		150			
K – 9	80		220			
K – 12	80		290		\$2,943.72	
Socio-Economic Status (per eligible FTE funded enrolment x the applicable incidence rate)					\$471.24	
SuperNet Services (max. per month per approved site)					\$800.00	
Transportation Funding:						
1. Urban Transportation						
10,000-29,999 population (per eligible passenger/eligible transported ECS child)					\$507	
30,000-49,999 population (per eligible passenger/eligible transported ECS child)					\$487	
50,000 + population (per eligible passenger/transported child)					\$466	
Distance (km)	2.4 - 6.0	6.01 - 10	10.01 - 14	14.01 - 18	> 38	
Rate per km	\$10.58	\$15.48	\$18.52	\$21.30	\$31.45	
Parent-provided ECS Transportation (including children with a disability/delay)					\$549	
ECS Special Transportation (per round trip per child with a disability/delay - max. of 185 trips)					\$18.24	
Special Transportation (per eligible student with a disability)					\$3,374	
Weekend Transportation (per eligible funded student)					\$4,743	
Boarding Transportation (per eligible funded student)					\$4,263	
Inter-school Transportation (per km for two-way distance between schools for eligible programs)					\$1.09	
2. Metro Urban Transportation						
Regular Transportation (per expected eligible passenger)					\$549	
Parent-provided ECS Transportation (including children with a disability/delay)					\$549	
ECS Special Transportation (per round trip per child with a disability/delay - max. of 185 trips)					\$18.24	
Special Transportation (per funded student based on severe profile)					\$3,374	

School Jurisdictions Funding Rates								2019/20		
3. Urban Francophone Transportation										
10,000-19,999 population (per eligible passenger/eligible transported ECS child)								\$642		
20,000-29,999 population (per eligible passenger/eligible transported ECS child)								\$595		
30,000 + population (per eligible passenger/eligible transported ECS child)								\$549		
Parent-provided ECS Transportation (including children with a disability/delay)								\$549		
ECS Special Transportation (per round trip per child with a disability/delay - max. of 185 trips)								\$18.24		
Special Transportation (per eligible student with a disability)								\$3,374		
Weekend Transportation (per eligible funded student)								\$4,743		
Boarding Transportation (per eligible funded student)								\$4,263		
Inter-school Transportation (per km for two-way distance between schools for eligible programs)								\$1.09		
4. Rural Transportation										
Regular Transportation (per eligible passenger/eligible transported ECS child) (see Section 1.21)							Per formula based on grid below			
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	
Rate per km	\$10.58		\$15.48		\$18.52		\$21.30		\$26.12	
Parent-provided ECS Transportation (including children with a disability/delay)								\$549		
ECS Special Transportation (per round trip per child with a disability/delay - max. of 185 trips)								\$18.24		
Special Transportation (per eligible student with a disability)								\$6,748		
Weekend Transportation (per eligible funded student)								\$4,743		
Boarding Transportation (per eligible funded student)								\$4,263		
Inter-School Transportation (per km for two-way distance between schools for eligible programs)								\$1.09		

Section 9.2 — Private ECS Operators Funding Rates

ECS Funding for Private ECS Operators and Accredited Funded Private Schools with ECS Programs		2019/20
For the 2019/20 school year , funding rates remain the same as for the 2018/19 school year .		
ECS Administration (See Section 2.6)		5.4% of ECS funding
ECS Base Instruction Funding (per funded child)		\$3,339.90
ECS Regular Transportation (per eligible transported child) Also Parent-provided ECS Transportation (including children with a disability/delay)		\$549.00
ECS Special Transportation (per round trip per child with a disability/delay - max of 185 trips)		\$18.24
English as a Second Language (ESL) (per eligible funded child)		\$589.05
Equity of Opportunity (per funded child) (see Section 1.15)		\$50.50
Mild/Moderate Disabilities/Delays, Gifted and Talented (per eligible funded child)		\$2,486.76
Plant Operations and Maintenance (per funded child)		\$397.66
Program Unit Funding (PUF) Maximum per eligible funded child Maximum for each additional funded child in a unit		\$25,051.20 \$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

Section 9.3 — Accredited Funded Private Schools

Accredited Funded Private Schools Funding		2019/20
For the 2019/20 school year , funding rates remain the same as for the 2018/19 school year .		
Base Instruction Funding		
Grades 1 to 9 (per funded student)		\$4,675.86
Grades 10 to 12 (per CEU) See Section 10.1, CEU Funding Tiers list		
Tier 1 CEU Rate		\$133.59
Tier 4 CEU Rate (Work Experience and Special Projects)		\$80.16
Tier 5 CEU Rate (dual enrolled dual credit)		\$175.00
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
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
Early Literacy (per funded student in Grades 1 and 2)		\$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)		\$824.67
Equity of Opportunity (per FTE funded student) (see Section 1.15)		\$70.70
First Nations, Métis, and Inuit (per eligible FTE funded student)		\$824.67
Home Education (per eligible funded student)		\$1,670.81
+ 50% of the cost of ADLC courses for Grades 7-12 to a maximum of:		\$1,670.81
+ additional funding for Grades 1-6 ADLC courses. (See Section 1.4)		per formula
Northern Allowance (per FTE funded enrolment)	Lower Zone	\$329.87
	Intermediate Zone	\$494.09
	Upper Zone	\$742.56
Plant Operations and Maintenance (per eligible funded student)	Grade 1 - 6	\$556.71
	Grade 7 - 9	\$525.83
	Grade 10 – 12	\$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
SuperNet Service Funding (maximum per month per approved site)		\$560.00

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.

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 16, 2019	March 31, 2020
October 15, 2019	April 15, 2020
November 15, 2019	May 15, 2020
December 16, 2019	June 15, 2020
January 15, 2020	July 15, 2020
February 17, 2020	August 17, 2020
March 06, 2020	

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

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 – Innovation in First Nation Education

September/October*	⇔ 100%
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*Payment is contingent on receipt of an approved application

Section 4.5 – First Nation Framework Agreement Enhancement Funding

September/October*	⇔ 100%
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*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%
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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

Section 6.4 – School Nutrition Program

On approval of the finalized financial schedule due August 31	⇔ 80% upon approval of proposed budget
	⇔ 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 on 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

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 and approved before the first payment is made.

PART 2 – Early Childhood Services (ECS) Funding

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

PART 2 – Early Childhood Services (ECS) Funding

January* ⇔ 70% advance based on transportation claim

April ⇔ 100% less previous payments

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

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 and approved before the first payment is made.

PART 3 – Accredited Funded Private Schools Funding

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

September (Gr. 1-12)*	⇔	20% advance based lesser of previous year enrolment/ CEUs or AOP enrolment.
October (Gr. 1-12)	⇔	40% based on current year enrolments and estimated CEUs less previous payments.
January (Gr. 1-9) and DSEPS (Gr. 1-12)	⇔	50% based on current year enrolments/estimated CEUs less previous payments.
February (Gr. 1-9) and DSEPS (Gr. 1-12)	⇔	60% based on current year enrolments/estimated CEUs less previous payments.
March (Gr. 1-12)	⇔	70% based on current year enrolments/ CEUs less previous payments.
April (Gr. 10-12)	⇔	70% based on current year CEUs less previous payments.
April (Gr. 1-9) and DSEPS (Gr. 1-12)	⇔	80% based on current year enrolments/ CEUs less previous payments.
May (Gr. 1-9) and DSEPS (Gr. 1-12)	⇔	90% based on current year enrolments/ CEUs less previous payments.
June (Gr. 1-9) and DSEPS (Gr. 1-12)	⇔	100% based on current year enrolments/ CEUs less previous payments.
August (Gr. 10-12)	⇔	100% based on current year CEUs and enrolment adjustments less previous payments.

* Advance payments will be made based on enrolment estimates.

PART 5 – Federal French Funding

Section 5.2 – Federal French Language

March/April	⇔	100%
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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

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 students** in Grades 1 to 9 will use **September count dates** determined by School Finance on an individual basis to ensure fair and equitable funding for the students they are educating.
7. A priority school conflict (PSC) occurs when more than one **school** claims the **funded child/student** on the **September count date**. In the situation that more than one **school** is claiming the same **funded child/student** for funding purposes, the priority **school** is the **school** in which a **funded child/student** is deemed to have been enrolled and in attendance on the **September count date**.
8. Priority school conflicts must be resolved before a **school authority** is entitled to receive funding for a **funded child/student**. When priority school conflicts occur, **school authorities** should make every effort to resolve them as they have first-hand knowledge of the instruction the student is receiving and are in the best position to determine a fair and equitable solution.
9. If **school authorities** cannot resolve a priority school conflict, they should forward supporting documentation as follows to the School Finance Branch by 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

- 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 Director of the School Accreditation, Standards and Print Services Branch.
2. An **accredited funded private school** accredited through the School Accreditation, Standards and Print Services 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**.
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.
6. **Accredited funded private schools** must remain in active status according to Corporate Registries. Payments may be withheld for 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

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, CTS courses, knowledge and employability courses, registered apprenticeship program courses, and language courses are funded at the tier 1 rate. **Knowledge and Employability** courses are funded at 8/5 times the tier 1 rate.

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.

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

REVISED

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
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
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
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 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.
7. New **Private ECS operators** 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.

8. **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.
9. **Private ECS operators** must remain in active status according to Corporate Registries. Payments may be withheld for operations not in good standing or of those that have outstanding annual returns with Corporate Registries.

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 19AE7.1) 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 19AE1.2b.

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 19AE1.3a); 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 19AE1.3b).

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

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 courses.
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)

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.
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.
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 not 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.

5. **All school authorities** must report actual expenditures for PUF children using Form 19AE1.5b, 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: <https://www.alberta.ca/student-and-educator-exchange-programs.aspx>

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
 - 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.

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.
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.
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	Emily Ma	(780) 422-0311
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	Jennifer Cassidy	(780) 422-3460
Field Services		
Central Services	Garret Doll	(780) 415-9310
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	Regena Wiseman	(780) 415-2967
PASI Project and Student Records		
studentrecords@gov.ab.ca		(780) 422-9337
School Accreditation and Standards	Jason Paradis	(780) 427-5293
School and Community Supports for Children and Youth	Joseph Otitoju	(780) 422-5045
School Finance	Daimen Tan	(780) 422-0865
	Sharon Johnson	(780) 422-0930
	William Poon	(780) 427-2055
Technology Leadership Branch	Dave Hauschildt	(780) 415-0824
Workforce Development Help Desk	Help Desk	(780) 427-5318
wfdhelpdesk@gov.ab.ca		

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 *2019/20 Funding Manual for School Authorities* is available for viewing and printing on Alberta Education's website at <https://www.alberta.ca/k-12-education-funding-framework.aspx>.

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.
4. The ceasing of operations by a **private ECS operator** may also be a result of the **Minister** not approving the **AOP** submitted for the respective school year.

NEW

PROCEDURES

1. When the **private ECS operator** has made a decision to cease operations, a letter must be sent to the School Accreditation, Standards and Print Services 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
19AEDSA	Delegation of Signing Authority Form	October 31, 2019	SF
19AE1.2b	Funded Students Attending First Nations Schools	October 31, 2019	SF
19AE1.4a	Application for Reimbursement of ADLC Course Costs for Home Education Students in Grades 7 to 12.	May 29, 2020	SF
19AE1.4b	Funding Application for Additional ADLC Course Costs for Home Education Students in Grades 1 to 6	May 29, 2020	SF
19AE1.6b	ECS PUF Statement of Actual Expenditures (2018/19)	November 29, 2019	SF
Electronic Submission	ECS PUF application submission – <u>including children details</u> (Private Schools, Private ECS Operators and Charters)	November 15, 2019	SF
Electronic Submission	ECS PUF application submission – <u>including children details</u> (Jurisdictions)	November 29, 2019	SF
Electronic Submission	ECS PUF Budget including details and supporting PUF budget template as an attachment (Private Schools, Private ECS Operators and Charters).	November 29, 2019	SF
Electronic Submission	Application Form - Rural Transportation	November 29, 2019	BOSS
Electronic Submission	Application Form - Special Transportation and Boarding	November 29, 2019	BOSS
Electronic Submission	Application Form - Urban Transportation	November 29, 2019	BOSS
Electronic Submission	Application Form - ECS Transportation (Private ECS and Private Schools offering ECS programs)	October 31, 2019	BOSS
Electronic Submission	Application for Alberta Dual Credit start-up funding	October 31, 2019	Alberta Dual Credit Webpage
19AE3.2	Resident Board Consultation Form	October 15, 2019	SF
19AE6.3	SuperNet Service Funding Application	Upon Connection	TLB
19AE7.1	Institutional Programs – Budget (2019/20)	April 30, 2019	SF
	– Final (2018/19)	October 15, 2019	SF
19AE7.5	Ft. McMurray Allowance FTE Calculation Form	January 31, 2020	SF
19AE8.2	2019-20 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 30, 2019
September count submission date	October 03, 2019
Course and Marks Submission or Modification (prior school year) -Term 2, 3, 4	October 15, 2019
Submission of Education Services Agreements (if applicable)	November 15, 2019
Submission of Shared Responsibility program percentages	November 29, 2019
Duplicate Course Marks (prior school year) - Respond in the Funding Event System (FES)	November 29, 2019
- Submission of documentation for Duplicate Course Marks (prior school year)	December 31, 2019
Adjustments/changes to Enrolment data and coding in PASI	February 03, 2020
Resolution of Priority School Conflicts	February 14, 2020
- Back-up documentation for Priority School Conflicts	February 21, 2020
March count date	March 02, 2020
March count submission date	March 05, 2020
Course and Marks Submission or Modification to SCM (School Course Marks)	
- Term 1	May 13, 2020
- Term 2, 3, 4	October 09, 2020
Course Conflicts	
- All Terms	November 13, 2020

Delegation of Signing Authority 2019/20 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	Signature

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 2019/20 School Year

School Authority 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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Application for Reimbursement of ADL Course Costs for Home Education Students in Grades 7 to 12 2019/20 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 2019/20 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 2018/19 School Year

School Authority Name :

Authority Code:

Please enter 4 digit code

Authority Type: #N/A

- 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 (excluding charter schools) - lesser of actual expenditures and ceiling; or
 - Private ECS Operators, Private Schools with ECS Programs and Charter Schools - lesser of actual expenditures, 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)	#N/A
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

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ECS Program Unit Funding Statement of Actual Expenditures for School Authorities 2018/19 School Year

School Authority Name: _____

of PUF Children: _____

	Budget ^{1,2}	Actual	
INSTRUCTIONAL COSTS:			
Supplemental Instructional Salaries and Wages			
Employer's Portion of Benefits			
Specialized Services and Supports			
Supplies and Materials (max \$500/child)			
PARENT INSERVICE (max \$400/child)			
STAFF INSERVICE (max \$500/child)			
TRANSPORTATION COSTS:			
(PUF Children ONLY)		Actual Costs*	Revenue
To and From School		(A)	(B)
Family Oriented Programming Sessions			
Other			
TOTALS	\$0.00	\$0.00	\$0.00
*Net Transportation Costs (A-B)		\$0.00	
	Budget ^{1,2}	Actual	
FACILITY COSTS			
ADMINISTRATION COSTS			
SPECIALIZED FURNITURE AND EQUIPMENT			

(ONLY specialized furniture and equipment that appears on the list of eligible items or items approved by Learner Services should be claimed. Please attach a list of specialized furniture and equipment purchased indicating the child's name beside each item. GST should be coded separately and not charged to PUF - please see FRA reporting guidelines.)

TOTAL ECS PUF EXPENDITURES	\$ -	\$ -
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¹ Budget is not required for School Jurisdictions (with the exception of charter schools)

² Budget reported in this column should be consistent with the budget approved in the PUF system.

*(If reporting Actual Costs, ensure Revenues are reported) For net transportation Costs if (A)-(B) is negative, enter 0.

For Designated Special Education ECS Programs offered by a private school, private ECS operator or public school authority, please complete page 3.

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ECS Program Unit Funding Statement of Actual Expenditures for School Authorities 2018/19 School Year

School Authority Name: _____ *** # of PUF Children: _____

	Budget ¹	Actual	
INSTRUCTIONAL COSTS:			
Supplemental Instructional Salaries and Wages	_____	_____	
Employer's Portion of Benefits	_____	_____	
Specialized Services and Supports	_____	_____	
Supplies and Materials (max \$500/child)	_____	_____	
PARENT INSERVICE (max \$400/child)	_____	_____	
STAFF INSERVICE (max \$500/child)	_____	_____	
TRANSPORTATION COSTS:			
(PUF Children ONLY)			
To and From School	_____	_____	_____
Family Oriented Programming Sessions	_____	_____	_____
Other	_____	_____	_____
TOTALS	\$0.00	\$0.00	\$0.00
*Net Transportation Costs (A-B)		\$0.00	
	Budget ¹	Actual	
FACILITY COSTS	_____	_____	
ADMINISTRATION COSTS	_____	_____	
SPECIALIZED FURNITURE AND EQUIPMENT	_____	_____	

(ONLY specialized furniture and equipment that appears on the list of eligible items or items approved by Learner Services should be claimed. Please attach a list of specialized furniture and equipment purchased indicating the child's name beside each item. GST should be coded separately and not charged to PUF - please see FRA reporting guidelines.)

TOTAL ECS PUF EXPENDITURES	\$ -	\$ -
-----------------------------------	-------------	-------------

¹ Budget is not required for School Jurisdictions (with the exception of charter schools)

² Budget reported in this column should be consistent with the budget approved in the PUF system.

*(If reporting Actual Costs, ensure Revenues are reported) For net transportation Costs if (A)-(B) is negative, enter 0.

For Designated Special Education ECS Programs offered by a private school, private ECS operator or public school authority, please complete page 3.

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ECS Program Unit Funding

Statement of Actual Expenditures for School Authorities

2018/19 School Year

School Authority Name: *** # of PUF Children: 0

	Budget ¹	Actual	
INSTRUCTIONAL COSTS:			
Supplemental Instructional Salaries and Wages	-	-	
Employer's Portion of Benefits	-	-	
Specialized Services and Supports	-	-	
Supplies and Materials (max \$500/child)	-	-	
PARENT INSERVICE (max \$400/child)	-	-	
STAFF INSERVICE (max \$500/child)	-	-	
TRANSPORTATION COSTS:			
(PUF Children ONLY)			
To and From School	-	-	-
Family Oriented Programming Sessions	-	-	-
Other	-	-	-
TOTALS	\$0.00	\$0.00	\$0.00
*Net Transportation Costs (A-B)		\$0.00	
	Budget ¹	Actual	
FACILITY COSTS	-	-	
ADMINISTRATION COSTS	-	-	
SPECIALIZED FURNITURE AND EQUIPMENT	-	-	

(ONLY specialized furniture and equipment that appears on the list of eligible items or items approved by Learner Services should be claimed. Please attach a list of specialized furniture and equipment purchased indicating the child's name beside each item. GST should be coded separately and not charged to PUF - please see FRA reporting guidelines.)

TOTAL ECS PUF EXPENDITURES	\$ -	\$ -
-----------------------------------	-------------	-------------

¹ Budget is not required for School Jurisdictions (with the exception of charter schools)

² Budget reported in this column should be consistent with the budget approved in the PUF system.

*(If reporting Actual Costs, ensure Revenues are reported) For net transportation Costs if (A)-(B) is negative, enter 0.

For Designated Special Education ECS Programs offered by a private school, private ECS operator or public school authority, please complete page 3.

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ECS Program Unit Funding Statement of Actual Expenditures for School Authorities 2018/19 School Year

FOR DESIGNATED SPECIAL EDUCATION ECS PROGRAMS ONLY

School Authority Name:	0	# of PUF Children:	
	# of Applicable Funded Children as at Sept. 30		
LESS APPLICABLE REVENUE			
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 ¹ (school Jurisdictions only see note 1)		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 (private)			
Socio Economic Status		incidence rate	#N/A #N/A
Plant Operation and Maintenance (private)		x	\$1,192.98 \$0.00
Other Alberta Education Revenues Specify:			
			\$0.00
TOTAL AB EDUCATION REVENUE			#N/A
REVENUES FROM OTHER SOURCES:			
Other Government of Alberta			
Federal Gov't and/or First Nations			
Other AB School Authorities			
AB Municipalities			
Day Care			
Parents and Individuals			
Investment Income			
Gifts and Donations			
Fundraising			
Gains on Disposal of Capital Assets			
TOTAL REVENUES FROM ALL SOURCES			#N/A
NET ECS PROGRAM COSTS ELIGIBLE FOR PUF (Page 2 total - Page 3 total revenues)			#N/A

Note 1 school Jurisdictions only - supports and services and per student allocation for non-PUF children only

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ECS Program Unit Funding Statement of Budgeted Expenditures for School Authorities 2019/20 School Year

School Authority Name: *** # of PUF Children

	Budget ¹	Actual	
INSTRUCTIONAL COSTS:			
Supplemental Instructional Salaries and Wages	-	-	
Employer's Portion of Benefits	-	-	
Specialized Services and Supports	-	-	
Supplies and Materials	-	-	
PARENT INSERVICE (max \$400/child)	-	-	
STAFF INSERVICE (max \$500/child)	-	-	
TRANSPORTATION COSTS: (PUF Children ONLY)	Budgeted Costs (A)		Revenue (B)
To and From School	-	-	-
Family Oriented Programming Sessions	-	-	-
Other	-	-	-
TOTALS	-	-	-
*Net Transportation Costs (A-B)	-		
	Budget ¹	Actual	
FACILITY COSTS	-	-	
ADMINISTRATION COSTS	-	-	
SPECIALIZED FURNITURE AND EQUIPMENT	-	-	
(ONLY specialized furniture and equipment that appears on the list of eligible items or items approved by Learner Services should be claimed. Please attach a list of specialized furniture and equipment purchased indicating the child's name beside each item. GST should be coded separately and not charged to PUF - please see FRA reporting guidelines.)			

TOTAL ECS PUF EXPENDITURES	\$	-	\$	-
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¹ Budget is not required for School Jurisdictions

*(If reporting Actual Costs, ensure Revenues are reported) For net transportation Costs if (A)-(B) is negative, enter 0.

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.

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Resident Board Consultation Form 2019/20 School Year

Resident Board: _____

Student: _____

Last

First

Middle

Date of Birth: _____ ASN: _____
dd/mm/yyyy

School: _____ Grade: _____

Diagnosis: _____ Date: _____

ISP / IPP: ☐ No ☐ Yes (if yes please attach)

Programming Options Available at Resident Board (select all that are applicable):

_____ regular classroom with accommodations	_____ congregated* class with accommodations
_____ regular classroom no accommodations	_____ congregated class with no accommodations
_____ regular classroom with IPP / ISP	_____ congregated class with IPP / ISP
_____ regular classroom no IPP / ISP	_____ congregated class with no IPP/ISP
_____ Other (please describe)	

*A congregated classroom is a special educational setting for students with similar learning needs or characteristics.

Notes (including parent notice to Resident Board of intention to move child/student to a DSEPS):

We the undersigned confirm that consultation took place and understand the options available to our child/student.

Parent Signature

Board Representative**

Position

Date

** Board representative must be the Principal or Special Education Coordinator for the school.

Please refer to section 3.2 of the Funding Manual for School Authorities for further information

Supernet Service Funding Application 2019/20 School Year

School Authority Name: _____

School 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

Date

Approved By:

TLB

Date

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Education Program in an Institution (EPI) Funding Application Form 2018/19 School Year

School Authority Name: _____ Code: _____

Contact Person: _____ Telephone: _____

Please complete the same form for both budget and actual submission. The budget submission was 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 in 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

For 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 2019/20 School Year

School Authority Name: _____ Code: _____

Contact Person: _____ Telephone: _____

Please complete the same form for both budget and actual submission. The budget submission was due April 30, 2019. 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, 2020.

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 4(7)(b) of the *Education Act* (Statutes of Alberta, 2012), or are day students as defined in 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

For Department Use Only:

Total Program Costs \$ _____

Performance Certifier

Date

Total Net Program Costs \$ _____

Expenditure Officer

Date

Regular EPI Program Final Costs 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.

1 Instructional Salary Costs

FTEs

- 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) $\$500 \times$ 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.

Regular EPI Program

Budget

2019/20

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.

1 Instructional Salary Costs

FTEs

- 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. **One-Time Transition**

- 3. **Equity of Opportunity** (per student component only)
- 4. **Inclusive Education** (supports and services and per student alloc)

\$0.00

\$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:

\$0.00

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.

EPI Mixed Program

Final Costs

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.

1 Instructional Salary Costs

FTEs

- 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.

EPI Mixed Program Budget 2019/20

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.

1 Instructional Salary Costs

FTEs

- 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. One-Time Transition**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.

Fort McMurray Allowance FTE Calculation Form 2019/20 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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IMR EXPENDITURE PLAN & CAPITALIZATION SUMMARY

FORM 19AE8.2

JURISDICTION:
SCHOOL YEAR:

2019/2020

Approved IMR Allocation for Year Indicated:
Unapproved IMR Carryover at Aug 31 of previous year

Total Allocation Available :

Planned Expenditures from current year's budget - the current year's IMR Expenditure Plan Report must be attached and the numbers must match

A

Expenditures from current year's budget already closed within VFA at time of reporting- (the IMR Funding Final Cost Report for the current year must be attached and the numbers must match)

B

Miscellaneous maintenance items (total of small repair and maintenance items anticipated to be spent from current year's budget)

C

Total of Current Year's Anticipated IMR expenditures from total available allocation

A+B+C=D

0

Planned IMR Contingency

E

Remaining IMR Funds - not currently committed

F

0

Capitalizable Events in Current Year's Plan- the current year's IMR Capitalization Report must be attached and the numbers must match

G

Capitalized Events expended from Current Year's budget and already closed in VFA- the interim IMR Funding Final Cost Report must be attached and the capitalized items highlighted

H

Less: Capitalized Events in Current Year's Plan that were already reported for capitalization from previous year's funding allocations

I

Capitalizable Events Planned for Future Years from 2019/2020 IMR allocation - details of each event are required(add additional rows to the table if required)

Site Name	Asset Name	System	Brief Description	Category	Priority	Planned Action Year	Planned Cost for Future Capitalization	Implementation Notes

Total of Capitalized costs from current year's budget that will be incurred in future years

0

J

0

Total Planned Capitalization of IMR Expenditures attributable to the current year's allocation

(G+H+J)-I

0

Reported capitalization amount does not meet required criteria

ERROR

Please provide an explanation for any large carry-forward amount and the plans you have for these funds.

Secretary-Treasurer or Designate signing this document

Print Name

Date:

* Costs include non-refundable G.S.T (1.6%) and exclude refundable GST (3.4%)

Queries: North Region - Travis Hovland @ 780-643-0736 / Travis.Hovland@gov.ab.ca

South Region - Erin Owens @ (780) 643-1455 / Erin.Owens@gov.ab.ca

Submission: A copy of this Excel Summary, along with a copy of the signed PDF version of this file and the detailed Excel backup files are to be emailed to: edc.cpdata@gov.ab.ca by November 30th

Review by Capital Planning

I have reviewed the Expenditure Plan and Capitalization Summary above and the supporting reports that provide details of the planned IMR expenditures for the year. The planned items comply with the stated purpose of IMR funding as outlined in Appendix F of the School Capital Manual and are for supported, government owned facilities.

Name of Reviewer _____

Date of Sign Off _____

Review by Financial Reporting and Accountability

I have reviewed the Capitalization Summary above and the detailed reports itemizing the events intended for capitalization from the current year's allocation. I concur that the items meet the stated criteria of our branch and authorize Capital Planning to communicate our acceptance of this plan to the jurisdiction.

Name of Reviewer _____

Date of Sign Off _____

Date Confirmation Email was
sent to the jurisdiction _____

Sent by: _____

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 29(2) of the *Education 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 17 and/or 19(1)(a) of the *Education 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 3(a)(b)(c) of the *Education Act*;
2. has a **parent** who ordinarily resides in Canada 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 21(1) of the *Education 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 26(3) of the *Education Act*.

Charter School

A **school** established under section 25 of the *Education Act* and operated per section 26 of the *Education 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:

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

Declaration of Management

Form 19AE1.2c 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 10 of the *Education 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 Jurisdiction	Schools
The Black Gold School Division (2245)	- East Elementary School (3214) - Ecole Bellevue School (3201)
The Calgary School Division (3030)	- James Short Memorial School (9364)
The Edmonton School Division (3020)	- Beacon Heights School (7106) - Duggan School (7218) - Elmwood School (7204) - Evansdale School (7215) - Hazeldean School (7132) - Hillview School (7255) - John Barnett School (7214) - Mayfield School (7209) - Scott Robertson School (7171) - Tevie Miller Heritage School Program (7772)
The Elk Island School Division (2195)	- A.L. Horton Elementary (3611) - Ardrossan Elementary (3303) - Ecole Parc Elementaire (1753) - Lamont Elementary (3405) - Mundare School (3406) - Pine Street Elementary (3326)
The Grande Prairie School Division (3240)	- Crystal Park School (1150)
The Greater St. Albert Roman Catholic Separate School Division (4077)	- Vital Grandin Catholic School (2578)

School Jurisdiction	Schools
The Medicine Hat School Division (3050)	- Dr. Ken Sauer School (2142) - Elm Street School (6848) - Herald School (6849)
The Northern Lights School Division (1245)	- Vera M. Welsh Elementary School (2704)
The Parkland School Division (2305)	- Ecole Broxton Park School (2228)
The Wetaskiwin School Division (2115)	- Early Education & Family Wellness Centre

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 Family Services (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 Society (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 Society (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)	- 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 *Education 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 journeyman certificate. A **dual credit** course can be categorized as either **single enrolled** or **dual enrolled** for funding purposes.

Dual Credit 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 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.

Dual Enrolled Dual Credit

A **dual credit** dual enrolled 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 21 of the *Education 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** 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 11 of the *Education 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 59 of the *Education Act* and the *School Transportation Regulation* or required to be transported to and from **school** under section 59 of the *Education 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 or enhancement of an existing **First Nation Education Authority** to support the strengthening of on-reserve education in Alberta.

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 14 of the *Education Act*.

Francophone Regional Authority

A Regional Authority for a Region established by the **Minister** under section 129 of the *Education Act*.

French as a Second Language (FSL)

A program or course offered under sections 17 and 19 of the *Education Act*.

Francophone Education

An education program offered under section 14 of the *Education 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 schools**, **private ECS operators**, Home Education programs, print-based distance education programs (Code 621), **online learning 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** that has been approved for funding by the School Finance Branch;
2. meets the minimum age requirements as set out in the following table*:

REVISED

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 8 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 8 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:

REVISED

- 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 **education services agreement** 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
The Aspen View School Division (2125)	- Night Wind, Kihew House School (1920)
The Battle River School Division (2285)	- Camrose Women's Shelter (4554)
The Calgary School Division (3030)	- Adolescent Day Treatment Program (1749) - Dr. Gordon Townsend School (9886) - West View School (9687) - Enviro's 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)
The Chinook's Edge School Division (0053)	- Equinox Group Home (1453) - Grimmon House (1058)
The Edmonton Catholic Separate School Division (0110)	- Alberta Health Services Intensive Day Treatment Youth Program (1576) - Alberta Health Services Youth Residential Treatment Centre (1174)

School authorities Approved to Provide an Educational Program in an Institution (EPI) for this school year	
The Edmonton School Division (3020)	- Hospital School Campuses (7701) - CASA House School (7701) - Glenrose School (7701) - Royal Alexandra School (7701) - Stollery School (7701) - Institutional Service Schools (7706) - Attendance Centre (7706) - Highwood School (7706) - Howard House School (7706) - Kennedale School (7706) - Rite Trak School (7706) - Yellowhead School (7706) - Rosecrest School (7729) - WIN House
The Elk Island School Division (2195)	- A Safe Place (3343) - Elk Island Youth Ranch Learning Centre (1599)
The Holy Family Catholic Separate School Division (0021)	- St. Francis Holistic Learning Centre (1619)
The Lakeland Roman Catholic Separate School Division (4105)	- Dr. Margaret Savage Centre School (2916)
The Lethbridge School Division (3040)	- Harbour House School (6459) - Lethbridge Regional Hospital School (6453) - Pitawani School (6456) - Stafford Ridge School (1380)
The Medicine Hat School Division	- PAS (6864)
The Northern Lights School Division	- Youth Assessment Centre (2716)
The Parkland School Division (2305)	- Bright Bank Academy (1321)
The Peace Wapiti School Division	- Horizon Group Care (1055)
The Red Deer School Division (3070)	- Direwood Treatment Centre (4461) - Oskayak Treatment Centre (4469) - Parkland Youth Homes (4464) - Red Deer Regional Hospital Education Program (0574) - Youth Assessment Centre (4457)
The St. Paul School Division (2185)	- Columbus House of Hope (1741)
The Sturgeon School Division (1110)	- Oak Hill School (2509)
Unlimited Potential Community Services Society (9272)	- Columbus Academy (0577) - Phoenix Academy (0028) - Thomas More Academy (0483)
The Wild Rose School Division (1325)	- Kootenay School (4111)
The Wolf Creek School Division (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**.

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 Learning Program

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 learning 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(r) and 2 of the *Education 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 29 of the *Education 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 3 of the *Education Act* and who is a **resident student** as determined under section 4 of the *Education Act*.

Resident Student of the Government

A student as defined in section 4(7) of the *Education 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 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 division**, **Francophone Regional Authority**, **charter school**, the Lloydminster Public School Division, or the Lloydminster Roman Catholic Separate School Division.

Schools of Choice

Refers to **schools** that are chosen because of the type of program being offered. Such as, Outreach schools, Hockey/Dance schools, Home Education schools, Religious Education schools, Online schools, Hutterite Colony schools, Language/Cultural schools, **designated special education private schools**, 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 139) of the *Education 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.

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 *Education 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.

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 *Education 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 13 of the *Education 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.