

Funding Manual for School Authorities 2020/21 School Year



For school jurisdictions, accredited funded private schools and private ECS operators with children/students in ECS to grade 12

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The primary audience for this resource is

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

This resource is available on the Alberta Open Government website at

<https://open.alberta.ca/publications/1485-5542>

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 2020/21 School Year

This manual is issued under authority of the following:

- *Education Act*, Statutes of Alberta, 2012, Chapter E-0.3;
- *Fiscal Planning and Transparency Act*, Section 10;
- *Alberta School Foundation Fund Regulation* (AR250/1996);
- *Government Organization Act*, RSA 2000, Chapter G-10, Section 13;
- *Education Grants Regulation* (AR120/2008), Sections 2 and 7; and,
- *Private Schools Regulation* (93/2019), Sections 16 and 19.

(Original copy is signed)
Deputy Minister of Education

Date

Message from the Deputy Minister

It is my pleasure to provide you with the all-new Funding Manual containing both the Funding and Assurance Framework for School Authorities for the 2020/21 school year.

Education system funding now amounts to over \$8 billion dollars annually for 700,000 students. In this time of fiscal restraint, it is essential that we prudently allocate funding and provide assurance to Albertans that the education system is meeting the needs of all students.

In September 2019, Adriana LaGrange, Minister of Education, announced an Assurance and Funding Review to respond to government commitments on education funding, the recommendations of the Blue Ribbon Panel on Alberta's Finances, and previous recommendations from the Auditor General. Taking all of these commitments and recommendations into consideration, Alberta Education set out to create a new model that:

- **Increases** the share of funding going into classrooms;
- **Contains cost growth;**
- **Predictably allocates funds;**
- **Assures the long-term viability of rural schools;**
- **Improves key performance** data available to parents; and
- **Fosters** collaboration between school authorities to realize economies-of-scale, create centers of excellence and encourage best practices.

The Funding and Assurance Framework detailed in this manual is the product of intensive work by Alberta Education staff and invaluable input from school authorities across Alberta over the past six months. Education staff met with all 63 public, separate and Francophone school jurisdictions (including Lloydminster), all charter schools and a broad range of education partners, travelling over 11,000 kilometers to gather essential feedback.

We heard that reforming the 2004 Renewed Funding Framework was urgently needed, and that the number of grants within the framework (and associated red tape) should be reduced. We also heard about the importance of flexible, stable, and predictable funding to enable local planning and decision-making. We know that school authorities' understanding of the local context and close interaction with students positions you to support student success, and we designed this model to provide the funding and information you need to move forward with confidence.

School authorities also indicated a strong interest in expanding the Assurance Model Pilot that was used in select jurisdictions since the 2014/15 school year. School authorities noted the alignment between the principles noted above, and the pilot's emphasis on increased flexibility and local stakeholder engagement.

The new transformative approach to funding and providing assurance within the education system is comprised of three primary elements:

- **A New Approach to Enrolment:** The annual student count is the basis for nearly every major education system grant. Shifting to a Weighted Moving Average (WMA) that captures the number of students across three school years will:
 - Enable school boards to plan and budget with confidence, rather than waiting for student counts to be established after the school year has already begun; and
 - Maintain the overall funding envelope established in Budget 2019 until 2023/24.

- **Streamlining and Reducing Red Tape:** Streamlining the current 36 grants into 15 will reduce duplication, increase local flexibility, simplify planning/reporting and direct funding to the classroom. This model also provides the impetus to school boards for further collaboration and other shared services.
- **Assurance for Albertans:** Assurance is a broad concept that encompasses accountability, engagement, transparency and reporting. It means demonstrating to Albertans that the education system is meeting student needs and that students are successful. A new assurance model implemented alongside funding changes will create new opportunities for parents to engage with education system governors and help shape local priorities and initiatives.
 - The development of this model would not have been possible without the jurisdictions that participated in the Assurance Model Pilot, and I want to thank everyone who contributed to the foundational efforts upon which our current efforts are built.

For the first time ever, school authorities will be provided with funding commitment letters and finalized funding profiles in spring 2020 for the upcoming school year. I would encourage you to work closely with Alberta Education staff to review your profile and this manual to develop a thorough understanding of how your school authority will be funded for the year ahead.

If you have any questions about how funding is allocated under the new model, please contact Daimen Tan, Director, School Finance Branch at 780 422-0865 or daimen.tan@gov.ab.ca or George Lee, Director, Funding Analysis Branch at 780 415-8325 or george.lee@gov.ab.ca and department staff will work diligently with you to resolve any issues prior to the start of the school year. Alberta Education will seek to maintain the integrity and streamlined nature of the model, while swiftly addressing any loopholes, inequities or unintended consequences.

I want to take this opportunity to thank you again for your contributions to this transformative new model for our education system. I am looking forward to continued collaborative efforts to foster student success in our education system.

Sincerely,

(Original Signed)

Andre Corbould

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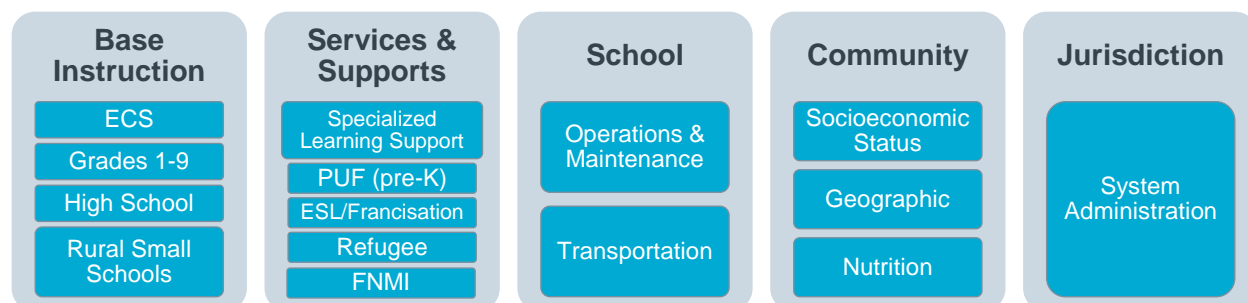
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Section A – Executive Summary

The new funding model consists of 15 major grant allocations as outlined in the following diagram. In some instances, sub-grants are contained within the allocations.



Base Instruction

Base instruction allocates funding equitably to ensure that every school in Alberta has adequate resources to deliver basic instructional programming regardless of location.

ECS and Grades 1-9

- Base instruction funding for Early Childhood Services (ECS) and Grades 1-9 will be allocated using the Weighted Moving Average (WMA) enrolment of the school authority.

High School (Grades 10-12)

- High school programming will be allocated using the WMA enrolment of the school authority, using a base rate that is 10 per cent higher than the Grade 1-9 base rate to account for the increased cost of high school programming.
- Credit Enrolment Units (CEUs) will no longer be the basis for funding high school programming, with the exception of summer school.
- The Carnegie Unit will no longer be used as a metric of student learning for funding purposes.

Rural Small Schools Grant

- The Rural Small Schools Grant recognizes that rural schools face unique challenges in the operation of schools and the delivery of educational services under any funding model based on student enrolment.
- Many small rural schools are unable to realize economies of scale on staffing and other expenses, and are disproportionately affected by fluctuations in student enrolment.
- This grant is allocated based on various enrolment thresholds for schools between 35 and 155 students, with a separate approach for colony schools.
- Schools with more than 155 students are not eligible for Rural Small Schools funding. Schools with fewer than 35 students will receive a small base amount plus base instruction funding based on WMA enrolment.

Services & Supports

Grants in the Services and Supports category are intended to support specialized learning needs or groups of students who may require additional supports from school authorities. Grants within this category have been streamlined significantly to provide school authorities with the flexibility to align these supports with local needs and context.

Specialized Learning Support

- The Specialized Learning Support Grant for Kindergarten to Grade 12 recognizes that every child and student is unique and develops the foundational competencies differently. This grant supports school boards in the provision of a continuum of supports and services to meet the learning needs of children and students within an inclusive learning environment.
- This grant is made up three allocations:
 - **Multi-Disciplinary Supports:** to support multi-disciplinary practice between teachers, educational assistants and other professionals in support of inclusive education.
 - **Jurisdiction Composition:** to address inclusive learning needs that may vary between school jurisdictions.
 - **Student Wellness Program:** to support capacity in school authorities to offer student wellness supports to improve educational outcomes of all students.
- The SLS Support Grant includes funding for kindergarten children with severe disabilities and severe language delay.

Program Unit Funding (PUF)

- PUF will continue to be allocated to support pre-Kindergarten (pre-K) children with severe disabilities and severe language delay.
- Funding will be allocated using the three-year WMA enrolment of children ages 2 years 8 months to 4 years 8 months who have been assessed and diagnosed with a severe disability or a severe language delay.
 - Accredited Funded, Private Schools and Private ECS Operators will continue to receive PUF funding for a maximum of three years.
- The new funding model establishes two tiers of funding based on hours of instruction for pre-K children to ensure funding is provided based on need.

English as a Second Language (ESL)/Francisation

- ESL and Francisation funding will continue to be allocated to school jurisdictions based on assessments conducted by schools and using the WMA of ESL/Francisation student counts.
- Once a student is assessed as requiring additional language support and included in the WMA enrolment for this grant, up to five years of ESL/Francisation funding will be provided.

Refugee Student Grant

- The Refugee Student Grant is allocated to school authorities to provide additional language, social and educational supports to refugee students.
- The Refugee Student Grant will be allocated based on a WMA of the number of students presenting documentation from Immigration, Refugees and Citizenship Canada that confirms refugee status.
- Once a student is identified as a refugee and included in the WMA enrolment for this grant, up to five years of Refugee Student Grant funding will be provided.

First Nations, Métis and Inuit

- Funding is allocated as a part of the model to assist school authorities in providing system, program and instructional supports that improve education outcomes for First Nations, Métis and Inuit students. The grant is comprised of three components:
 - A proportional allocation, based on overall student population, to acknowledge recommendations made by the Truth and Reconciliation Commission and to support related activities.
 - A component based on self-identified student enrollment to address student needs through program and instructional supports.
 - A component based on both census and self-identification data to address the systemic education gap.

School

These grants address system needs at the school-level.

Operations and Maintenance (Targeted)

- The Operations and Maintenance (O&M) Grant is targeted funding to ensure safe and well-maintained schools for students.
- The O&M Grant is allocated using a new formula that includes Weighted Moving Average enrolment funding as well as considerations for utilized space and under-utilized space.
- Amounts can be transferred into O&M from other grants, but school authorities may not reallocate targeted O&M funding for other costs.
- SuperNet Service Funding is continued as a sub-grant in this category.

Transportation

- The Transportation Grant will extend the current model pending the development and implementation of a new model.
- Funding in 2020/21 will be held constant based on allocations provided under the 2019/20 model, with two years of supplemental funding being allocated to school authorities' proportional to their Transportation Allocation for 2019/20, in recognition of additional cost increases that may occur while a new model is developed and implemented.

Community

These grants are designed to address socio-economic contexts and geographic locations which pose unique challenges to the operation of schools and delivery of educational services.

Socioeconomic Status

- The Socioeconomic Status Grant will be allocated based on the following factors in each school authority (using Statistics Canada 2016 census data): mother's education, lone parent households, home ownership, average income and parents' post-secondary education.

Geographic

- The Geographic Grant will be allocated based a number of variables for each school authority, including rurality, sparsity-distance, and northern location factors, as well as the size of the rural area served by the school jurisdiction.

Nutrition

- Funding for nutrition programming will continue with a new allocation based on WMA enrolment and Socioeconomic Status Index for each school authority.

Jurisdiction

System Administration Grant (Targeted)

- The System Administration Grant is targeted funding to cover governance (board of trustees) and school authority central administration costs. The amount will be fixed over the next three school years.
- Each school authority is provided with an authority-specific targeted grant amount ranging from 3.15 per cent to 4.95 per cent of total operating expenditures, based on August 31, 2019 Audited Financial Statements. This percentage varies based on WMA enrolment in recognition of the economies of scale in system administration costs for larger jurisdictions.
- Amounts can be transferred from the System Administration Grant to other grants, but school authorities may not spend funds from other grants on system administration.

Requirements for School Authority Planning and Results Reporting

- A new Assurance Framework is included as a part of this manual, articulated through the revised **Requirements for School Authority Planning and Results Reporting (Section K)**.
- The new Assurance Framework builds on the strengths of the current accountability framework (including the Accountability Pillar), while integrating elements arising from the Assurance Pilot process initiated in 2014/15, input from education partners, and the same Assurance and Funding Review that informed the funding model.
- School authorities will continue to develop Education Plans and Annual Education Results Reports that identify key priorities and improvement areas and report on results through a core set of provincial measures that will enable the government and Albertans to assess the operation of the education system.
- The new Assurance Framework provides increased flexibility to school authorities to design Education Plans and Annual Education Results Reports, while requiring strong engagement processes with local stakeholders.
- The framework is designed to align with education system roles and responsibilities articulated by the *Education Act*, and supports accountability, transparency and continuous improvement.
- Please refer any questions on the Assurance Framework to Anthony Warren, Senior Manager, School Authority Accountability at anthony.warren@gov.ab.ca or 780-422-4750.

Section B – Assurance Framework

Accountability and Assurance in Alberta's K-12 Education System

The priority of the K-12 education system is the success of every child in school. Educating Alberta students is the responsibility of the provincial government and is governed by the *Education Act*. Subject to the provisions of the Education Act, education is delivered by a system of schools operated by school authorities. For the purposes of this section, school authorities are school boards, charter schools and accredited funded private school operators. Each type of school authority is accountable for assuring the quality of education for its students, while the Department of Education¹ is responsible for assuring the quality of education provided by school authorities.

In Alberta's K-12 education system, school authorities are accountable organizations. The Department of Education allocates funds to school authorities so they may fulfill their delegated responsibilities of providing education programs for Alberta's K-12 students. This practice creates an accountability relationship between the department and the school authorities which requires transparency and the obligation to answer for, and publicly report on the spending of public funds and results achieved by the accountable organization through the discharge of responsibilities. This accountability relationship is established in legislation and regulation.

In addition to the department, school authorities are also responsible for providing assurance to their local stakeholders and the public that they are fulfilling their responsibilities and students are successful. This assurance arises from the combination of policies, processes, actions and evidence that help build public confidence in the education system. It is achieved through relationship building, engagement with education partners and by creating and sustaining a culture of continuous improvement and collective responsibility.

Legislative Authority

The following pieces of legislation and regulation dictate the responsibilities of school boards related to the accountability relationship with the Department of Education. Where the highlighted legislation references 'school boards', it also applies to charter schools as per Section 27 of the [Education Act](#).

- Section 10(2) of the [Fiscal Planning and Transparency Act](#) requires accountable organizations, including school boards, under the jurisdiction of government ministries to prepare business plans and annual reports for each fiscal year "in the form, at a time and containing the information, acceptable to the responsible Minister."
- Section 7 of the [Education Grants Regulation](#) under the [Government Organization Act](#) requires recipients of grants from the Department of Education to provide the Minister, upon request, any information the Minister considers necessary for the purpose of determining whether or not the recipient has complied or is complying with the conditions of the grant.
- Section 67 of the *Education Act* requires school boards to develop and implement a reporting and accountability system on any matter the Minister prescribes. It also requires schools boards, according to the manner the Minister prescribes, to use any information in reports and accounts under the reporting and accountability system and to disseminate this information to students, parents, electors or the Minister.
- Section 33 of the *Education Act* outlines key board responsibilities related to governance and student achievement. The list of responsibilities reflects a student-centered focus and the principles of inclusiveness, fairness, diversity and excellence. Engagement of parents, students, staff and other key stakeholders on board matters and plans contribute to shared governance.

¹ See Section L: Glossary

Fulfilling these responsibilities is central to school authority accountability and assurance in the education system.

- Section 139 of the *Education Act* outlines the expectations for financial reporting for school boards. Sub-section 2 requires that school boards annually prepare and submit to the Minister, a budget for the upcoming fiscal year on or before May 31; and, to submit to the Minister, in a form prescribed by the Minister, on or before November 30, copies of the board's financial statements, the auditor's report on the board's financial statements, and, any written communications between the board respecting the systems of internal control and accounting procedures of the board.
- Section 12(1) of the [School Councils Regulation](#) under the *Education Act* requires school boards to provide school councils with the opportunity to provide advice on the development of the school's foundational statements (vision, principles and beliefs); education plan; annual results report; and budget. Section 12(2) requires school boards to provide the school council with the results for the school from provincial assessments and an interpretation of those results as well as, the information that the board disseminates through its reporting and accountability system per Section 67 of the *Education Act*.

The responsibilities of accredited funded private school authorities related to the accountability relationship with the Department of Education are outlined in:

- Section 7 of the *Education Grants Regulation*, noted above;
- Section 16(1) of the [Private Schools Regulation](#), which requires operators of funded private schools to submit to the Minister, in a form prescribed by the Minister, on or before November 30, the audited financial statements of the funded private school, an auditor's report in a form prescribed by the Minister, and copies of any written communications between the auditor and the operator respecting the operator's internal control systems and accounting procedures. Sub-section 2 requires operators to annually submit to the Minister, in a form prescribed by the Minister, a budget for the upcoming fiscal year on or before May 31; and,
- Section 19 of the *Private Schools Regulation* under the *Education Act* that establishes the requirement for operators of accredited funded private schools to prepare an Education Plan and Annual Education Results Report as required by the Minister, with regard to financial reporting.

School Authority Accountability Policy

School authorities are accountable for results achieved from carrying out their responsibilities to provide education programs to Alberta students. As accountable organizations, school authorities are required to:

- Establish a system of accountability for results that encompasses their schools.
- Interpret and report results to parents, students, the Department of Education and the public in a manner and at a time the Minister prescribes as part of ensuring transparency.
- Use results to improve the quality and effectiveness of education programs provided to their students and to improve student learning and achievement.

Assurance Framework

Overview

Since the introduction of the current accountability framework, the education system has continued to evolve, as has the thinking about the best ways to support continuous improvement and to build public trust and confidence in the quality of education provided. Over the years, education partners have been engaged on how to enhance the current accountability framework within the context of system improvement and enhanced public confidence.

Through this work, it has become clear that our current approach to accountability must broaden to encompass both the relationship between school authorities and the department, as established in legislation and policy, and demonstrating to stakeholders and the public that the education system is meeting the needs of students.

A broader and more balanced approach to accountability will result in enhanced public assurance and is the basis of the Assurance Framework. In this framework, all education stakeholders accept responsibility for building capacity of the education system — in classrooms, schools, school authorities and in government. Ensuring continuous improvement throughout the system necessitates a collective approach that recognizes diversity within Alberta, relies on evidence to make decisions, and is responsive to the needs of students in their local contexts.

The Assurance Framework, developed collaboratively with education partners, outlines key guiding principles, domains and processes for enhancing public trust and confidence that the education system is meeting the needs of students and students are successful.

Guiding Principles for Assurance

The guiding principles below describe the ideals that all education partners must embrace to ensure sound and consistent decision-making in all areas assurance is provided. Public assurance providers:

- Recognize that all education partners, each with unique contributions, share responsibility for student growth and achievement;
- Build professional capacity and a commitment to continuous improvement;
- Facilitate communication and the ongoing engagement of all education partners in respectful collaborative action;
- Engage regularly with education partners, across the spectrum of public engagement strategies (informing, consulting, involving, collaborating and empowering)²;
- Acknowledge that communication must be a constant throughout the engagement process;
- Consistently use evidence from a variety of sources to ensure responsive and transparent decision-making;
- Reflect local and societal contexts, enabling innovative and flexible responses in classrooms, schools, school authorities and the government;
- Recognize the unique learning needs of students and foster equitable and inclusive learning environments;
- Commit to demonstrating fiscal responsibility and effective stewardship of resources in supporting system/student outcomes; and,
- Provide a structure to ensure that what is measured and reported is consistent with the best interests of student growth and achievement, and the goals of education in the province of Alberta.

² International Association of Public Participation (IAP2)

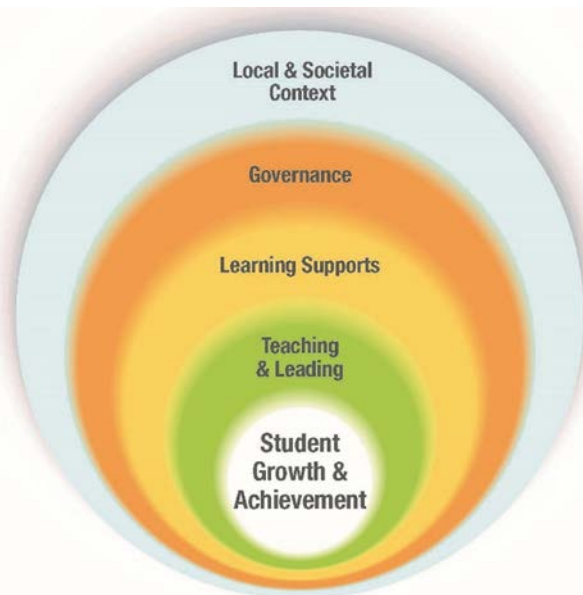
Assurance Domains

Assurance in the education system happens when community members, system stakeholders and education partners engage across five domains:

- Student Growth and Achievement;
- Teaching and Leading;
- Learning Supports;
- Governance; and,
- Local and Societal Context.

For the purposes of this document, a domain is an area of activity where education partners have specific responsibilities that they are accountable for and provide assurance about. Fundamentally, assurance is reflected in what the public understands, perceives and knows about student growth and achievement, where the quality of the daily interaction between teacher and student is paramount. Assuring the public that the education system is successfully supporting student growth and achievement requires engagement and thoughtful action across all five domains.

Student growth and achievement is the primary purpose of the education system and is the core outcome domain for the assurance framework. The domains of Teaching and Leading, Learning Supports and Governance support and enable Student Growth and Achievement. Local and Societal Context while a separate domain, operates across and is integrated into the others. For the purposes of description, the domains are considered discrete and separate. However, in practice, they overlap and are interconnected and interdependent, as depicted in the graphic below:



Each of the five domains is described below. The descriptions provide a succinct overview of each of the domains and help demonstrate how the domains are distinct yet interconnected. The “key elements” provide some important indicators of public assurance for each domain. The key elements are primarily illustrative and are provided to help those providing assurance (in classrooms, schools, school authorities and government) answer the question “What should be happening consistently in our education system to build public trust and confidence about the domain?”

Student Growth and Achievement

Student Growth and Achievement refers to the ongoing progress students make in their learning, relative to identified provincial learning outcomes and consistent with their needs, interests and aspirations.

Public assurance occurs when the public has trust and confidence that students demonstrate citizenship, engage intellectually and grow continuously as learners.

Key Elements:

- Students use ongoing assessment feedback to reflect continuously on their progress, identify strengths and areas of need and set new learning goals.
- Students achieve prescribed provincial learning outcomes, demonstrating strengths in literacy and numeracy.
- Students are active, healthy and well.
- Students apply knowledge, understanding and skills in real life contexts and situations.
- Students advance reconciliation by acquiring and applying foundational knowledge of First Nations, Métis and Inuit experiences.
- Students demonstrate understanding and respect for the uniqueness of all learners.

Teaching and Leading

Teaching and Leading refers to teachers and leaders analyzing the learning context; attending to local and societal considerations; and applying the appropriate knowledge and abilities to make decisions resulting in quality teaching, leading and optimum learning for all.

Public assurance occurs when the public has trust and confidence that certificated teachers and certificated leaders demonstrate their respective professional practice standards (Teaching Quality Standard, Leadership Quality Standard and Superintendent Leadership Quality Standard).

Key Elements:

- Teachers and leaders respond with skill and competence to the unique learning needs, interests and cultural, social and economic circumstances of all.
- Teachers and leaders improve their professional practice through collaborative engagement in processes of growth, supervision and evaluation.
- Collaboration amongst teachers, leaders, students and their families, and other professionals enables optimum learning.
- All teachers and leaders are accountable to a standard of professional conduct and a standard of professional practice.
- University teacher education, university leadership education and on-going professional learning programs prepare teachers and leaders to meet the standards for professional practice.
- Teachers and leaders use a range of data arising from their practice to inform cycles of evidence-based continuous learning.

Learning Supports

Learning Supports refers to the mobilization of resources (including expertise, facilities, human and community services) required to demonstrate shared, system-wide responsibility for all children and students, and the application of these resources to ensure quality teaching and leading and optimum learning for all.

Public assurance occurs when the public has confidence that resources are managed effectively in establishing learning environments where local and societal context is recognized, diversity is embraced, a sense of belonging is emphasized and all students are welcomed, cared for, respected and safe.

Key Elements:

- Learning environments are welcoming, caring, respectful and safe.
- Learning environments are adapted as necessary to meet learner needs, emphasizing a sense of belonging and high expectations for all.
- Education partners fulfil their respective roles with a shared understanding of an inclusive education system.
- Students and their families work in collaboration with education partners to support learning.
- The school community applies the resources needed to support First Nations, Métis and Inuit student achievement.
- Cross-ministry initiatives and wraparound services enhance conditions required for optimal learning.
- Infrastructure (e.g., technology and transportation services) supports learning and meets the needs of Alberta students and their families, staff and communities.

Governance

Governance refers to the processes by which policy leaders attend to local and societal context; determine strategic direction; evaluate policy implementation; and manage fiscal resources to ensure learning supports, quality teaching and leading and optimum learning for all.

Public assurance occurs when the public has trust and confidence that policy leaders demonstrate stewardship of system resources with an emphasis on student success, generative community engagement, transparency and accountability.

Key Elements:

- Governors engage students and their families, staff and community members in the creation and ongoing implementation of a shared vision for student success.
- Legislation, policy and regulation provides clarity regarding the roles and responsibilities of education partners in matters of governance.
- Fiscal resources are allocated and managed in the interests of ensuring student success, in alignment with system goals and priorities and in accordance with all statutory, regulatory and disclosure requirements.
- Curriculum is relevant, clearly articulated and designed for implementation within local contexts.
- Governors in school authorities and in government employ a cycle of evidence-based continuous improvement to inform ongoing planning and priority setting, and to build capacity.

Local and Societal Context

Local and Societal Context refers to the engagement practices of schools and communities, with support from the broader system, in identifying and responding to the learning needs, interests, aspirations and diverse cultural, social and economic circumstances of all students.

Public assurance occurs when the public has trust and confidence that the education system responds proactively to local and societal contexts.

Processes and practices than enable attending to local and society context are woven throughout each of the other four domains.

Key Elements:

- Education partners anticipate local and societal needs and circumstances and respond with flexibility and understanding.

Continuous Improvement Cycle

Successful work within and across the domains occurs within a continuous improvement cycle. There are a variety of approaches to improvement³ and some of the key components include:

- **Explore:** Involves accessing, analyzing and interpreting accurate and relevant data and, identifying and understanding an issue, concern or problem. Key question: What is going on here?
- **Develop:** Involves Identification of a problem or challenge that can be addressed; identification of potentially successful strategies to address learner-centered problem/challenge; and developing an action plan. Key question: What needs to be improved? How?
- **Take action:** Involves learning as you implement the plan and making adjustments through formative feedback. Key question: How are we 'actioning' the plan?
- **Evaluate:** Involves evaluating the impact of the plan. Key question: Did our planned strategies have the desired outcomes? Why? What next?

Key Enabling Processes for Continuous Improvement

Key enabling processes that must be part of all phases of a continuous improvement cycle (see graphic below) include:

Evidence-informed decision-making: In a continuous improvement cycle, participants are persistently attentive to gathering ongoing, triangulated evidence to inform next steps.

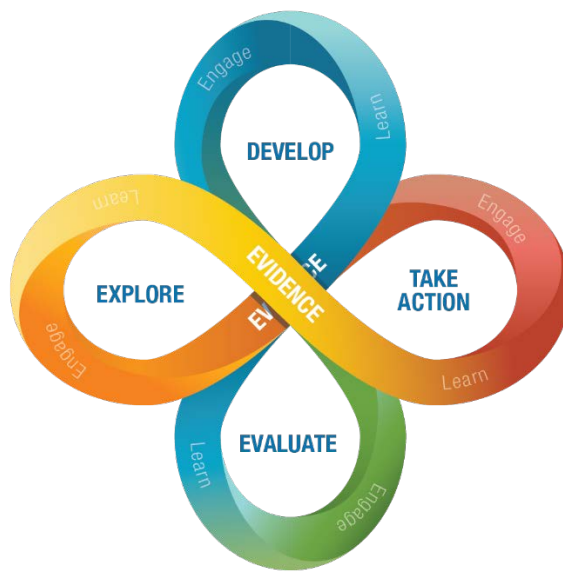
Engagement: Effective engagement processes rely on education partners working together for the purposes of bringing about positive change, with all partners recognizing that the nature of the engagement will vary according to the needs of the participants.

Learning and Capacity Building: In assurance, reflection on learning is critical. Because the provision of assurance is a dynamic process, the opportunities for building capacity for change and improvement must be ongoing.

³Education Review Office and the Ministry of Education, New Zealand Government, 2015, *Effective School Evaluation*. Retrieved from :<https://www.ero.govt.nz/assets/Uploads/Effective-School-Evaluation-web.pdf>

National Forum on Educational Statistics. (2012). *Forum Guide to Taking Action with Educational Data*. (NFES 2013-801). U.S. Department of Education. Washington, D.C: National Center for Educational Statistics. Retrieved from <http://nces.ed.gov/pubs2013/2013801.pdf>

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While the Assurance Framework is applicable to all education partners across the education system who provide public assurance based on their respective responsibilities, this document focuses primarily on school authorities and how they fulfill their responsibilities, demonstrate continuous improvement and provide assurance.

Section C – Funding for School Jurisdictions

C1 – Base Instruction Grants

C1.1 - Weighted Moving Average

Base instruction grants are allocated using the three-year **Weighted Moving Average** (WMA) enrolment of school authorities. Funding provided through the base instruction component does not allocate funding for specific **students** or schools. Rather, WMA enrolment is used to allocate funding for the Early Childhood Services (ECS)-Grade 12 instructional activities of the entire school jurisdiction. The three-year WMA enrolment is calculated as follows:

School Year	Weighted Factor	Enrolment Count (FTE)
2018/19	20%	Actual
2019/20	30%	Estimate
2020/21	50%	Projection

Example A: WMA calculation of a school jurisdiction with a growing **student** enrolment would be as follows:

School Year	Weighted Factor	Enrolment Count (FTE)
2018/19	20%	16,480
2019/20	30%	16,700
2020/21	50%	16,850
WMA Enrolment (FTE)	$(16,480 \times 20\% + 16,700 \times 30\% + 16,850 \times 50\%) = 16,731$	

Example B: WMA calculation of a school jurisdiction with a declining **student** enrolment would be as follows:

School Year	Weighted Factor	Enrolment Count (FTE)
2018/19	20%	5,460
2019/20	30%	5,400
2020/21	50%	5,350
WMA Enrolment (FTE)	$(5,460 \times 20\% + 5,400 \times 30\% + 5,350 \times 50\%) = 5,387$	

The projected enrolment count will be determined based on Alberta Education's calculations and input from school jurisdictions.

The projected enrolment count used in the calculation of WMA for the budgeted school year will be compared against the actual September 30th enrolment count in December of the school year. However, there will be no in-year adjustments if the projected count is different from the actual count. The difference between the projected count and actual **student** count will be accounted for in the calculation of WMA for the subsequent school year. If the projected count is higher than the actual count, the WMA for next year will be adjusted down, and if the projected count is lower, the WMA for next year will be adjusted up to account for the difference.

If a jurisdiction is not compliant with the rules outlined in the funding manual, the department will adjust the funding allocation for the following school year in accordance with the audit result.

An example is provided in the table below:

Example WMA Calculation				
	2018-2019	2019-2020	2020-2021	2021-2022
Actual count	16,480	16,700	16,800	
Projected count			16,850	16,876
WMA for 2020-2021 funding calculations (calculated in Feb 2020 using 2020-2021 projected count)			20%*16,480 + 30%*16,700 + 50%* 1,6850 = 16,731	
WMA verification for 2020-2021 (calculated in Dec 2020 using 2020-2021 actual count)			20%*16,480 + 30%*16,700 + 50%* 16,800 = 16,706	
WMA adjustment			16,731 – 16,706 = 25	
WMA for 2021-2022 (calculated in Feb 2021)				(20%*16,700 + 30%*16,800 + 50%*16,876) – 25 = 16,793

C1.2 – ECS to Grade 9 Base Instruction Grant

ECS to Grade 9 funding is allocated using the three-year Weighted Moving Average (WMA) enrolment of the school jurisdiction. This does not allocate funding for specific **students** or schools. Rather, WMA enrolment is used to allocate funding for these grades for the entire school jurisdiction.

Allocation Formula

$$\text{Weighted Moving Average (WMA) FTE Enrolment (applicable grade)} \\ \times \\ \text{Base Instruction Rate (applicable grade level rate)}^*$$

*Note: Schools eligible for the Rural Small Schools Grant will not receive any base instruction allocation. See **Section H** for the applicable grade level base instruction rate.

Allocation Criteria

1. A child who meets conditions a, b, c, and d unless e, f, g or h apply is counted toward WMA enrolment for the purposes of allocating ECS base instruction funding:
 - a. 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;
 - b. meets the minimum age requirements as set out in the following table:

Category of ECS Children	Type of ECS Funding Provided*	Minimum age of the child on September 1	Maximum age of the child on September 1
Kindergarten child	Base Instruction Funding (Maximum of 1 year funding)	4 years 8 months	Less than 6 years
ECS child with a mild/moderate disability/delay,	Base Instruction Funding (Maximum 2 years funding which includes the Kindergarten year)	3 years 8 months	Less than 6 years
ECS child who is gifted and talented	Base Instruction Funding (Maximum 2 years funding which includes the Kindergarten year)	3 years 8 months	Less than 6 years
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) and ESL/ Francisation Funding	3 years 8 months	Less than 6 years
ECS child with severe disabilities/delay	Base Instruction Funding (Maximum 3 years funding which includes the Kindergarten year) and PUF (Max years see Section C2.6, E2.3)	2 years 8 months	Less than 6 years
ECS child who is developmentally immature	Base Instruction Funding (Maximum 2 years funding)	4 years 8 months	Less than 7 years

*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.

- c. Is a resident of Alberta and has a **parent** who ordinarily resides in Alberta on the **September count date**;
- d. Is a Canadian citizen on the **September count date**; or
 - i. is lawfully admitted to Canada for permanent residence; or
 - ii. is a child of a Canadian citizen; or
 - iii. is a child of an individual who is lawfully admitted to Canada as a permanent or temporary resident; or
 - iv. is a 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
 - v. is a step-child of a Canadian citizen and is the biological or adopted child of the Canadian citizen's non-Canadian spouse or partner. The following documentation is required:

- vi. proof of application for permanent resident status and fee payment to Immigration, Refugees and Citizenship Canada (IRCC); or
 - vii. valid study permit for the child.
- e. For funding purposes, a **First Nations child who resides on a reserve** is not counted toward WMA enrolment.
 - f. An individual who is **developmentally immature** (code 10).
 - g. An individual who is at least 5 years 8 months but less than 7 years of age on September 1, and who is either coded severe or mild/moderate, gifted/talented, or ESL/Francisation, may be counted toward WMA enrolment 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.
 - h. An individual who is at least 4 years 8 months years of age, but less than 7 years old on September 1 may be counted toward WMA enrolment 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.
2. As per Section 21(2) of the *Education Act*, “a board may provide an early childhood services program to a **student** who, as of September 1, is younger than 7 years of age, if the parent of the **students** and the board are of the opinion that the program will benefit the student.” **Students** who are placed in the ECS program and have not yet accessed the maximum number of years of ECS programming that they are eligible to access, will be counted toward the WMA enrolment calculation for ECS. The students must have completed one year of Kindergarten to be considered developmental immature.
 3. **Children/students** with the primary registration as of September 30 at a school board will be counted toward the WMA enrolment calculation. Please refer to the Glossary for the definition of **primary registration** and **non-primary registration**.
 4. Base instruction funding for ECS is based on ECS Weighted Moving Average (WMA) enrolment of the school jurisdiction. ECS students would be counted one for the purpose of ECS Weighted Moving Average (WMA) enrolment count and ECS base instruction funding rate would be applied.
 5. Base instruction funding for Grade 1-9 is based on Grades 1-9 WMA enrolment of the school jurisdiction. Grade 1-9 students would be counted one for the purpose of Grade 1-9 Weighted Moving Average (WMA) enrolment and Grade 1-9 base instruction funding rate would be applied.
 6. ECS-Grade 12 **children/students** enrolled in schools that are eligible for the Rural Small Schools Grant are excluded from the WMA enrolment calculation for base instruction funding.
 7. School jurisdictions must provide each **child/student** during a school year with:
 - a. a minimum of 475 hours of ECS instruction (or a minimum of 400 hours for children identified as having severe disabilities or severe language delay); or,
 - b. a minimum of 950 hours of instruction for Grade 1-9.
 8. Any school jurisdiction providing less than 475 hours (or less than 400 hours for children identified as having severe disabilities or severe language delay) for ECS and 950 hours for Grade 1-9 will not receive funding for that programming.
 9. Under no circumstances can an individual be counted toward the WMA enrolment calculation for both ECS and Grade 1-9 in the same school year.

10. A **student** will be counted toward WMA enrolment for an academic program associated with an activity program offered in a Canadian province or territory outside of Alberta if:
- the **student** meets the criteria of a **student**;
 - the activity program is not offered in Alberta;
 - the **student** was selected by audition or another substantive selection method to be part of the program; and
 - a signed education services agreement has been submitted to School Finance Branch by November 15.

C1.3 – High School Base Instruction Grant

High school funding is allocated using the three-year **Weighted Moving Average (WMA)** enrolment of the school jurisdiction. This does not allocate funding for specific courses, **students** or schools. Rather, WMA enrolment of high school **students** is used to allocate funding for the high school program of the entire school jurisdiction. School jurisdictions remain responsible for determining which education programs, such as off-campus programming (which includes Career and Technology Studies, Work Experiences, Registered Apprenticeship Program (RAP), Dual Credit and Green Certificate courses), they will offer.

Allocation Formula

Students in their first, second, or third year of high school
Grade 10-12 WMA Enrolment × 100% of High School Base Rate

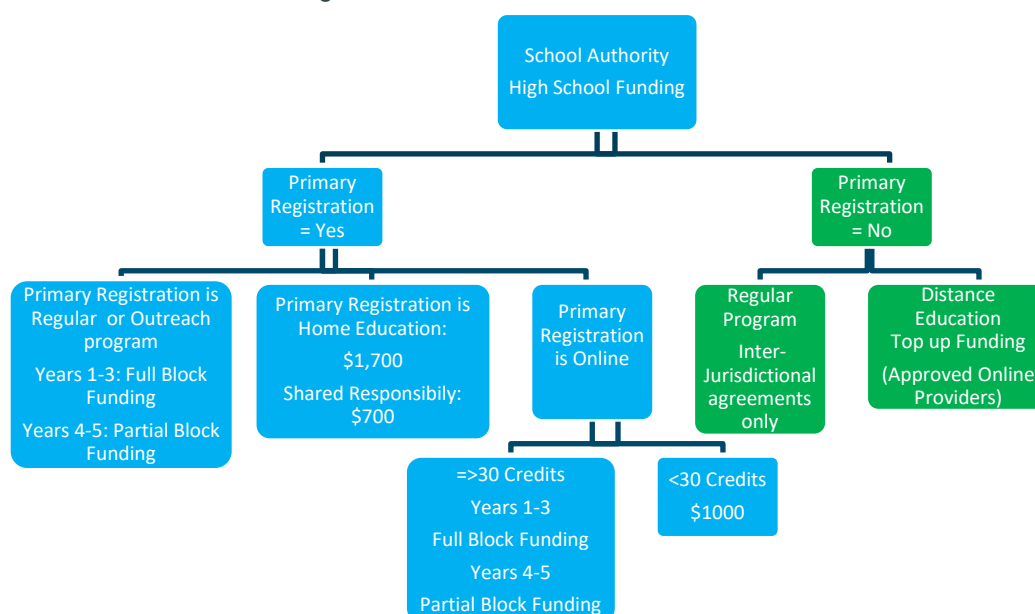
Students in their fourth year of high school
Grade 10-12 WMA Enrolment × 50 % of High School Base Rate

Students beyond their fourth year of high school
Grade 10-12 WMA Enrolment × 25 % of High School Base Rate

Allocation Criteria

- Students** in Grade 10-12 who are less than 20 years of age on September 1 will be counted toward the WMA enrolment calculation for this grant.
- School jurisdictions must provide **students** with a minimum of 1000 hours of instructional time for Grades 10-12.
- RAP, work experience and special projects courses must be 25 hours of instruction per credit, in accordance with the Guide to Education.
- Students** in Grade 10-12 attending outreach programs will be counted toward the WMA enrolment of the school jurisdiction.
- Students** in Grade 10-12 enrolled in schools that are eligible for the Rural Small Schools Grant are excluded from the WMA enrolment calculation for base instruction funding.
- High school **students** in an online program completing 30 or more credits are counted toward the WMA enrolment of the school jurisdiction.
- High school **students** in an online program completing fewer than 30 credits are counted toward the WMA enrolment for online students of the school jurisdiction. However, these students will be funded at a lower rate. Please refer to **Section H** of the manual for the applicable funding rate.
- Summer school funding is provided for up to 10 credits completed per student in the summer for high school courses. Please refer to **Section H** of the manual for funding rates per credit.

9. High school courses delivered to **students** must meet the conditions in The Guide to Education: ECS to Grade 12 and all other Alberta Education legislation, regulations and policies. The following decision tree will be used to determine high school funding levels with different types of registration under the new Funding and Assurance Framework:



C1.4 – Summer School Grant

The Summer School Grant supports school authorities offering summer school for **students** who require this form of educational choice.

Allocation Formula

$$\text{Summer School Base Rate} \times \text{Number of Completed Credits (Maximum 10)}$$

Allocation Criteria

1. Summer school funding is provided for up to 10 credits completed per **student** in the summer for high school courses.
2. Funding is provided on a credit basis for summer school high school courses as follows:
 - a. 16 hours for a 1 Credit Value 1 = 1
 - b. 48 hours for a 3 Credit Value 3 = 3
 - c. 80 hours for a 5 Credit Value 5 = 5
3. High school courses provided 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.
4. RAP, Work Experience and special projects courses are required to provide 25 hours per credit, in accordance with the Guide to Education.
5. Summer school funding will be calculated based on the average of last three school years **completed credits**. Example: For the 2020/21 school year, 2016/17, 2017/18 and 2018/19 school years summer course enrolment data is used for the funding calculation.

C1.5 – Distance Education Grant

The Distance Education Grant supports equitable access to quality programming through multiple providers of distance education (online and print-based) programs across the province. Funding provided through the Distance Education Grant does not allocate funding for specific **students** or schools. Rather, **Weighted Moving Average (WMA)** enrolment is used to allocate funding to distance education programs of the entire school jurisdiction for **students** with primary and non-primary registration.

Allocation Formula

Full-time Online Students with Primary Registration

The allocation formula for students with a full-time primary registration in an online learning or print-based distance education program is:

$$\begin{array}{c} \text{WMA Enrolment Online Students (30 online credits completed or higher for high} \\ \text{school students)} \\ \times \\ \text{High School Student Base Funding Rate} \end{array}$$

Weighted Moving Average (WMA) enrolment for online **students** will be calculated according to the methodology described in Section C1.1 of the manual.

Part-time Online Students with Primary Registration

The allocation formula for **students** with a part-time primary registration (< 30 credits) in an online learning or print-based distance education program is:

$$\begin{array}{c} \text{WMA Enrolment Online Students (fewer than 30 credits completed for high school} \\ \text{students)} \\ \times \\ \text{Part-Time Online Student Rate} \end{array}$$

Note: In the absence of credit completion data for online **students** for the current school year, Alberta Education will use the last three years of actual online enrolment data to calculate the WMA enrolment of online **students**.

Online Students with Non-Primary Registration:

School jurisdictions will receive funding for out-of-district online students including students registered with private and charter schools based on the following tiered allocation formula:

1. \$50,000 for 35 to 100 students
2. \$175,000 for 101 to 250 students
3. \$375,000 for 251 to 500 students
4. \$500,000 for 500+ **students**

Funding level is based on the last completed school year data. Example: For the 2020/21 school year, the last completed school year data is 2018/19.

Funding allocation for private and charter schools (no geographic district boundaries) will be based on non-primary **student** enrolments as per the tiered allocation for out-of-district **students** (see above).

Allocation Criteria

1. Year 1 (2020/21):

In Year 1, all school authorities providing an online learning and/or print-based distance education program will be eligible for the Distance Education funding allocation provided they meet the following criteria:

- a. Only **students** actively attending to their learning (as identified through Learning Management System data) will be counted in the calculation of the tiered allocation formula.
- b. **Students** enrolled in these programs must be identified through **student** enrolment code assignment 620 (online learning) and/or 621 (print-based distance education). In addition, **students** registered in distance education programs must be enrolled in course sections identified as online learning (VTL) and print-based distance education (DSL) in school **student** information systems.
- c. Schools providing online learning and print-based distance education programs as described in the Guide to Education must indicate their program offering(s) in the Provincial Education Directory (PED).

2. Year 2: (2021/2022):

In addition to the criteria specified in Year 1, school authorities will need to meet or exceed the following assurance measures to be approved by Alberta Education to be eligible for funding for online students with non-primary registration for year 2:

- a. Minimum course completion rate (TBD);
- b. Minimum PAT participation rate (TBD);
- c. Evidence of daily, scheduled, synchronous instruction must be demonstrated for **students** in Grades 1-9; and
- d. Willingness to share digital resources/courses with other school authorities at no cost.

Alberta Education will be working with education stakeholders to update the above criteria in the 2020/21 school year.

This grant would be allocated to approved online providers only. School authorities need to apply to Alberta Education for the approval of online programs for Non-primary out-of-district students.

Schools registering **students** concurrently in a distance education program retain responsibility for the oversight and provision of support for their **students** as the responsible school where the **student's** primary registration exists.

As of the 2020/21 school year, funding for the Francophone Distance Education Centre (CFED) is provided through the Distance Education Grant for francophone regional authorities.

C1.6 – Home Education and Shared Responsibility Grant

The Home Education Grant supports educational choice for **students** and parents. For each home education **student**, the school jurisdiction is provided 50 per cent of the funding to support the home education **student**, and 50 per cent of the funding is provided to the parent and/or guardian as reimbursement for instructional materials and services that support the instructional program at home. Furthermore, parents who submit receipts for at least 75% of eligible expenses will receive the entire \$850.00.

Allocation Formula

$$\begin{array}{c} \text{Number of Home Education Students Grade 1-12 (as of September 30th Enrolment)} \\ \times \\ \text{Home Education Rate} \end{array}$$

Allocation Criteria

3. Home Education funding will be calculated using September 30th enrolment of Home Education students.
4. 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**.
5. The **associate board** or **associate accredited funded private school** must provide the resident board information through PASI and Student Records. Resident boards are able to access their student list through the Funding Event System (FES).
6. Home education funding is provided to support the education of Alberta **students** from Grades 1-12.
7. Home education **students** and their parents must reside in Alberta on the September count date of the current school year.
8. Home education **students** in accredited funded private schools are not eligible for severe disabilities funding.
9. An **associate board** or **associate accredited funded private school** must offer to the parents of a home education **student** no less than 50 per cent of the home education funding for the purchase of instructional materials.
10. If parents decline or do not claim the parent portion of Home Education funding by August 31 of the school year for which the amount was provided, Alberta Education will recover the unclaimed/declined portion. Home Education funding to school authorities will be adjusted accordingly in the following school year.
11. School authorities will be required to provide information related to unclaimed/declined portion of the Home Education grant in the Audited Financial Statements (AFS).
12. Students that are coded as shared responsibility students and meet the program requirement outlined in The Guide to Education will be funded at the shared responsibility rate. Shared responsibility programs receive additional funding to address instructional costs.
13. School authorities that provide shared responsibility program may use some or all of the parents' 50 per cent funding to pay for the cost of these courses and required instructional materials.

C1.7 – Outreach Program Grant

The Outreach Program Grant provides funding to assist school boards to support the success of **students** with educational supports and services in addition to the programs of study. Various approaches are used to meet the individual needs of **students** and help **students** complete their high school diploma.

Allocation Formula

$$\text{School Jurisdictions with an Outreach Program} \times \$150,000$$

Allocation Criteria

1. Jurisdictions must have an outreach school code to receive outreach program funding.
2. The outreach school is required to comply with legislated requirements for the operation of a school.
3. Outreach programs do not need to be located in an approved off-site facility.
4. **Students** with their primary registration at an outreach program as of September 30 are counted in the WMA enrolment calculation for the school jurisdiction.

C1.8 – Rural Small Schools Grant

The Rural Small Schools Grant is designed to address challenges associated with operating small schools in rural Alberta. Rural small schools will be provided with a guaranteed block of funding to ensure that funding is predictable and sustainable.

Allocation Formula

Block Funding Rate per School (applicable group level rate)		
Groups	WMA Enrolment (FTE) Threshold	Block Funding Rate
Group 1	< 35 and Hutterite Colony Schools	\$25,000+Base Instruction Funding per WMA FTE
Group 2	=> 35 < 55	\$450,000
Group 3	=> 55 < 75	\$620,000
Group 4	=> 75 < 95	\$750,000
Group 5	=> 95 < 115	\$860,000
Group 6	=> 115 < 135	\$940,000
Group 7	=> 135 < 155	\$1,000,000

Allocation Criteria

1. Schools will be eligible for this grant if they meet the following rules:
 - a. Schools located in rural areas or small population centers (with a population below 30,000) as defined by Statistics Canada*.
 - b. **Weighted Moving Average (WMA)** Full Time Equivalent enrolment threshold for **students** attending the small school.

*Note: *See the Statistics Canada definition at the following link:*

<https://www12.statcan.gc.ca/census-recensement/2016/ref/dict/geo049a-eng.cfm>
2. Eligible rural small schools will receive block funding based on the historical three years trend of the WMA FTE enrolment threshold of the school.
3. If eligible rural small schools with WMA enrolment (FTE) between 155 to 165 **students** receive less base instruction funding for ECS to Grade 12 than the Group 7 rate of the Rural Small Schools Grant, the school jurisdiction will be provided with the difference in the subsequent school year (in addition to applicable funding for the next school year).

4. The following schools are not eligible for this grant:
- Outreach Schools
 - Online Schools / Online Learning Centers
 - Home-Based Programs
 - Alternative Programs
 - Other schools of choice

C2 – Services and Supports Grants

C2.1 - Specialized Learning Support (SLS) Grant

The Specialized Learning Support (SLS) Grant provides additional funding for the entire school jurisdiction to provide a continuum of supports and services to **students** in an inclusive learning environment. School authorities are responsible for ensuring their SLS funding is disbursed based on **student** needs related to supports required for learning.

SLS funding is comprised of three allocations:

- Multi-Disciplinary Supports (MDS) Allocation
- Jurisdiction Composition Allocation
- Student Wellness Program Allocation

Allocation Formulas

I. Multi-Disciplinary Supports (MDS) Allocation

Funding is provided for multi-disciplinary supports for all school jurisdictions, which will help to build capacity and support for specialized assessment, while helping teachers, educational assistants, and other professionals better understand and adapt to the unique needs of their **students**. The MDS allocation is calculated as follows:

$$\begin{aligned} &\text{Base Allocation: } \$5000 \times \text{WMA FTE enrolment}^{0.660} \\ &+ \\ &\text{WMA FTE Student Allocation: } \$425 \times \text{WMA FTE Enrolment} \end{aligned}$$

II. Jurisdiction Composition Allocation

Funding is provided to address the diverse needs of the classrooms among school jurisdictions. The Jurisdiction Composition element will be allocated using the school jurisdiction's composition factor. This factor is calculated using the following data:

- Immigrant population by school authorities (Data Source: Statistics Canada 2016 Census)
- Number of families receiving Family Support for Children with Disabilities (FSCD) by school authorities. (Data Source: Ministry of Community & Social Services)

The factor will determine the percentage of the provincial total allocated for each school jurisdiction.

III. Student Wellness Program Allocation:

Student wellness can affect classroom learning and social interactions, both of which are critical to the success of **students**. Funding is provided to create capacity in school jurisdictions to offer student wellness programs, which will help to improve educational outcomes of all schools. Student Wellness Program funding will be allocated as follows:

$$\begin{array}{c} \text{Base Allocation } \$5000 \times \text{WMA FTE enrolment}^{0.45} \\ + \\ \text{School Jurisdiction's Proportional Share of the WMA FTE Enrolment} \end{array}$$

Note: School jurisdictions' Specialized Learning Support (SLS) Grant allocation amounts and grant calculation sheets will be available in the Alberta Education Stakeholder File Exchange site.

Allocation Criteria

1. School jurisdictions are eligible for funding under all three components in this section.
2. Funding allocation is based on the WMA FTE enrolment. For the purposes of calculating WMA FTE enrolment, Grade ECS students are counted as 0.5 and Gr 1-12 students are counted as 1.
3. Accredited funded private schools and private Early Childhood Services (ECS) operators are not eligible to receive Specialized Learning Support Grant.

Charter Schools

SLS funding for Charter Schools is comprised of three allocations:

- I. Multi-Disciplinary Supports (MDS) Allocation
- II. Jurisdiction Composition Allocation
- III. Student Wellness Program Allocation

Allocation Formulas

I. Multi-Disciplinary Supports (MDS) Allocation:

$$\begin{array}{c} \text{Base Allocation } \$2500 \times \text{WMA FTE enrolment}^{0.330} \\ + \\ \text{WMA FTE Student Allocation } (\$212.50 \times \text{WMA FTE Enrolment}) \end{array}$$

II. Jurisdiction Composition Allocation

The Jurisdiction Composition element will be allocated using the Charter Schools composition factor. This factor is calculated using the following data:

1. Immigrant population by school authorities (Data Source: Statistics Canada 2016 Census)
2. Number of families receiving Family Support for Children with Disabilities (FSCD) by school authorities. (Data Source: Ministry of Community & Social Services)

The factor will determine the percentage of the total allocated for each charter schools.

III. Student Wellness Program Allocation:

Student Wellness Program funding will be allocated as follows:

$$\begin{array}{c} \text{Base Allocation } \$2500 \times \text{WMA FTE enrolment}^{0.230} \\ + \\ \text{Charter's Proportional Share of Total Charter WMA FTE Enrolment} \end{array}$$

Note: Charter Schools Specialized Learning Support (SLS) Grant allocation amounts and grant calculation sheets will be available in the Alberta Education Stakeholder File Exchange site.

Allocation Criteria

1. Charter schools will be given an option to be funded under the “SLS Grant for Charter Schools”. This funding option will be in effect to the end of the 2022/2023 school year.
2. Funding allocation of SLS grant is based on the WMA FTE enrolment. For the purposes of calculating WMA FTE enrolment, ECS students are counted as 0.5 and Gr 1-12 students are counted as 1.
3. Funding will be provided to charter schools that choose to continue under the Severe Disabilities Funding Model.
4. Severe disabilities funding would be allocated based on the Weighted Moving Average (WMA) enrolment of students with severe disabilities.
5. Charter schools will use the severe disabilities categories and codes outlined in the Special Education Coding Criteria and the handbook for the identification. Severe disabilities funding will be based on approval of the **student’s** eligibility by the Learner Services Branch.
6. Charter schools will use the Severe Disabilities Funding (SDF) SharePoint Site to submit required documentation, locate resources and receive announcements about the severe disabilities funding application process and deadlines.
7. The eligibility of new **students** will be audited by the Learner Services Branch in the first year they are claimed for funding by 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 jurisdiction will require re-approval at the new school.

C2.2 – English as a Second Language (ESL) Grant

The English as a Second Language (ESL) Grant is provided to school jurisdictions for **children/students** who require additional support in the English language.

Allocation Formula

$$\begin{array}{c} \text{ESL WMA FTE enrolment} \\ \times \\ \text{ESL Rate} \end{array}$$

Allocation Criteria

1. Children/students who require additional English Language supports and instruction to achieve grade level expectations in English and other subject areas must be coded as either ESL-Funded Foreign born (code 301) or ESL-Funded Canadian born (code 303).
2. Documentation of an assessment, conducted within the past five years, must be kept on file at the school/school jurisdiction that supports the need for additional English language supports.
3. Funding allocation for ESL will be calculated based on the ESL Grant **Weighted Moving Average** (WMA) FTE enrolment.
4. The calculation of ESL grant WMA FTE will include **children/students** who meet the following criteria:
 - a. Aged at least 3 years 8 months as of September 1 of the school year;
 - b. Enrolled in a pre-K, Kindergarten or Grades 1-12 as an Alberta **student**;
 - c. Coded as either ESL-Funded Foreign born (code 301) or ESL-Funded Canadian born (code 303);
 - d. Not enrolled in home education, outreach, distance education or online programs; and
 - e. Has been included for five or fewer school years in the **Refugee Student** or ESL WMA FTE calculation.

5. **Children/students** included under PUF or Refugee Student Grants are not included in the ESL WMA FTE calculation;
6. **Children/students** will be included in the WMA FTE calculation up to a maximum of five years (including pre-kindergarten and kindergarten) for the **Refugee Student** and ESL grants combined (e.g., a **student** coded as ESL for Kindergarten would only be included in the WMA FTE calculation for the Refugee Student Grant for four years). The total of up to 5 years of funding is irrespective of any moves between school jurisdictions.
7. **Children** enrolled in pre-K and Kindergarten will be included as 0.5 FTE for ESL Grant WMA calculation.

C2.3 – Francisation Grant (Francophone Regional Authorities)

The Francisation grant is provided to Francophone Regional Authorities for **children/students** who require additional French language supports.

Allocation Formula

$$\begin{array}{c} \text{Francisation WMA FTE enrolment} \\ \times \\ \text{Francisation Rate} \end{array}$$

Allocation Criteria

1. The Francisation grant is available for Francophone Regional Authorities only.
2. Children/students who require additional French Language supports and instruction to achieve grade level expectations in Français and other subject areas must be coded as either Francisation-Funded Foreign born (code 307) or Francisation-Funded Canadian born (code 306).
3. Documentation of an assessment, conducted within the past five years, must be kept on file at the school/school jurisdiction that supports the need for additional French language supports. Funding allocation for the Francisation grant will be calculated based on the Francisation Grant Weighted Moving Average (WMA) FTE enrolment.
4. The calculation of Francisation-grant WMA FTE will include children/students who meet the following criteria:
 - a. Aged at least 3 years 8 months as of September 1 of the school year;
 - b. Enrolled in a pre-K, Kindergarten or Grades 1-12 as an Alberta **student**;
 - c. Coded as either Francisation-Funded Foreign born (code 307) or Francisation-Funded Canadian born (code 306);
 - d. Not enrolled in home education, outreach, distance education or online programs; and
 - e. Has been included for five or fewer school years in the **Refugee Student** or **Francisation** WMA FTE calculation.
5. Children/students included under PUF or Refugee Student Grants WMA FTE calculations will not be included in the Francisation WMA FTE calculation.
6. Children/students will be included in the WMA FTE calculation up to a maximum of five years (including pre-kindergarten and kindergarten) for the Refugee Student and Francisation grants combined (e.g., a student coded as Francisation for Kindergarten would only be included in the WMA FTE calculation for the Refugee Student Grant for four years). The total of up to 5 years of funding is irrespective of any moves between school jurisdictions.
7. A child/student may be included in both Francisation grant and ESL grant WMA FTE calculations.
8. Children/students enrolled in pre-K and Kindergarten will be included as 0.5 FTE for Francisation grant WMA calculation.

C2.4 – Refugee Student Grant

The **Refugee Student** Grant is allocated to school jurisdictions to provide additional language, social and educational supports to refugee students.

Allocation Formula

$$\begin{array}{c} \text{Refugee Student WMA FTE enrolment} \\ \times \\ \text{Refugee Student Rate} \end{array}$$

Allocation Criteria

1. **Students** who present approved refugee status from Immigration, Refugees and Citizenship Canada are considered in the allocation of this grant. School jurisdictions must code these **students** as **Refugee Students** (code 640). Refugee claimants cannot be coded 640 until they are approved as refugees by IRCC.
2. The **Refugee Student** Grant will be allocated based on the **Weighted Moving Average** (WMA) FTE enrolment of **refugee students**.
3. The calculation of **Refugee Student** grant WMA FTE will include the following **children/students**:
 - a. Aged at least 4 years 8 months as of September 1 of the school year;
 - b. Enrolled in Kindergarten or Grades 1-12 as an Alberta **student**;
 - c. Presents relevant documentation from Immigration, Refugees and Citizenship Canada and coded as **Refugee Students** (code 640);
 - d. Not enrolled in home education, outreach, distance education or online programs; and
 - e. Has been included for five or fewer school years in the **Refugee Student** or English as a Second Language (ESL)/Francisation WMA FTE calculation
4. Once a **child/student** is coded as a **Refugee Child/Student**, they will be included in the **Refugee Student** grant WMA FTE calculation for up to five consecutive years. **Children/students** will be included in the WMA FTE calculation for up to a maximum of five years for the **Refugee Student** and ESL/Francisation grants combined, irrespective of any moves between school jurisdictions.
5. Children/Students enrolled in Kindergarten will be included as 0.5 FTE for **Refugee Student** Grant WMA calculations.

C2.5 – Education Programs in an Institution Grant

Allocation Criteria

1. Funding is provided for education programs for resident **students** of the government who reside in an institution or approved facilities with a residential license from Children's Services. In the 2020/21 school year, funding is provided based on **the last three years' net actual average cost (i.e. 2017/18, 2018/19 and 2019/20 school years) of the program or the 2019/20 School Year's budgeted allocation whichever is higher** and will be held constant for the next three years.
2. Alberta Education will review the funding level after three years and adjust the funding level accordingly.
3. School authorities must have approval from the Minister and a contract/agreement with Alberta Education to provide an education program to **students** who reside in an institution.
4. Institutional funding will only be provided for eligible resident **students** of the government who:
 - a. reside in an unorganized territory and who are not Indians, as defined in the *Indian Act* (Canada) residing on a residence pursuant to the *Indian Act* (Canada); or

- b. are in custody under the *Corrections Act*, the *Corrections and Conditional Release Act* (Canada), the *Youth Justice Act* or the *Youth Criminal Justice Act* (Canada), who reside in an institution or a group home prescribed by the Minister as an institution or a Government of Alberta approved group home to which this clause applies.
- 5. Private school authorities are not eligible to receive severe disabilities funding for students in an EPI.
- 6. School authorities will be funded for a 10-month EPI unless the contract stipulates otherwise.
- 7. School authorities with a contract and approval to provide an EPI are required to:
 - a. ensure that the enrolment code 550 has been used in PASI for registering all eligible **students** in the institution (refer to Section L, Definition: Institution);
 - b. keep daily attendance records for all **students** and complete and submit an annual school profile by October 15;
 - c. ensure the quality of educational programming delivered is comparable to other school programs provided by the school jurisdiction and is subject to the same level of planning, evaluation and reporting required by provincial and local policy. School authorities are expected to retain all information regarding the education program on file, and submit it to the department upon request.
- 8. To submit an application for a new EPI, please contact the Learner Services Branch. Documentation must be submitted by December 1 preceding the school year for which approval is being requested.

C2.6 - Specialized Education Programs

Specialized Education Programs are for students who temporarily attend education programs in emergency women's shelters, hospitals and facilities that are not licensed by Children's Services as residential facilities. Students in Specialized Education Programs are not considered to be resident students of the government.

Allocation Criteria

- 1. Funding is provided for education programs currently offered in an emergency women's shelter, hospital or on a site that is not licensed by Children's Services as a residential facility. In the 2020/21 school year, funding is provided based on **the last three years' net actual average cost (i.e. 2017/18, 2018/19 and 2019/20 school years) of the program or the 2019/20 School Year's budgeted allocation whichever is higher** and will be held constant for the next three years. (refer to Section L, Definition: Specialized Education Programs).
- 2. Alberta Education will review the funding level after three years and adjust it accordingly.
- 3. School authorities must have approval from the Minister and a contract/agreement with Alberta Education to provide an education program to **students** in a facility identified as a "Specialized Education Program".
- 4. Private school authorities are not eligible to receive severe disabilities funding for **students** in a "Specialized Education Program".
- 5. Other Specialized Programs will be funded as a 10-month educational program unless their contract stipulates otherwise.
- 6. School authorities with a contract or approval to provide Specialized Education Programs are required to:
 - a. ensure that all eligible **students** are registered in PASI using the enrolment code 551;
 - b. keep daily attendance records for all **students** and complete and submit an annual school profile by October 15; and
 - c. ensure the quality of educational programming delivered is comparable to other school programs provided by the school jurisdiction, and is subject to the same level of planning, evaluation and reporting required by provincial and local policy. School authorities are

expected to retain all information regarding the education program on file, and submit it to the department upon request.

C2.7 – ECS Pre-Kindergarten Program Unit Funding (PUF) Grant

The Early Childhood Services (ECS) Program Unit Funding (PUF) Grant is provided to school authorities for each **child with a severe disability or severe language delay** who requires additional supports beyond that offered in a regular ECS program.

To be eligible for a maximum of two years of PUF, children must enter ECS at minimum age of 2 years 8 months.

Allocation Formula

The ECS PUF Grant is allocated using the Weighted Moving Average (WMA) enrolment of children with minimum age of 2 years 8 months and less than 4 years 8 months who have been assessed and diagnosed with a severe disability or severe language delay. The WMA enrolment is used to allocate funding for school jurisdiction to provide teacher-directed instruction to all children with severe disabilities or severe language delays who are registered in pre-Kindergarten (pre-K).

ECS programs for pre-K children registered with codes 41 through 46:

Half-day: WMA of pre-K children registered with codes 41 through 46

X

Half-day rate for codes 41 to 46

Full-day: WMA of pre-K children registered with codes 41 through 46

X

Full-day rate for codes 41 to 46

Note: 10% of pre-K WMA code 47 enrolment will be funded in the same manner as codes 41-46. This 10% of WMA enrolment for code 47 will not be included in the calculation for code 47 below.

ECS programs for pre-K children identified with Code 47:

Half-day: WMA of pre-K children registered with code 47

X

Half-day rate for code 47

Full-day: WMA of pre-K children registered with code 47

X

Full-day rate for code 47

Allocation Criteria

1. PUF will be allocated to school jurisdictions for the WMA enrolment of **children with a severe disability or severe language delay** for a maximum of two years preceding Kindergarten.
2. To be eligible for inclusion in the PUF WMA count for a maximum of two years, **a child with a severe disability or severe language delay** must be a minimum of 2 years 8 months of age and less than 4 years 8 months of age on September 1, and have not yet accessed two years of pre-K programming.
3. School jurisdictions **must** use the *Special Education Coding Criteria* to determine the **child's** eligibility for PUF and proper coding.

4. School jurisdictions are responsible for determining PUF eligibility. All required PUF eligibility documentation for each child must be completed and maintained at the school jurisdiction-level and be made available to Alberta Education upon request.
5. A **child's** eligibility for PUF will be based on **all** of the following:
 - a. Assessment by a qualified professional of a **severe disability or severe language delay**.
 - b. Documentation that demonstrates the severity of the impact the child's diagnosis has on the child's ability to participate and engage in learning in the ECS educational program.
6. All eligible children must be registered as of **September 30**. Funding will be based on weighted moving average (WMA) (see section C1.1 on calculation of WMA).
 Note: The date by which school authorities must submit their PUF enrolment count has been moved from September 30, 2020 to December 1, 2020 for the 2020-21 school year only, to support school authorities' preparation to return to classrooms following the closure of classes in the 2019-20 school year.
7. A school jurisdiction may operate a full day educational program, totaling a minimum of 800 hours of **teacher-directed instruction** per year, and/or a half-day educational program, totaling a minimum of 400 hours of teacher-directed instruction per year, under all of the following conditions:
 - a. An Alberta certificated teacher takes the lead role in the program planning process and takes responsibility for ensuring each child receives instruction, services and supports in order to meet the IPP goals.
 - b. A program that is less than 400 hour teacher-directed instruction will not qualify for funding.
 - c. Programs less than 800 hours but greater than 400 hours will be funded as a half-day.
8. For compliance and monitoring purposes, Alberta Education will conduct PUF eligibility verifications to include file documentation eligibility, program hour requirements, program delivery elements, IPP/ISP compliance, monitoring and evaluation through both desk and on site visitations.
9. Only one school authority will be allowed to register a PUF eligible child for the same time period.
10. Two separate 400 hour programs cannot be combined, or attended in two different authorities to create an 800 hour program.
11. A child included in the WMA enrolment calculation for PUF shall not be included in the WMA enrolment calculation for ECS mild/moderate, refugee and English as a Second Language/Francisation funding.

C2.8 – First Nations, Métis, and Inuit Grant

The First Nations, Métis and Inuit (FNMI) Grant is allocated to assist school authorities to provide system, program and instructional supports that improve education outcomes for FNMI **students** and support the implementation of Truth and Reconciliation Commission recommendations.

Allocation Formula

The FNMI education grant consists of the sum of three allocations.

Truth and Reconciliation Support Allocation

$$\begin{array}{c} \text{Provincial Total Truth and Reconciliation Support Amount} \\ \times \\ \text{School Jurisdiction's Proportional Share of the WMA FTE Enrolment} \end{array}$$

Student Self-Identification Allocation

$$\begin{array}{c} \text{Self-Identified FNMI WMA FTE Enrolment} \\ \times \\ \text{FNMI Rate} \end{array}$$

School and Community Demographic Allocation

$$\begin{array}{c} \text{Provincial Total School and Community Demographic Allocation} \\ \times \\ \text{School Jurisdiction Proportional Share of the WMA FTE factoring self-} \\ \text{identification and FNMI census population} \end{array}$$

1. The FNMI **Weighted Moving Average** (WMA) is calculated by applying the methodology for WMA outlined in the Base Instruction Grant to the counts of self-identified FNMI FTE **children/students**.
2. Incidence of self-identification is calculated by dividing the school jurisdiction's FNMI WMA by the overall WMA.
3. FNMI populations for each school jurisdiction are determined by Alberta Education using the following indicator from the 2016 Statistics Canada Census:
 - a) Per cent of families with children who identify themselves as Aboriginal
4. A school jurisdiction's proportional share of the WMA FTE factoring in the degree of self-identification and the census FNMI population is calculated as follows:

$$\frac{(incidence\ of\ selfidentification) * (FNMI\ incidence\ in\ population) * WMA}{\sum((incidence\ of\ selfidentification) * (FNMI\ incidence\ in\ population) * WMA)}$$

Allocation Criteria

1. The following types of self-identified FNMI **children/students** who reside off reserve are counted toward enrolment 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 jurisdiction procedures. For more information on annual verification, please see the Information for School Authorities document on the Aboriginal Student Self-Identification webpage.

2. 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.
3. In addition to the 330 code, for data collection purposes, First Nations **students** who reside on a reserve should also be coded as 331 if they choose to self-identify. Therefore, both codes may be entered for these individuals and the 330 code will override the 331 for funding purposes.
4. **Students** enrolled in home education are not eligible for inclusion in the WMA calculation.

C3 – School-Based Grants

C3.1 – Operations and Maintenance Targeted Grant

The Operations and Maintenance (O&M) Grant is provided to school authorities to address the jurisdiction's responsibility for the construction, operation, maintenance, safety and security of all school buildings, including costs relating to the supervision of this program.

Allocation Formula

$$\begin{array}{c} \text{Student Allocation (WMA FTE Enrolment x Rate)} \\ + \\ \text{School Space Allocation (Utilized \& Underutilized Space)} \end{array}$$

Allocation Criteria

Student Allocation (WMA FTE Enrolment)

The O&M FTE is based on the **Weighted Moving Average** (WMA) as defined in the Base Instruction Funding. For the purposes of calculating WMA FTE enrolment, ECS students are counted as 0.5 and Gr 1-12 students are counted as 1.

School Space Allocation – Utilized and Underutilized Space

The area (in square meters) of school facilities in active use for the instruction of ECS **children/ students** in Grades 1-12 is taken into account. School utilized space will be funded at the Utilized Rate and school underutilized space will be funded at the Underutilized Rate (approximately 70 per cent of the Utilized Rate). A school with a utilization rate of greater than or equal to 85 per cent is considered fully utilized. Both utilized and underutilized space are funded by school for the purpose of this grant:

1. Utilization rate of less than 85 per cent:
 - a. Utilized area in square meters x Utilized Rate
 - b. Underutilized area in square meters x Underutilized Rate
2. Utilization rate of 85 per cent or higher:
 - a. Utilized area in square meters x Utilized Rate
3. In the first year of a new school opening a new school's utilized and underutilized space will be determined as follows:
 - a. School utilized space is 50% of the school's gross area (excluding exempt area)
 - b. School underutilized space is 50% of the school's gross area (excluding exempt area)
4. The following schools are excluded from school space funding calculation:
 - a. Outreach Schools
 - b. Online Schools / Online Learning Centers
 - c. Home-Based Programs
 - d. Alternative Programs in privately owned buildings/facilities.
5. Alternative Programs in privately owned buildings/facilities are eligible to receive funding as per the student allocation component of O&M. The funding is based on their individual WMA FTE Enrolment multiplied by the applicable rate provided in **Section H**.

Note: All funded students registered in these schools would be counted towards WMA FTE enrolment and would receive student allocation of the O&M grant.

Utilized and Underutilized Area Calculation and Examples

Utilized Area = (Gross Area – Exempt Area) * Utilization Rate of the School

Example: School A – Gross Area = 1,000 Sq meter (m)
Exempt Area = 50 Sq m
Utilization Rate = 70%

*Utilized Area = (1000 – 50) * 70% = 665 m²*

Under Utilized Area = (950-665) = 285 m²

Example: School B – Gross Area = 1,000 Sq m
Exempt Area = 0 Sq m
Utilization Rate = 86%

*Utilized Area = (1000 – 0) * 100% = 1,000 m²*

Underutilized Area = (1,000 – 1,000) = 0 m²

The utilization rate calculation is provided in Section 9 of the Area, Capacity and Utilization section of the School Capital Manual.

Cost Allocation

Costs associated with this program include:

- Remuneration expenses for the supervisor of operations and maintenance of school facilities and all clerical and support staff associated with this program;
- Repair, maintenance and security of school buildings, equipment and grounds including services, contracts and supplies;
- General operational costs associated with the maintenance programs;
- Costs associated with maintenance staff involvement in the capital planning cycle;
- Emergency planning; and
- Facilities Planning and Development – The entire planning, development and construction cycle for capital building projects carried out by central office.

Costs related to O&M should be applied based on the nature of the work. Work performed by the Operations and Maintenance department which fits the definition of what is considered building maintenance is an O&M cost regardless of where the cost is incurred within the jurisdiction.

- **Telephones**
 - All landline charges should be charged to O&M.
 - Cell phone charges should follow the person to whom the phone is assigned. For example, a school or curriculum cell phone should be charged to the school or instruction.
 - Installing switches and technology infrastructure in a school this would be Instruction, but telephone infrastructure would be either Instruction, O&M, Transportation or System Admin for central offices depending on where the installation occurs.

- **Utilities**
 - All utilities should be charged to O&M except for central administration utilities which should be charged to System Administration and **student** transportation which should be charged to Transportation.
- **Custodial**
 - All custodial charges and costs related to cleaning supplies should be reported as O&M with the exception of central administration and **student** transportation. These should be charged to System Administration and Transportation respectively.
- **Amortization**
 - All building amortization should be charged to O&M except for amortization on central administration buildings which should be charged to System Administration. Vehicles and equipment that was purchased with O&M revenues, with a historic cost of \$5,000 or greater should be charged to O&M. Transportation vehicles and equipment should be charged to transportation.
- **SuperNet**
 - All costs related to the SuperNet should be charged to Instruction.
- **External Services**
 - Any costs related to External Services should be allocated to External Services on a pro-rata basis.

Insurance

Insurance costs should be allocated to **system administration** in relation to the purpose for which the insurance is placed:

- Property insurance for school buildings should be charged to O&M. Insurance costs related to Student Transportation should be charged to transportation.
- Any liability insurance should be charged depending on requirement of the liability insurance. For example, liability insurance on trustees or the executive team should be System Administration.
- Liability insurance on an operational director should be charged to the respective program (e.g., curriculum as Instruction, transportation to Transportation).

Liability insurance on educational assistants or teachers should be charged to Instruction and liability insurance related to the proportion of maintenance personnel.

Reporting

School boards are required to include an audited schedule for O&M expenditures in their Annual Audited Financial Statements. Costs associated with the operation and maintenance of all school buildings and maintenance shop facilities (excluding transportation facilities) should be classified under O&M.

As this is a targeted grant allocation, any unspent allocation is tracked and accounted for in an accumulated reserve schedule for future expenditures in O&M. School boards may use these funds for operations and maintenance and not in other areas of the education system. However, additional spending could occur in the total O&M schedule from other grants of the Funding and Assurance Framework.

C3.2 – Transportation Grant

Allocation Formula

$$\begin{array}{c} \text{2019/20 Transportation Funding Amount} \\ + \\ \text{5\% Supplemental Funding} \end{array}$$

Allocation Criteria

1. The *School Transportation Regulation* provides the requirements and eligibility for **students** and Early Childhood Services (ECS) transportation.
2. The transportation grant allocation is held constant at the 2019/20 level until a new transportation model has been developed and implemented. The 2019/20 allocation includes all of the grants related to transportation, such as Boarding, Rural Transportation, Urban Transportation, Metro Urban Transportation, Special Transportation (Grades 1-12), ECS Regular Transportation (Private ECS Operators) and ECS Special Transportation (School Authorities).
3. The supplemental funding added to the total provincial transportation budget for 2020/21 will be allocated proportional to the Transportation Allocation for 2019/20 school year.
4. Transportation agreements between school authorities and/or private ECS operators that are in existence for the 2019/20 school year are to be met for the 2020/21 school year as well. Funding for these **children/students** will be claimed by the school jurisdictions providing the transportation service. If there are changes to these agreements, the allocation will be adjusted by the department.

Documentation Requirements

School Authorities 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.

1. the effective transportation area of the school jurisdiction is that taken as of the September count date;
2. geographic roadway maps of overall attendance areas and transportation service areas;
3. location of each **student's** residence (street addresses in towns, villages and hamlets);
4. individual bus route lists that include stop locations and **students** transported;
5. a list of names of eligible transported ECS children transported by bus, and the names and grades of eligible passengers;
6. records of route distance verified by an official(s) of the school jurisdiction;
7. copies of educational services agreements;
8. copies of transportation agreements with school boards, private schools, charter schools and private ECS operators;
9. copies of completed route risk assessment forms;
10. copies of contracts with:
 - a. operators of contracted busses for all transportation;
 - b. parents providing transportation indicating the amount to be paid; and
 - c. agents providing special transportation for **students** with disabilities.

ECS operators are to maintain records of:

1. names of children transported;
2. number of days each individual child is transported;
3. copies of completed route risk assessment forms;
4. actual costs of transportation; and
5. special transportation provided.

C3.3 – SuperNet Service Funding

The SuperNet Service grant is provided to school authorities using SuperNet services as a primary data network.

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 FibreNet a Bell Company.
Examples of approved sites include **schools**, stand-alone outreach centers/**schools**, one **school authority** head office, and one network operation center.
2. Funding for eligible schools will be determined by Alberta Education through monthly reporting provided by Axia FibreNet a Bell Company beginning on the service activation date identified in the monthly reporting.
3. 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.
SuperNet Service funding is calculated on a monthly basis and provided for each approved site.
4. School authorities can contact Education Technology Leadership Services Branch (EDC.SuperNetAdmin@gov.ab.ca) to review funded services in the event of any discrepancy between their services purchased through, Axia FibreNet a Bell Company, and the report of funded services available on the Alberta Extranet, prior to March 31 of the fiscal year.
5. SuperNet Service funding is paid retroactively to the service activation date if the service is activated by March 31 of the current school year.

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

6. 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 authority** 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.

7. 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 request and sign a transfer document provided by the Education Technology Leadership Services Branch; 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 FibreNet a Bell Company.

8. Existing High Speed Networking Infrastructure Provision

Some **school authorities** that own and operate their own fibre-optic or wireless high-speed network connections between eligible SuperNet connectable sites can claim SuperNet service funding for these sites without an Axia FibreNet a Bell Company service 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 FibreNet a Bell Company 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 FibreNet a Bell Company; and
- c. the **school authority** owned infrastructure used to connect the sites together must be equal to or better than that used by the SuperNet build (contact the Education Technology Leadership Services Branch for details). Proof of the ownership of the network infrastructure must be provided to the Education Technology Leadership Services Branch upon request.

C4 – Community-Based Grants

C4.1 – Socio-Economic Status (SES) Grant

The Socio-Economic Status (SES) Grant is provided to school jurisdictions to better address their societal contexts and enhance equity and fairness of educational opportunities.

Allocation Formula

$$\begin{array}{c} \text{Provincial Total SES Grant for School Year} \\ \times \\ \text{School Jurisdiction's SES-Index-Weighted Share} \end{array}$$

Allocation Criteria

1. SES allocation is based on the jurisdiction's SES Index and Weighted Moving Average (WMA).
2. The SES Index is determined by Alberta Education using the following indicators from the 2016 Statistics Canada Census:
 - a. average number of years of education of mothers in families with children;
 - b. per cent of families, with children, headed by a lone parent;
 - c. per cent of families, with children, who own their dwelling;
 - d. average income of families with children; and
 - e. per cent of parents, with children, who have no post-secondary education.
3. The WMA is defined in the Base Instruction Funding in C1.1.
4. The grant is proportionally allocated to each school jurisdiction based on their SES-Index-Weighted Share. SES-Index-Weighted Share is the share of school jurisdiction's WMA weighted by its SES Index.
5.
$$SESIndexWeightedShare = \frac{SES\ Index*WMA}{\sum(SSES\ Index*WMA)}$$
6. The SES Indexes for school jurisdictions are listed in Section 0.

C4.2 – Geographic Grant

The Geographic Grant is provided to school authorities to better address their geographic location contexts and enhance equity and fairness of educational opportunities.

Allocation Formula

$$\begin{aligned} & \text{(Total Provincial Rurality Factor Allocation for School Year x} \\ & \quad \text{School Jurisdiction's Rurality Factor Index-Weighted Share)} \\ & \quad + \\ & \text{(Total Provincial Sparsity-Distance Allocation for School Year x} \\ & \quad \text{School Jurisdiction's Sparsity-Distance Factor Index-Weighted Share)} \\ & \quad + \\ & \text{(Total Provincial Northern Location Allocation for School Year} \\ & \quad \text{x School Jurisdiction's Northern Location Factor Index-Weighted Share)} \\ & \quad + \\ & \text{Jurisdiction Rural Area Allocation for School Year} \end{aligned}$$

Allocation Criteria

1. The Geographic Grant provides additional funding to school jurisdictions to address their unique geographic challenges including rurality, sparsity, distance, area and location; and enhance equity and fairness of educational opportunities for **students**.
2. The Geographic grant for school jurisdictions, Francophone Regional Authorities and charter schools is determined by Alberta Education using the following geographic factors:
 - a. **Rurality Factor:** Weighted proportion of **students** in schools located in rural and small population centers based on 2016 Statistics Canada Census
 - b. **Northern-Location Factor:** Weighted proportion of **students** in schools north of 55th parallel
 - c. **Sparsity-Distance Factor:** Sparsity (area divided by WMA) of the school jurisdiction; and distance of school jurisdiction from a large population center and distance of the schools from a large or medium population center, as defined by 2016 Statistics Canada Census
 - d. **Area Allocation:** Allocation is based on the size of the effective rural transportation area served by the jurisdiction.
3. The WMA is defined in the Base Instruction Funding in Section C1.1.
4. The grant is proportionally allocated to each school jurisdiction based on their Weighted Share for each geographic factor. Geographic-Factor-Weighted Share is the share of school jurisdiction's WMA weighted by its Geographic Index for each factor.
5.
$$GeographicFactorWeightedShare = \frac{Geographic\ Factor\ Index * WMA}{\sum (Geographic\ Factor\ Index * WMA)}$$
6. Area allocation is calculated by multiplying the area factor with the area base rate.
7. Urban school jurisdictions whose geographic complexities are not addressed through the above factors are provided a supplemental geographic allocation based on their WMA FTE.
8. The Geographic Factor Indices for school jurisdictions are listed in Section O.

C4.3 – School Nutrition Grant

The School Nutrition Grant is to provide **students** in school jurisdictions across Alberta with a daily nutritious meal that adheres to the Alberta Nutrition Guidelines for Children and Youth.

Allocation Formula

$$\begin{array}{c} \text{Weighted Moving Average (WMA) FTE Allocation} \\ + \\ \text{Socio-Economic Status (SES) Allocation} \end{array}$$

Allocation Criteria

1. The grant is applicable for school jurisdictions and Francophone regional authorities only.
2. The School Nutrition Grant allocation has two components—SES Allocation and WMA Allocation.
3. The WMA Allocation is based on the Weighted Moving Average (WMA) as defined in the Base Instruction Funding in Part C1.1. WMA categories for metro boards and non-metro boards are listed in Section N1.3.
4. School jurisdictions are categorized based in their SES Index. SES Allocation is based on the SES category that the school jurisdiction belongs to. SES categories for the school jurisdictions are listed in Section O.

C4.4 – Francophone Equivalency Grant

The Francophone Equivalency Grant is provided to **Francophone Regional Authorities** in recognition of the increased costs associated with providing equivalent minority language education services.

Allocation Formula

$$\begin{array}{c} \text{Weighted Moving Average (WMA) FTE} \\ \times \\ \text{FEA Rate} \end{array}$$

Allocation Criteria

1. 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.
2. The Francophone Equivalency Grant FTE is based on the Weighted Moving Average (WMA) as defined in the Base Instruction Funding in Part C1.1.

C4.5 – Fort McMurray Allowance

The Fort McMurray Allowance is provided to school jurisdictions who have employees that live and work in the vicinity of Fort McMurray.

Allocation Formula

$$\begin{array}{c} \text{\# of Eligible FTE Employees} \\ \times \\ \$1,040 \text{ Per Month} \end{array}$$

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 the applicable form 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 the form 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.

C5 – System Administration

C5.1 – System Administration Targeted Grant

System Administration expense definitions have been developed on a principle based approach intended to increase transparency of costs and greater consistency between jurisdictions. Recognizing the intricacies and inter-relationships of the functions within a school jurisdiction has resulted in the need to develop a pro-rata based model, which recognizes allocations may be required to reflect this fact. Guidelines and allocations are designed to support jurisdiction decision making and actions that support student learning.

Board Governance

- Board Governance includes all activities related to the work and operation of the elected board of trustees. This includes all directly related support, including staff, for trustees. Board governance is composed of all payments to trustees in any form (salaries, wages, benefits, per diems, honorariums, allowances and any other form of compensation) and expenses incurred by the board for such things as travel, professional development, board sponsored functions, conference attendance, membership fees and school board elections.

All Other Central Office Functions

- Costs for these services should be allocated based on the benefit relative to the function that they serve. This allocation may use a reasonable allocation basis, (e.g. an FTE basis) if so desired but must be applied consistently year over year.
- Administration buildings cost that are shared facilities should be allocated to the respective programs based on square footage.

Allocation Formula

$$\frac{(\text{Base Funding} + (\text{WMA FTE Students} \times \text{System Administration Rate}))}{\text{Adjustment Factor}}$$

Allocation Criteria

1. The Weighted Moving Average (WMA) is defined in the Base Instruction Funding in C1.1. For the purpose of this grant a **child** in ECS is counted at 0.5 FTE.
The Adjustment Factor is jurisdiction-specific and ensures the maximum allowable expenditure for **System Administration** is between 3.15 and 4.95 per cent of each jurisdiction's total operating expenditure based on the August 31, 2019 Audited Financial Statements. The percentage is determined by WMA FTE enrolment. School jurisdictions, francophone regional authorities and charter schools with:
 - a. less than 2,000 WMA FTE enrolment receive 4.95 per cent;
 - b. greater than 6,000 WMA FTE enrolment receive 3.15 per cent;
 - c. greater than 2,000 and less than 6,000 WMA FTE enrolment receive between 3.15 and 4.95 per cent on a sliding scale; and
 - d. the Adjustment Factor may change due to adjustments in the number of WMA FTE enrolment.
2. The **System Administration** allocation provided to each authority will be a fixed amount for each of the next three school years beginning with 2020/21.
3. **System Administration** is a targeted and dedicated allocation:
 - a. Transfer of funds from other grants to System Administration is not permitted.
 - b. Funds can be transferred from System Administration to other grants.
 - c. In the case where the formula allocates less than \$400,000, the maximum amount the jurisdiction will be permitted to spend on **System Administration** will be \$400,000.

In the case where the Audited Financial Statement of an authority indicates that **System Administration** expenditure exceeded the allocated amount, Alberta Education will deduct the amount by which the expenditure exceeds the allocated amount from this authority's operational funding in the following school year.

Section D - Funding for Accredited Funded Private Schools

D1 – Base Instruction Grants

D1.1 – Weighted Moving Average

Base instruction grants are allocated using the three-year **Weighted Moving Average** (WMA) enrolment of school authorities. Funding provided through the base instruction component does not allocate funding for specific **students** or schools. Rather, WMA enrolment is used to allocate funding for the Early Childhood Services (ECS)-Grade 12 instructional activities of the entire school authority. The three-year WMA enrolment is calculated as follows:

School Year	Weighted Factor	Enrolment Count (FTE)
2018/19	20%	Actual
2019/20	30%	Estimate
2020/21	50%	Projection

Example A: WMA calculation of a school authority with a growing **student** enrolment would be as follows:

School Year	Weighted Factor	Enrolment Count (FTE)
2018/19	20%	16,480
2019/20	30%	16,700
2020/21	50%	16,850
WMA Enrolment (FTE)	$(16,480 \times 20\% + 16,700 \times 30\% + 16,850 \times 50\%) = 16,731$	

Example B: WMA calculation of a school authority with a declining **student** enrolment would be as follows:

School Year	Weighted Factor	Enrolment Count (FTE)
2018/19	20%	5,460
2019/20	30%	5,400
2020/21	50%	5,350
WMA Enrolment (FTE)	$(5,460 \times 20\% + 5,400 \times 30\% + 5,350 \times 50\%) = 5,387$	

The projected enrolment count will be determined based on Alberta Education's calculations and input from school authorities.

The projected enrolment count used in the calculation of WMA for the budgeted school year will be compared against the actual enrolment count in December of the school year. However, there will be no in-year adjustments if the projected count is different from the actual count. The difference between the projected count and actual September 30th **student** count will be accounted for in the calculation of WMA for the subsequent school year. If the projected count is higher than the actual count, the WMA for next year will be adjusted down, and if the projected count is lower, the WMA for next year will be adjusted up to account for the difference.

If an authority is not compliant with the rules outlined in the funding manual, the department will adjust the funding allocation for the following school year in accordance with the audit result.

An example is provided in the table below:

Example WMA Calculation				
	2018-2019	2019-2020	2020-2021	2021-2022
Actual count	16480	16700	16800	
Projected count			16850	16876
WMA for 2020-2021 funding calculations (calculated in Feb 2020 using 2020-2021 projected count)			20%*16480 + 30%*16700 + 50%* 16850 = 16731	
WMA verification for 2020-2021 (calculated in Dec 2020 using 2020-2021 actual count)			20%*16480 + 30%*16700 + 50%* 16800 = 16706	
WMA adjustment			16731 – 16706 = 25	
WMA for 2021-2022 (calculated in Feb 2021)				(20%*16700 + 30%*16800 + 50%*16876) – 25 = 16793

D1.2 – ECS to Grade 9 Base Instruction Grant

ECS to Grade 9 funding is allocated using the three-year Weighted Moving Average (WMA) enrolment of the school authority. This does not allocate funding for specific **children/students**.

Allocation Formula

Base Instruction Rate (applicable grade level rate)
×
Weighted Moving Average (WMA) Enrolment (applicable grade)

Allocation Criteria

1. A child who meets conditions a, b, c, and d unless e, f, g or h apply is counted toward WMA enrolment for the purposes of allocating **ECS base** instruction funding:
 - a. 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;

b. meets the minimum age requirements as set out in the following table:

Category of ECS Children	Type of ECS Funding Provided*	Minimum age of the child on September 1	Maximum age of the child on September 1
Kindergarten child	Base Instruction Funding (Maximum of 1 year funding)	4 years 8 months	Less than 6 years
ECS child with a mild/moderate disability/delay,	Base Instruction Funding and Mild/Moderate Funding (Maximum 2 years funding which includes the Kindergarten year)	3 years 8 months	Less than 6 years
ECS child who is gifted and talented	Base Instruction Funding and Gifted and Talented Funding (Maximum 2 years funding which includes the Kindergarten year)	3 years 8 months	Less than 6 years
ECS child with English as a Second Language (ESL) needs	Base Instruction Funding (Maximum 2 years funding which includes the Kindergarten year) and ESL Funding	3 years 8 months	Less than 6 years
ECS child with severe disabilities/delay	Base Instruction Funding (Maximum 3 years funding which includes the Kindergarten year) and PUF Funding	2 years 8 months	Less than 6 years
ECS child who is developmentally immature	Base Instruction Funding (Maximum 2 years funding)	4 years 8 months	Less than 7 years

*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.

- c. Is a resident of Alberta and has a parent who ordinarily resides in Alberta on the September count date;
- d. Is a Canadian citizen on the September count date; or
 - i. is lawfully admitted to Canada for permanent residence; or
 - ii. is a child of a Canadian citizen; or
 - iii. is a child of an individual who is lawfully admitted to Canada as a permanent or temporary resident; or

- iv. is a 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
 - v. is a step-child of a Canadian citizen and is the biological or adopted child of the Canadian citizen's non-Canadian spouse or partner. The following documentation is required:
 - o proof of application for permanent resident status and fee payment to Immigration, Refugees and Citizenship Canada (IRCC); or
 - o valid study permit for the child.
 - e. For funding purposes, a First Nations child who resides on a reserve is not counted toward WMA enrolment.
 - f. An individual who is developmentally immature (code 10).
 - g. An individual who is at least 5 years 8 months but less than 7 years of age on September 1, and who is either coded severe or mild/moderate, gifted/talented, or ESL may be counted toward WMA enrolment if the ECS service provider 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.
 - h. An individual who is at least 6 years of age, but less than 7 years old on September 1 may be counted toward WMA enrolment 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.
2. As per Section 21(2) of the *Education Act*, an authority "may provide an early childhood services program to a **student** who, as of September 1, is younger than 7 years of age, if the parent of the **student** and the board are of the opinion that the program will benefit the student." **Children/students** who were placed in the ECS program at Accredited Funded Private Schools and have not yet accessed the maximum number of years of ECS programming that they are eligible to access, will be counted toward the WMA enrolment calculation for ECS.
 3. **Children/students** with primary registration as of September 30 at an Accredited Funded Private School will be counted toward the WMA calculation. Please refer to the Glossary for the definition of **primary registration** and **non-primary registration**.
 4. Base Instruction Funding for ECS will be based on ECS WMA enrolment of the Accredited Funded Private School.
 5. School authorities must provide each **child/student** during a school year with:
 - a. **a minimum of 475 hours of ECS instruction (or a minimum of 400 hours for children identified as having severe disabilities or delay); or,**
 - b. **a minimum of 950 hours of instruction for Grade 1-9.**
 6. Any school authority providing less than 475 hours (or less than 400 hours for children identified as having severe disabilities or severe language delay) for ECS and 950 hours for Grade 1-9 will not receive funding for that programming.
 7. Under no circumstances can a **child/student** be counted toward the WMA enrolment calculation for both ECS and Grade 1-9 in the same school year.
 8. A **student** will be counted toward WMA enrolment for an academic program associated with an activity program offered in a Canadian province or territory outside of Alberta if:
 - a. the **student** meets the criteria of a **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.

D1.3 – High School Base Instruction Grant

High school funding is allocated using the three-year **Weighted Moving Average** (WMA) enrolment of a school authority. The formula does not allocate funding for specific courses, **students** or schools. Rather, WMA enrolment of high school **students** is used to allocate funding for the high school program of the authority.

Accredited funded private schools remain responsible for determining which education programs (e.g., CTS, Work Experience, RAP, Dual Credit and Green Certificate) they will offer.

Allocation Formula

Students in their first, second, or third year of high school

Grade 10-12 WMA Enrolment × 100 per cent of High School Base Rate

Students in their fourth year of high school

Grade 10-12 WMA Enrolment × 50 per cent of High School Base Rate

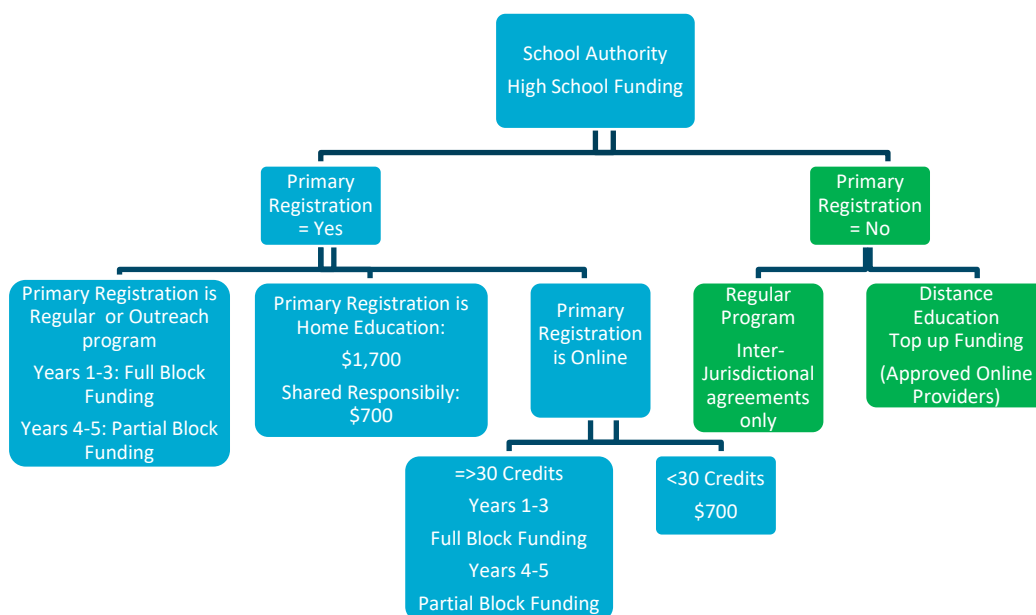
Students beyond their fourth year of high school

Grade 10-12 WMA Enrolment × 25 per cent of High School Base Rate

Note: Weighted Moving Average (WMA) enrolment calculation methodology is defined in Section D1.1 of the manual.

Allocation Criteria

1. **Students** in Grade 10-12 who are less than 20 years of age on September 1 will be counted toward the WMA enrolment calculation for this grant.
2. School authorities must provide **students** with a **minimum of 1000 hours** of instructional time for Grades 10-12.
3. RAP, Work Experience and special projects courses are required to provide 25 hours per credit, in accordance with the Guide to Education.
4. High school students in an online program completing 30 or more credits will be counted toward the WMA enrolment of the Accredited Funded Private Schools.
5. High school **students** in an online program completing fewer than 30 credits are counted toward the WMA enrolment of the Accredited Funded Private Schools. However, this enrolment will be funded at a lower rate. Please refer to **Section H** of the manual for the applicable funding rate.
6. Summer school funding is provided for up to 10 credits per student completed in the summer for high school courses. Please refer to **Section H** of the manual for the applicable funding rate.
7. Approved heritage language accredited funded private schools are eligible to receive credit funding for high school language courses that are completed but are not eligible for any other funding provided by Alberta Education to accredited funded private schools.
8. Credits completed at the Approved heritage language accredited funded private schools would be funded at \$173 per credit similar to summer school per credit rate outlined in **Section H** of the funding manual.
9. The following decision tree shows how the high school funding would be determined under the new Funding and Assurance Framework:



D1.4 – Summer School Grant

The Summer School Grant supports school authorities offering summer school for **students** who require this form of educational choice.

Allocation Formula

$$\text{Summer School Base Rate} \times \text{Number of Completed Credits (Maximum 10)}$$

Allocation Criteria

1. Summer school funding is provided for up to 10 credits completed per **student** in the summer for high school courses.
2. Funding is provided on a credit basis for summer school high school courses as follows:
 - a. 16 hours for a 1 Credit Value 1 = 1
 - b. 48 hours for a 3 Credit Value 3 = 3
 - c. 80 hours for a 5 Credit Value 5 = 5
3. High school courses provided 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.
4. RAP, Work Experience and special projects courses are required to provide 25 hours per credit, in accordance with the Guide to Education.
5. Summer school funding will be calculated based on the average of last three school years completed credits. Example: For the 2020/21 school year, 2016/17, 2017/18 and 2018/19 school years summer course enrolment data is used for the funding calculation.

D1.5 – Distance Education Grant

The Distance Education Grant supports equitable access to quality programming through multiple providers of distance education (on-line and print-based) programs across the province. Funding provided through the Distance Education Grant does not allocate funding for specific **students** or schools. Rather, **Weighted Moving Average (WMA)** enrolment is used to allocate funding to distance education programs of the entire school authority for **students** with primary and non-primary registration.

Allocation Formula

Funding provided through the Distance Education Grant is based on the **Weighted Moving Average (WMA)** enrolment to support distance education programs for students with **primary and non-primary registration**.

Full-time Online Students with Primary Registration

The allocation formula for **students** with a full-time primary registration in an online learning or print-based distance education program will be:

$$\begin{array}{c} \text{WMA Enrolment Online Students (30 credits or Higher for high school students)} \\ \times \\ \text{High School Student Base Funding Rate} \end{array}$$

WMA enrolment for online **students** will be calculated as per methodology described in Section D1.1 of the manual.

Funding allocation for private and charter schools (no geographic district boundaries) will be based on non-primary **student** enrolments as per the tiered allocation for out-of-district **students** (see below).

Part-time Online Students with Primary Registration

The allocation formula for **students** with a part-time primary registration (<30 credits) in an online learning or print-based distance education program will be:

$$\begin{array}{c} \text{WMA Enrolment Online Students (<30 credits completed for high school students)} \\ \times \\ \text{Part-Time Online Student Rate} \end{array}$$

Note: Alberta Education will use the last three years of actual online enrolment data to calculate the WMA enrolment of online **students**.

Funding allocation for private and charter schools (no geographic district boundaries) will be based on non-primary **student** enrolments as per the tiered allocation for out-of-district **students** (see below).

Online Students with Non-Primary Registration:

School authorities will receive funding for out-of-district students including students registered with private and charter schools, based on the following tiered allocation formula:

- \$35,000 for 35 to 100 **students**;
- \$122,500 for 101 to 250 **students**;
- \$262,500 for 251 to 500 **students**; and
- \$350,000 for 500+ **students**.

Funding level is based on the last completed school year data. Example: for budget 2020/21 the last completed school year data is 2018/19.

Funding allocation for private and charter schools (no geographic district boundaries) will be based on non-primary **student** enrolments as per the tiered allocation for out-of-district **students** (see above).

Allocation Criteria

Please refer to Section C1.5 Allocation Criteria (Distance Education Grant).

D1.6 – Home Education and Shared Responsibility Grant

The Home Education Grant supports educational choice for students and parents. For each home education student, the school authority is provided 50 per cent of the funding to support the home education student, and 50 per cent of the funding is provided to the parent and/or guardian as reimbursement for instructional materials and services that support the instructional program at home. Furthermore, parents who submit receipts for at least 75% of eligible expenses will receive the entire \$850.00.

Allocation Formula

$$\begin{array}{c} \text{Number of Home Education Students Grade 1-12 (as of September 30th Enrolment)} \\ \times \\ \text{Home Education Rate} \end{array}$$

Allocation Criteria

1. The Home Education Grant is based on number of home education students in Grade 1-12 (as of September 30th). Home education funding is provided to support the education of Alberta students from Grades 1-12.
2. The education programs for home education **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**.
3. The **associate board** or **associate accredited funded private school** must provide the resident board information through PASI and Student Records.
4. Home education **students** and their parents must reside in Alberta on the September count date of the current school year.
5. Home education **students** in accredited funded private schools are not eligible for severe disabilities funding.
6. 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 for the purchase of instructional materials.
7. If parents decline or do not claim the parent portion of Home Education funding by August 31 of the school year for which the amount was provided, Alberta Education will recover the unclaimed/declined portion. Home Education funding to school authorities will be adjusted accordingly in the following school year.
8. School authorities will provide information related to unclaimed/declined portion of the Home Education Grant in their Audited Financial Statements (AFS).
9. Students that are coded as shared responsibility students and meet the program requirement outlined in The Guide to Education will be funded at the shared responsibility rate. Shared responsibility programs receive additional funding to address instructional costs.
10. School authorities that provide shared responsibility program may use some or all of the parents' 50 per cent funding to pay for the cost of these courses and required instructional materials.

D1.7 – Base Instruction Grant for Designated Special Education Private Schools (DSEPS)

Allocation Formula

$$\begin{array}{c} \text{Allocation for Students with Mild or Moderate Disabilities in DSEPS} \\ \text{Weighted Moving Average (WMA) Students with Mild/ Moderate Disabilities in} \\ \text{DSEPS} \\ \times \\ \text{DSEPS Mild/Moderate Rate} \\ \text{and/or} \\ \text{Allocation for Students with Severe Disabilities in DSEPS} \\ \text{(not including severe disabilities funding)} \\ \text{Weighted Moving Average (WMA) of Approved Students with Severe Disabilities in} \\ \text{DSEPS} \\ \times \\ \text{DSEPS Severe Disabilities Rate} \end{array}$$

Allocation Criteria

1. For more information on student eligibility for DSEPS, refer to section D2.3.
2. The Base Instruction Grant for **students** in Grades 1-12 with mild/moderate disabilities or severe disabilities in Designated Special Education Private Schools (DSEPS) is based on the Weighted Moving Average (WMA) enrolment.
3. **DSEPS** are not required to notify resident boards, in writing, of the board's resident **students** who are registered at the **DSEPS**. Resident boards and **DSEPS** are able to access these **student** lists using the Funding Event System (FES).
4. Parents are no longer required to consult with a school official or their resident board regarding their child's special education programming options.

D2 – Program Supports and Services

D2.1 – English as a Second Language (ESL) Grant

The English as a Second Language (ESL) Grant is provided for **children/students** who require additional support in the English language.

Allocation Formula

$$\begin{array}{c} \text{ESL Weighted Moving Average (WMA) FTE Enrolment} \\ \times \\ \text{ESL Rate} \end{array}$$

Allocation Criteria

1. Children/students who require additional English Language supports and instruction to achieve grade level expectations in English and other subject areas must be coded as either ESL-Funded Foreign born (code 301) or ESL-Funded Canadian born (code 303).
2. Documentation of an assessment, conducted within the past five years, must be kept on file at the school/school authority that supports the need for additional English language supports.

3. Funding allocation for ESL will be calculated based on the ESL Grant **Weighted Moving Average** (WMA) FTE enrolment.
4. The calculation of ESL grant WMA FTE will include **children/students** who meet the following criteria:
 - a. Aged at least 3 years 8 months as of September 1 of the school year;
 - b. Enrolled in a pre-K, Kindergarten or Grades 1-12 as an Alberta **student**;
 - c. Coded as either ESL-Funded Foreign born (code 301) or ESL-Funded Canadian born (code 303);
 - d. Not enrolled in home education, outreach, distance education or online programs; and
5. **Children/students** included under PUF or Refugee Student Grants are not included in the ESL WMA FTE calculation;
6. **Children/students** will be included in the WMA FTE calculation up to a maximum of five years (including pre-K and kindergarten) for the **Refugee Student** and ESL grants combined (e.g., a **student** coded as ESL for Kindergarten would only be included in the WMA FTE calculation for the Refugee Student Grant for four years). The total of up to 5 years of funding is irrespective of any moves between school jurisdictions.
7. **Children** enrolled in pre-K and Kindergarten will be included as 0.5 FTE for ESL Grant WMA calculation.

D2.2 – First Nations, Metis and Inuit Grant

The purpose of this grant is to support accredited funded private schools in the provision of system, program and instructional supports that improve the educational outcomes for First Nations, Metis and Inuit students.

Allocation Formula

$$\text{FNMI Weighted Moving Average (WMA) FTE Enrolment} \times \text{FNMI Rate}$$

Allocation Criteria

1. Funding for accredited funded private schools is based on the number of self-identified FNMI FTE **students** only.
2. The following types of self-identified FNMI **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.
3. FNMI **students** 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.
 - a. Verifying demographic information can 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 (https://education.alberta.ca/media/3704427/aboriginal-self-identification_sch-auth-faq_jan2017.pdf).
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 will not be included in WMA enrolment calculations for 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 **students**. The 330 code will override the 331 for funding purposes.

6. The grant allocation is calculated based on the Weighted Moving Average (WMA) FTE enrolment.
7. **Students** enrolled in home education are not eligible for inclusion in the WMA enrolment calculation for this grant.

D2.3 – Severe Disabilities Grant for Accredited Funded Private Schools (Including Designated Special Education Private Schools)

Allocation Formula

$$\begin{array}{c} \text{Severe Disabilities Weighted Moving Average (WMA) Enrolment} \\ \times \\ \text{Severe Disabilities Rate} \end{array}$$

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** in Grades 1-12 with severe disabilities to determine a **student's** eligibility and to properly code the **student** for funding purposes.
2. Severe disability funding will be provided on approval of the **student's** eligibility by the Learner Services Branch.
3. The grant is based on the Weighted Moving Average (WMA) enrolment of **approved students** with severe disabilities.
4. All accredited funded private schools (including DSEPS) and charter schools will use the Severe Disabilities Funding (SDF) SharePoint Site to submit required documentation, locate resources and receive announcements about the severe disabilities funding application process and deadlines.
5. 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.
6. **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.
7. **Students** with severe disabilities enrolled in an online program or home education program are not eligible for severe disabilities funding.
8. 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; and
9. 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 authority, a different accredited funded private school or a charter school.

D2.4 – ECS Program Unit Funding (PUF) Grant

The Early Childhood Services (ECS) Program Unit Funding (PUF) Grant is provided to school authorities for each **child with a severe disability or severe language delay** who requires additional supports beyond that offered in a regular ECS program.

To be eligible for a maximum of three years of PUF, children must enter ECS at minimum age of 2 years 8 months.

Allocation Formula

ECS programs for children registered with codes 41 through 46:

Half-day: WMA of ECS children registered with codes 41 through 46
X
Half-day rate for codes 41 to 46

Full-day: WMA of ECS children registered with codes 41 through 46
X
Full-day rate for codes 41 to 46

Note: 10% of ECS WMA code 47 enrolment will be funded in the same manner as codes 41-46. This 10% of WMA enrolment for code 47 will not be included in the calculation for code 47 below.

ECS programs for children registered with code 47:

Half-day: WMA of ECS children registered with code 47
X
Half-day rate for code 47

Full-day: WMA of ECS children registered with as code 47
X
Full-day rate for code 47

Allocation Criteria

1. PUF will be allocated to an accredited funded private school with an ECS program for each eligible **child with a severe disability or severe language delay** for a **maximum of three years**, including the kindergarten year.
2. To be eligible for a maximum three years of ECS funding, a **child with a severe disability or severe language delay** must be at least of 2 years 8 months of age and less than 6 years of age on September 1, and have not yet accessed three years of ECS programming.
3. Accredited funded private schools with an ECS program **must** use the *Special Education Coding Criteria* to determine the **child's** eligibility for PUF and **proper coding**.
4. Accredited funded private schools with an ECS program are responsible for determining PUF eligibility. All required PUF eligibility documentation for each **child** must be completed and maintained at the accredited funded private school with an ECS program and be made available to Alberta Education upon request.
5. A **child's** eligibility for PUF will be based on **all** of the following:
 - a. Assessment by a qualified professional of a **severe disability or severe language delay**;

- b. Documentation that demonstrates the severity of the impact the **child's** diagnosis has on their ability to participate and engage in learning in the ECS educational program;
- 6. All eligible **children** must be registered as of **September 30**. Funding will be based on Weighted Moving Average (WMA) (see section C1 on calculation of WMA).

Note: The date by which school authorities must submit their PUF enrolment count has been moved from September 30, 2020 to December 1, 2020 for the 2020-21 school year only, to support school authorities' preparation to return to classrooms following the closure of classes in the 2019-20 school year.

- 7. An accredited funded private school with an ECS program may operate a full day educational program, totaling a minimum of 800 hours of **teacher-directed instruction** per year, and/or a half-day educational program, totaling a minimum of 400 hours of teacher-directed instruction per year, under all of the following conditions:
 - a. An Alberta certificated teacher takes the lead role in the program planning process and takes responsibility for ensuring each child receives instruction, services and supports in order to meet the IPP goals.
 - b. A program that does not provide a minimum of 400 hours of teacher-directed instruction will not be funded.
 - c. Programs of less than 800 hours but greater than 400 hours of teacher-directed instruction will be funded as a half-day.
- 8. For compliance and monitoring purposes, Alberta Education will conduct PUF eligibility verifications to include file documentation eligibility, program hour requirements, program delivery elements, IPP/ISP compliance, monitoring and evaluation through both desk and on site visitations.
- 9. Only one accredited funded private school with an ECS program will be allowed to register a PUF eligible **child** for the same time period.
- 10. Two separate 400 hour programs cannot be combined, or attended in two different authorities to create an 800 hour program.
- 11. A **child** included in the WMA enrolment calculation for PUF shall not be included in the WMA enrolment calculation for ECS mild/moderate, refugee and English as a Second Language/Francisation funding.

D2.5 – ECS Mild/Moderate Disabilities, Gifted and Talented Grant

Allocation Formula

$$\begin{array}{c} \text{Weighted Moving Average (WMA) Enrolment of children registered with} \\ \text{code 30 or 80} \\ \times \\ \text{Mild/Moderate and Gifted and Talented Rate} \end{array}$$

Allocation Criteria

- 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. **Children** eligible for inclusion in the WMA enrolment calculation for this funding must be coded as:
 - a. Code 30 mild/moderate disabilities/delays; or
 - b. Code 80 gifted and talented
- 3. Funding allocation is based on the Weighted Moving Average (WMA) enrolment of **children** mild/moderate disabilities/delays, or those who are gifted and talented.

- School authorities will use the Special Education Coding Criteria to determine the **child's** eligibility and correct coding.
- Funding is available for a maximum of two years, which includes one year of Kindergarten.

D2.6 – Education Programs in an Institution Grant

Please refer to Section C2.5 (Education Programs in an Institution Grant).

D3 – School Based Grants

D3.1 – Operations and Maintenance Grant

The Operations and Maintenance (O & M) Grant is provided to school authorities to address the authority's responsibility for operation and maintenance, safety and security of all school buildings, including costs relating to the supervision of this program.

Allocation Formula

$$\begin{array}{c} \text{Weighted Moving Average (WMA) FTE Enrolment} \\ \times \\ \text{Operations and Maintenance Rate} \end{array}$$

Allocation Criteria

- The Weighted Moving Average (WMA) FTE enrolment is as defined in the Base Instruction Funding in D1.1.
- For the purposes of this grant a **child** in Early Childhood Services (ECS) is counted at 0.5 FTE.
- For more information on the allocation of Operations and Maintenance costs, please refer to Section C3.1.

D3.2 – Transportation Grant

Allocation Formula & Criteria

- The *School Transportation Regulation* provides the requirements and eligibility for **students** and Early Childhood Services (ECS) transportation.
- The transportation grant allocation is held constant at the 2019/20 level until a new transportation model has been developed and implemented.
- Transportation agreements between school authorities and/or private ECS operators that are in existence for the 2019/20 school year are to be met for the 2020/21 school year as well. Funding for these **children/students** will be claimed by the school jurisdictions providing the transportation service. If there are changes to these agreements, the allocation will be adjusted by the department.

Documentation Requirements

School Authorities 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.

- the effective transportation area of the school jurisdiction is that taken as of the September count date.
- geographic roadway maps of overall attendance areas and transportation service areas;
- location of each student's residence (street addresses in towns, villages and hamlets);
- individual bus route lists that include stop locations and **students** transported;

5. a list of names of eligible transported ECS children transported by bus, and the names and grades of eligible passengers;
6. records of route distance verified by an official(s) of the school jurisdiction;
7. copies of educational services agreements;
8. copies of transportation agreements with school boards, private schools, charter schools and private ECS operators;
9. copies of completed route risk assessment forms;
10. copies of contracts with:
 - a. operators of contracted busses for all transportation;
 - b. parents providing transportation indicating the amount to be paid; and
 - c. agents providing special transportation for students with disabilities.

ECS operators are to maintain records of:

1. names of children transported;
2. number of days each individual child is transported;
3. copies of completed route risk assessment forms;
4. actual costs of transportation; and
5. special transportation provided.

D3.3 – SuperNet Service Funding

Please refer to Section C3.3 (SuperNet Service Funding).

D4 – Community-Based Funding

D4.1 – Community Support Grant

A community's socio-economic context poses unique challenges to the operation of schools and the delivery of educational services. The Community Support Grant is provided to address these challenges, which will help to improve educational outcomes of funded private schools.

Allocation Formula

<p style="text-align: center;"> Base Allocation + WMA FTE Enrolment Student Allocation </p>
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Allocation Criteria

1. Private schools are eligible for the Community Support Grant. Funded private schools will receive a base allocation of \$8,750.
2. **Student** allocation will be calculated using WMA FTE enrolment as per methodology described in **Section D 1.1** of the manual.
3. Funding rates per WMA FTE for private schools and Designated Special Education Private Schools (DSEPS) are provided in **Section H** of the manual.
4. Private ECS operators are not eligible for the Community Support Grant.

D5 – System Administration

D5.1 – System Administration Grant

For more information on what is considered to be **System Administration** cost, please refer to Section C5.1.

Allocation Formula

$$4.95\% \times (\text{Previous Year's Operational Funding} - \text{Previous Year's Home Education Funding})$$

Up to a maximum amount of \$400,000

Allocation Criteria

1. In the case where the formula allocates more than \$400,000 to an authority, the maximum system administration funding this authority will receive will be capped at \$400,000.
2. The System Administration allocation amount provided to each accredited funded private school will be a fixed amount over the next three school years.

Section E – Funding for Private ECS Operators

E1 – Base Instruction Grant

E1.1 – Weighted Moving Average

Base instruction grants are allocated using the three-year **Weighted Moving Average** (WMA) enrolment of school authorities. Funding provided through the base instruction component does not allocate funding for specific **students** or schools. Rather, WMA enrolment is used to allocate funding for the Early Childhood Services (ECS)-Grade 12 instructional activities of the entire school authority. The three-year WMA enrolment is calculated as follows:

School Year	Weighted Factor	Enrolment Count (FTE)
2018/19	20%	Actual
2019/20	30%	Estimate
2020/21	50%	Projection

Example A: WMA calculation of a school authority with a growing **student** enrolment would be as follows:

School Year	Weighted Factor	Enrolment Count (FTE)
2018/19	20%	16,480
2019/20	30%	16,700
2020/21	50%	16,850
WMA Enrolment (FTE)	$(16,480 \times 20\% + 16,700 \times 30\% + 16,850 \times 50\%) = 16,731$	

Example B: WMA calculation of a school authority with a declining **student** enrolment would be as follows:

School Year	Weighted Factor	Enrolment Count (FTE)
2018/19	20%	5,460
2019/20	30%	5,400
2020/21	50%	5,350
WMA Enrolment (FTE)	$(5,460 \times 20\% + 5,400 \times 30\% + 5,350 \times 50\%) = 5,387$	

The projected enrolment count will be determined based on Alberta Education's calculations and input from school authorities.

The projected enrolment count used in the calculation of WMA for the budgeted school year will be compared against the actual September 30th enrolment count in December of the school year. However, there will be no in-year adjustments if the projected count is different from the actual count. The difference between the projected count and actual **student** count will be accounted for in the calculation of WMA for the subsequent school year. If the projected count is higher than the actual count, the WMA for next year will be adjusted down, and if the projected count is lower, the WMA for next year will be adjusted up to account for the difference.

If a jurisdiction is not compliant with the rules outlined in the funding manual, the department will adjust the funding allocation for the following school year in accordance with the audit result.

An example is provided in the table below:

Example WMA Calculation				
	2018-2019	2019-2020	2020-2021	2021-2022
Actual count	16,480	16,700	16,800	
Projected count			16,850	16,876
WMA for 2020-2021 funding calculations (calculated in Feb 2020 using 2020-2021 projected count)			20%*16,480 + 30%*16,700 + 50%* 16,850 = 16,731	
WMA verification for 2020-2021 (calculated in Dec 2020 using 2020-2021 actual count)			20%*16,480 + 30%*16,700 + 50%* 16,800 = 16,706	
WMA adjustment			16,731 – 16,706 = 25	
WMA for 2021-2022 (calculated in Feb 2021)				(20%*16,700 + 30%*16,800 + 50%*16,876) – 25 = 16,793

E1.2 – ECS Base Instruction Grant

ECS funding is allocated using the three-year Weighted Moving Average (WMA) enrolment of the school authority. This does not allocate funding for specific children/students.

Allocation Formula

Weighted Moving Average (WMA) Enrolment
x
ECS Base Instruction Rate

Allocation Criteria

1. A child who meets conditions a, b, c, and d unless e, f, g or h apply is counted toward WMA enrolment for the purposes of allocating ECS base instruction funding:
 - a. 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;
 - b. meets the minimum age requirements as set out in the following table:

Category of ECS Children	Type of ECS Funding Provided*	Minimum age of the child on September 1	Maximum age of the child on September 1
Kindergarten child	Base Instruction Funding (Maximum of 1 year funding)	4 years 8 months	Less than 6 years
ECS child with a mild/moderate disability/delay,	Base Instruction Funding and Mild/Moderate Funding (Maximum 2 years funding which includes the Kindergarten year)	3 years 8 months	Less than 6 years
ECS child who is gifted and talented	Base Instruction Funding and Gifted and Talented Funding (Maximum 2 years funding which includes the Kindergarten year)	3 years 8 months	Less than 6 years
ECS child with English as a Second Language (ESL) needs	Base Instruction Funding (Maximum 2 years funding which includes the Kindergarten year) and ESL Funding	3 years 8 months	Less than 6 years
ECS child with severe disabilities/delay	Base Instruction Funding (Maximum 3 years funding which includes the Kindergarten year) and PUF Funding	2 years 8 months	Less than 6 years
ECS child who is developmentally immature	Base Instruction Funding (Maximum 2 years funding)	4 years 8 months	Less than 7 years

*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.

- c. Is a resident of Alberta and has a parent who ordinarily resides in Alberta on the September count date;
- d. Is a Canadian citizen on the September count date; or
 - i. is lawfully admitted to Canada for permanent residence; or
 - ii. is a child of a Canadian citizen; or
 - iii. is a child of an individual who is lawfully admitted to Canada as a permanent or temporary resident; or
 - iv. is a 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
 - v. is a step-child of a Canadian citizen and is the biological or adopted child of the Canadian citizen's non-Canadian spouse or partner. The following documentation is required:

- vi. proof of application for permanent resident status and fee payment to Immigration, Refugees and Citizenship Canada (IRCC); or
 - vii. valid study permit for the child.
- e. For funding purposes, a First Nations child who resides on a reserve is not counted toward WMA enrolment.
 - f. An individual who is **developmentally immature** (code 10).
 - g. An individual who is at least 5 years 8 months but less than 7 years of age on September 1, and who is either coded severe or mild/moderate, gifted/talented, or ESL/Francisation, may be counted toward WMA enrolment 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.
 - h. An individual who is at least 4 years 8 months years of age, but less than 7 years old on September 1 may be counted toward WMA enrolment 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.
2. As per Section 21(2) of the *Education Act*, an authority “may provide an early childhood services program to a **student** who, as of September 1, is younger than 7 years of age, if the parent of the **student** and the board are of the opinion that the program will benefit the student.”
Children/students who were placed in the ECS program and have not yet accessed the maximum number of years of ECS programming that they are eligible to access, will be counted toward the WMA enrolment calculation for ECS.
 3. Private ECS operators must provide each **child** with:
 - a. **a minimum of 475 hours of ECS instruction (or a minimum of 400 hours for children identified as having severe disabilities or delay); and,**
 4. Private ECS operators providing less than 475 hours (or less than 400 hours for children identified as having severe disabilities or severe language delay) will not receive funding for that programming.
 5. 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 private ECS operator must be prepared to accept and organize programming for all **children** for whom programming is requested, including **children** with special needs.
 6. A **child** can only be included in the WMA calculation by one private ECS operator per year.
 7. Private ECS operators are eligible for one year of ECS Base Instruction Funding for Kindergarten **children**, who are at least 4 years 8 months of age and less than 6 years of age on September 1.
 8. Private ECS operators may only charge a fee to parents of **children** in a basic 475 hour program to offset non-instructional costs, such as supplies, snacks and field trips.
 9. Private 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.

E2 – Program Supports and Services

E2.1 –English as a Second Language Grant

The English as a Second Language (ESL) Grant is provided for **children/students** who require additional support in the English language.

Allocation Formula

$$\begin{array}{c} \text{ESL Weighted Moving Average (WMA) Enrolment} \\ \times \\ \text{ESL Rate} \end{array}$$

Allocation Criteria

1. English as a Second Language (ESL) funding is provided to private Early Childhood Services (ECS) operators for **children** who require additional English language supports and instruction.
2. Documentation of an assessment, conducted within the past 5 years, must be kept on file at the school/school authority that supports the need for additional English language supports. **Children** who have been assessed as needing English language supports must be coded as either Foreign born code 301 or Canadian born code 303.
3. Funding allocation for ESL is based on the Weighted Moving Average (WMA) enrolment count of eligible **children** (an ECS **child** is counted as 1).
4. **Children** included under PUF grant are not included in the ESL WMA enrolment calculation.
5. The calculation of ESL grant WMA enrolment will include the following **child**:
 - a. Aged 3 years 8 months as of September 1 of the school year;
 - b. Enrolled in ECS;
 - c. Coded as either ESL-Funded Foreign born (code 301) or ESL-Funded Canadian born (code 303); and
 - d. Has been included in the WMA enrolment calculation for five or fewer school years, irrespective of moves between school authorities/jurisdictions.

E2.2 – ECS Program Unit Funding (PUF) Grant

The Early Childhood Services (ECS) Program Unit Funding (PUF) Grant is provided to school authorities for each **child with a severe disability or severe language delay** who requires additional supports beyond that offered in a regular ECS program.

To be eligible for a maximum of three years of PUF, children must enter ECS at minimum age of 2 years 8 months.

Allocation Formula

ECS programs for children registered with codes 41 through 46:

$$\begin{array}{c} \text{Half-day: WMA of ECS children registered with codes 41 through 46} \\ \times \\ \text{Half-day rate for codes 41 to 46} \\ *** \\ \text{Full-day: WMA of ECS children registered with codes 41 through 46} \\ \times \\ \text{Full-day rate for codes 41 to 46} \end{array}$$

Note: 10% of ECS WMA code 47 enrolment will be funded in the same manner as codes 41-46. This 10% of WMA enrolment for code 47 will not be included in the calculation for code 47 below.

ECS programs for children registered with Code 47:

Half-day: WMA of ECS children registered with code 47

x

Half-day rate for code 47

Full-day: WMA of ECS children registered with code 47

x

Full-day rate for code 47

Allocation Criteria

1. PUF will be allocated to a Private ECS operator for each eligible **child with a severe disability or severe language delay** for a maximum of three years including the kindergarten year.
2. To be eligible for a maximum of three years funding, a **child with a severe disability or severe language delay** must enter ECS at the age of 2 years 8 months and be less than 6 years of age on September 1.
3. Private ECS operators must use the *Special Education Coding Criteria* to determine the **child's** eligibility for PUF and proper coding.
4. Private ECS operators are responsible for determining PUF eligibility. All required PUF eligibility documentation for each **child** must be completed and maintained at the Private ECS operator and be made available to Alberta Education upon request.
5. A **child's** eligibility for PUF will be based on all of the following:
 - a. Assessment by a qualified professional of a **severe disability or severe language delay**.
 - b. Documentation that demonstrates the severity of the impact the **child's** diagnosis has on the **child's** ability to participate and engage in learning in the ECS educational program.
6. All eligible **children** must be registered as of **September 30**. Funding will be based on weighted moving average (WMA) (see section D1.1 on calculation of WMA).
 - Note: The date by which school authorities must submit their PUF enrolment count has been moved from September 30, 2020 to December 1, 2020 for the 2020-21 school year only, to support school authorities' preparation to return to classrooms following the closure of classes in the 2019-20 school year.
7. A Private ECS operator may operate a full day educational program, totaling a minimum of 800 hours of **teacher-directed instruction** per year, and/or a half-day educational program, totaling a minimum 400 hours of teacher-directed instruction per year, under all of the following conditions:
 - a. An Alberta certificated teacher takes the lead role in program planning process and takes responsibility for ensuring each child receives instruction, services and supports in order to meet the IPP goals.
 - b. A program that does not provide a minimum of 400 hours of teacher-directed instruction will not be funded.
 - c. Programs of less than 800 hours but greater than 400 hours of teacher-directed instruction will be funded as a half-day.
8. For compliance and monitoring purposes, Alberta Education will conduct PUF eligibility verifications to include file documentation eligibility, program hour requirements, program delivery elements, IPP/ISP compliance, monitoring and evaluation through both desk and on site visitations.
9. Only one Private ECS operator will be allowed to register a PUF eligible **child** for the same time period.
10. Two separate 400 hour programs cannot be combined, or attended in two different authorities to create an 800 hour program

11. A **child** included in the WMA enrolment calculation for PUF shall not be included in the WMA enrolment calculation for ECS mild/moderate, refugee and ESL funding.

E2.3 – ECS Mild/Moderate Disabilities, Gifted, and Talented Grant

Allocation Formula

$$\begin{array}{c} \text{Weighted Moving Average (WMA) Enrolment of Children Identified as Having} \\ \text{Mild/Moderate Disabilities} \\ \times \\ \text{Mild/Moderate and Gifted and Talented Rate} \end{array}$$

Allocation Criteria

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. Funding allocation for **children** with mild/moderate disabilities/delays or those who are gifted and talented is based on the **Weighted Moving Average** (WMA) enrolment of eligible **children**.
3. **Children** included in the WMA enrolment calculation for this funding must be coded as:
 - a. Code 30 mild/moderate disabilities/delays; or,
 - b. Code 80 gifted and talented
4. School authorities will use the Special Education Coding Criteria to determine the **child's** eligibility and correct coding.
5. Funding is available for a maximum of two years, which includes one year of Kindergarten.

E3 – School-Based Grants

E3.1 – ECS Operations and Maintenance Grant

The Operations and Maintenance (O & M) Grant is provided to school authorities to address the authority's responsibility for operation and maintenance, safety and security of all school buildings, including costs relating to the supervision of this program.

Allocation Formula

$$\begin{array}{c} \text{Weighted Moving Average (WMA) Enrolment} \\ \times \\ \text{Operations and Maintenance Rate} \end{array}$$

Allocation Criteria

1. The **Weighted Moving Average** (WMA) enrolment is calculated as per section E1.1.
2. For more information on the allocation of Operations and Maintenance costs, please refer to Section C3.1.

E3.2 – ECS Transportation Grant

Allocation Formula & Criteria

1. The *School Transportation Regulation* provides the requirements and eligibility for **students** and Early Childhood Services (ECS) transportation.
2. The transportation grant allocation is held constant at the 2019/20 level until a new transportation model has been developed and implemented.
3. Transportation agreements between school authorities and/or private ECS operators that are in existence for the 2019/20 school year are to be met for the 2020/21 school year as well. Funding for these **children/students** will be claimed by the school jurisdictions providing the transportation service. If there are changes to these agreements, the allocation will be adjusted by the department.

Documentation Requirements

ECS operators are to maintain records of:

- a. names of children transported;
- b. number of days each individual child is transported;
- c. copies of completed route risk assessment forms;
- d. actual costs of transportation; and
- e. special transportation provided.

E3.3 – ECS SuperNet Service Funding

Please refer to [Section C3.3](#) (SuperNet Service Funding).

E4 – System Administration

E4.1 – ECS System Administration Grant

For more information on what is considered to be **System Administration** cost, please refer to section C5.1.

Allocation Formula

**4.95% x Previous Year's Operational Funding
(up to a maximum amount of \$400,000)**

Allocation Criteria

1. Private ECS operators will receive 4.95% of their previous year's operational funding up to a maximum amount of \$400,000.
2. In the case where the formula allocates more than \$400,000 to authority Private ECS Operator, the maximum system administration funding this authority will receive will be capped at \$400,000.
3. In the case where the formula allocates less than \$400,000 to a private ECS Operator, the maximum system administration funding this authority will be permitted to spend on System Administration will be \$400,000.
4. The System Administration allocation amount provided to each private ECS operator will be a fixed amount over the next three school years.

5. **System Administration** is a targeted and dedicated allocation:
 - a. Transfer of funds from other grants to System Administration is not permitted.
 - b. Funds can be transferred from System Administration to other grants.
6. In the case where the Audited Financial Statement of an authority indicates that System Administration expenditure exceeded the allocated amount, Alberta Education will deduct the amount by which the expenditure exceeds the allocated amount from this authority's operational funding in the following school year.

Section F - Federal French Funding: Early Childhood Services (ECS) to Grade 12

Under the *Protocol for Agreements for Minority-Language Education and Second-Language Instruction 2019-20 to 2022-23* (protocol) and *Canada-Alberta Agreement on Minority-Language Education and Second-Language Instruction 2020-21 to 2022-23* (bilateral agreement), Alberta receives federal funding to further support French-as-a-first-language education (minority language) and French-as-a-second-language (second language) instruction across Alberta. The bilateral agreement's action plan identifies specific initiatives and/or programs for funding under one or more of the following areas of intervention:

- Learner participation
- Provision of programs
- Academic achievement of learners
- Enriched learning environments
- Support for education staff
- Research

In the protocol and bilateral agreement, allocations for minority-language education and second-language instruction are set at \$5,310,966 and \$8,894,859, respectively. The protocol also identifies an additional annual increase of \$1,598,423 for minority-language education during the term of the protocol. The additional funding for minority-language education from 2019-2020 will be disbursed to Alberta in 2020-2021, in addition to the increase for this year. This overall funding for minority-language education (\$8,507,812) and second-language instruction (\$8,894,859) in 2020-2021 is split between Education and Advanced Education at 77 per cent and 23 per cent, respectively. As such, Education will receive \$6,551,015 for minority-language education and \$6,849,041 for second-language instruction this year.

The Department of Education will advise each school authority and private school of their annual allocation(s) of federal funding in the spring for the following school year using the student FTE calculations, finalized on February 3rd prior to the start of the school year. Payments will be issued in two installments during the school year: an initial installment in October 2020 and the remaining installment in September 2021.

In order to receive the initial payment of federal French funding, all funding recipients must complete an *Official Languages in Education Programs (OLEP) Commitment Form* **by August 31, 2020**. In order to receive the final payment, school authorities and private schools must complete an *OLEP Report* **by August 31, 2021** for the 2020-2021 school year. Both forms are available on [Alberta's OLEP web page](#).

Please note that in order to provide value, allocations less than \$1000 will not be issued, and will be redistributed to remaining participating school authorities and private schools.

F1 - Individual Teacher Bursary program

Developed and administered by the Department of Education, \$300,000 of federal funding is provided to eligible teachers each year for post-secondary courses, training and professional development in French. Of the federal funding allocated to ECS-Grade 12 minority-language education, \$80,000 is allocated towards the Individual Teacher Bursary program for teachers teaching within a francophone school. Of the federal funding allocated to ECS-Grade 12 second-language instruction, \$220,000 is allocated towards the Individual Teacher Bursary program for French as a second language teachers.

F2 - Quebec-Alberta Exchange program

Developed and administered by the Department of Education, \$20,000 of federal funding for second-language instruction is provided for eligible high-school students to participate in this program.

F3 - Francophone Regional Authority Funding (Grant Code 221)

Under the *Canada-Alberta Agreement on Minority-Language Education and Second-Language Instruction*, 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.

The funding allocation for ECS – Grade 12 minority-language education is distributed to Francophone Regional Authorities as block funding. For the 2020-2021 school year, Francophone Regional Authorities will receive \$6,471,015 of overall federal funding received by Alberta, in addition to the \$80,000 allocated to eligible teachers teaching within a francophone school under the Individual Teacher Bursary program..

The *Fédération des conseils scolaires francophones de l'Alberta (FCSFA)*, which is mandated by its board members to act on behalf of the francophone regional authorities, provides the Department of Education with the proposed allocation of federal funding for minority-language education projects and funding for all four francophone authorities.

F4 - French Second Language School Authority Funding (Grant Codes 211 and 230)

Under the *Canada-Alberta Agreement on Minority-Language Education and Second-Language Instruction*, school authorities may receive federal funds for providing instruction in French for funded children/students in ECS to grade 12 in the following categories:

1. **Alternative French Language Programs:** French programs offered under Section 17(2) and 19 (1)(a) of the *Education Act*, including French Immersion; and
2. **French as a Second Language courses:** French courses offered under Section 17 and 18 of the *Education Act*.

1. Alternative French Language Programs: Grant code 211

In order to receive full funding as a 1.0 Full-Time Equivalent (FTE) child/student, the minimum instructional hours to be provided for in French are:

- ECS: 350 hours per year
- Grade 1 to 6: 712 hours per year
- Grade 7 to 9: 570 hours per year
- Grades 10 to 12: 600 hours per year

The minimum instructional hours in French to access partial federal French funding are:

- ECS: 238 hours/year
- Grades 1 to 6: 475 hours per year
- Grades 7 to 9: 380 hours per year
- Grades 10 to 12: 200 hours per year and/or a minimum of 10 credits in an alternative French program.

For children/students with access to less French instruction than identified above, use the applicable French as a second language funding rate below.

2. French as a Second Language Courses: Grant code 230

Students enrolled in FSL courses receive federal French funds in alignment with the hours of instruction.

Allocation Formula

The allocation formula below is used to calculate federal French funding allocations for:

- Alternative French programs that do not meet the minimum instructional hours for a full 1.0 FTE and;
- French as a second language courses.

ECS to Grade 9 Allocation Formula

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

Grades 10 to 12 Allocation Formula

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

Funding Rates per FTE Funded Students for School Authorities and Charter Schools

The funding rates below apply for each public, separate and charter school authority offering alternative French programs and/or French as a second language courses. Note that these rates are subject to change each year with respect to the new student FTE numbers.

Alternative French – Grant Code 211		French as a Second Language* – Grant Code 230	
Number of FTE funded students	Funding rate per FTE funded student	Number of FTE funded students	Funding rate per FTE funded student
9-99	\$ 124.70	11-49	\$ 94.70
100-199	\$ 123.70	50-99	\$ 93.70
200-299	\$ 122.70	100-399	\$ 92.70
300-399	\$ 121.60	400-699	\$ 91.60
400-499	\$ 120.60	700-999	\$ 90.60
500-599	\$ 119.50	1000-1299	\$ 89.50
600-699	\$ 118.50	1300-1599	\$ 88.50
700-799	\$ 117.50	1600-1999	\$ 87.50
800-899	\$ 116.50	2000-2999	\$ 86.50
900-999	\$ 115.40	3000-3999	\$ 85.40
1000+	\$ 114.40	4000+	\$ 84.40

*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 above.

Funding Rates per FTE Funded Students for Independent (Private) Schools

The funding rates below apply for each independent (private) school offering alternative French programs and/or French as a second language courses. Note that these rates are subject to change each year with respect to the new student FTE numbers.

Alternative French – Grant Code 211		French as a Second Language* – Grant Code 230	
Number of FTE funded students	Funding rate per FTE funded student	Number of FTE funded students	Funding rate per FTE funded student
12-99	\$ 87.29	16-49	\$ 66.29
100-199	\$ 86.59	50-99	\$ 65.59
200-299	\$ 85.89	100-399	\$ 64.89
300-399	\$ 85.12	400-699	\$ 64.12
400-499	\$ 84.42	700-999	\$ 63.42
500-599	\$ 83.65	1000-1299	\$ 62.65
600-699	\$ 82.95	1300-1599	\$ 61.95
700-799	\$ 82.25	1600-1999	\$ 61.25
800-899	\$ 81.55	2000-2999	\$ 60.55
900-999	\$ 80.78	3000-3999	\$ 59.78
1000+	\$ 80.08	4000+	\$ 59.08

*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 above.

F5 - Project Funding

For second-language projects, each year a portion of second-language funds is set aside. Funding is allocated to multi-board and/or third-party projects that are collaborative. School authorities wishing to initiate a new project can contact the Alberta Official Languages in Education Programs (OLEP) office:

Hours: 8:15 am to 4:30 pm (open Monday to Friday, closed statutory holidays)

Phone: [780-427-2940](tel:780-427-2940)

Toll free: [310-0000](tel:310-0000) before the phone number (in Alberta)

Email: EDC.officiallang@gov.ab.ca

** Please note that any funding recipient uncompliant with requests for information (i.e., non-completion of Commitment Form and/or Financial Statement) will automatically forgo future payments under OLEP.*

Section G - Other Provincial Support Funding

G1 – Regional Consortium 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

G2 – 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 teachers, educators and school authorities. 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 education 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. 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.
4. 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.

Priority Setting

Annually, in the spring of each calendar year, priorities for professional learning supports will be identified by consortia in collaboration with Alberta Education and approved by Minister.

Reporting

Each Consortia will submit to School Finance a final report and financial statement by December 31 each year that outlines the outcomes achieved in the previous school year as it relates to each priority, including a summary of expenditures for each priority area and expenses related to infrastructure and administration of consortia activities.

Section H – Payments to School Authorities

H1 – School Authorities Funding Rates

H1.1 - Funding Rates for School Jurisdictions

Funding Rates for School Jurisdictions		2020/21 School Year
Note: The new funding model does not allocate funding for specific students or schools. Rather, WMA enrolment (wherever applicable) is used to allocate funding for the Early Childhood Services (ECS) to Grade 12 students educational activities of the entire school jurisdiction.		
Base Instruction (WMA Rate)		
ECS Base Instruction		\$3,032.00
Grades 1 to 9 Base Instruction		\$6,064.00
Grades 10 to 12 (Year 1 - 3)		\$6,670.40
		\$3,335.20
Grades 10 to 12 (Year 4)		
Grades 10 to 12 (Year 5 and above)		\$1,667.60
Summer School (per completed credit)		\$143.00
Home Education		\$1,700.00
Shared Responsibility		\$700.00
Outreach (per School Jurisdiction)		\$150,000.00
Distance Education		
Grade 10 to 12 - Online (> = 30 Credits)		\$6,670.40
Grade 10 to 12 - Online (< 30 Credits)		\$1,000.00
Distance Education (Non Primary Registration)		
35 to 100 Students		\$50,000.00
101 to 250 Students		\$175,000.00
251 to 500 Students		\$375,000.00
500 + Students		\$500,000.00

Rural Small Schools Grant (See Section C 1.8)	
Group 1 (<35 students) and Hutterite Colony Schools	\$25,000.00+Base Instruction Funding Per WMA FTE
Group 2 (=>35 <55)	\$450,000.00
Group 3 (=> 55 < 75)	\$620,000.00
Group 4 (=> 75 < 95)	\$750,000.00
Group 5 (=> 95 < 115)	\$860,000.00
Group 6 (=> 115 < 135)	\$940,000.00
Group 7 (=> 135 < 155)	\$1,000,000.00
Services & Supports Grants	
Specialized Learning Support (see Section C.2.1)	
Base Allocation	per formula
WMA FTE Rate	\$425.00
Jurisdiction Composition Allocation	per formula
Student Wellness Program	per formula
Specialized Learning Support - Charter Schools	
WMA Student Rate	\$212.50
Jurisdiction Composition Allocation	per formula
Student Wellness Program	per formula
English as a Second Language (WMA FTE Rate)	\$1,200.00
Francisation (WMA FTE Rate)	\$1,200.00
Refugee Student Grant (WMA FTE Rate)	\$5,500.00
Education Program in an Institution (see Section C 2.5)	3 Year Average net cost of approved programs or 2019/20 Budgeted Allocation
ECS Program Unit Funding (PUF)	
Code (41 to 46)	
Half Day (Minimum of 400 Hours)	\$15,000.00
Full Day (Minimum of 800 Hours)	\$25,000.00
Code 47	
Half Day (Minimum of 400 Hours)	\$10,000.00
Full Day (Minimum of 800 Hours)	\$17,000.00

First Nations, Métis and Inuit Education	
Truth and Reconciliation Support	per formula
FNMI Student Support Self-Identified (WMA Rate)	\$1,200.00
FNMI Student Support (Census Adjustment)	per formula
School Based Grants	
Operations & Maintenance Grant	
Student Allocation (WMA FTE Rate)	\$218.00
Alternative Programs in privately owned space (WMA FTE Rate)	\$654.00
Utilized Area (per square meter)	\$65.00
Underutilized Area (per square meter)	\$46.00
Charter Schools (WMA FTE Rate)	\$800.00
Transportation Grant	2019/20 SY Allocation × 1.05
SuperNet Services (max. per month per approved site)	\$800.00
Community Based Grants	
Socio- Economic Status Grant (See Section C4)	per formula
Geographic Grant (See Section C4)	per formula
School Nutrition Grant	
WMA Category (Non-Metro Authorities)	WMA Allocation
More than 5,000	\$150,000.00
2,501 to 5,000	\$100,000.00
1,001 to 2,500	\$50,000.00
1,000 or less	\$10,000.00
WMA Category (Metro Authorities)	
More than 75,000	\$1,200,000.00
75,000 or less	\$550,000.00
SES Category (Non-Metro Authorities)	
Five (Lowest SES)	\$200,000.00
Four	\$125,000.00
Three	\$100,000.00
Two	\$50,000.00
SES Category (Metro Authorities)	
Two to Five	\$100,000.00
Francophone Equivalency Access (WMA FTE Rate)	\$250.00

Fort McMurray Allowance (per eligible FTE employee)	\$1,040.00
Jurisdiction Based Grants	
System Administration Rate (See Section C5)	per formula

H1.2 - Funding Rates for Accredited Funded Private Schools

Funding Rates for Accredited Funded Private Schools		2020/21 School Year
Note: The new funding model does not allocate funding for specific students or schools. Rather, WMA enrolment (wherever applicable) is used to allocate funding for the Early Childhood Services (ECS) to Grade 12 students educational activities of the entire school authority.		
Base Instruction (WMA Rate)		
ECS Base Instruction		\$3,032.00
Grades 1 to 9 Base Instruction		\$4,244.80
Grades 10 to 12 (Year 1 - 3)		\$4,669.28
Grades 10 to 12 (Year 4)		\$2,334.64
Grades 10 to 12 (Year 5 and above)		\$1,167.32
Summer School (per completed credit)		\$100.10
Heritage Language Schools (per completed credit)		\$173.00
Home Education		\$1,700.00
- Shared Responsibility		\$700.00
Distance Education		
Grade 10 to 12 - Online (> = 30 Completed Credits)		\$4,669.28
Grade 10 to 12 - Online (< 30 Completed Credits)		\$700.00
Distance Education (Non Primary Registration)		
35 to 100 Students		\$35,000.00
101 to 250 Students		\$122,500.00
251 to 500 Students		\$262,500.00
500 + Students		\$350,000.00

Base Instruction Funding for Designated Special Education Private Schools (DSEPS)	
Funding rate for students with a mild or moderate disability	\$11,639.00
Students with severe disabilities in DSEPS (not including severe disabilities funding).	\$7,537.59
Services & Supports Grants	
Severe Disabilities Funding (per eligible funded student)	\$16,465.00
Mild/Moderate Disabilities/Delays, Gifted and Talented (WMA Rate)	\$2,486.76
English as a Second Language (WMA FTE Rate)	\$840.00
Education Program in an Institution (see Section C 2.5)	3 Year Average net cost of approved programs or 2019/20 Budgeted Allocation
ECS Program Unit Funding (PUF)	
Code (41 to 46)	
Half Day (Minimum of 400 Hours)	\$15,000.00
Full Day (Minimum of 800 Hours)	\$25,000.00
Code 47	
Half Day (Minimum of 400 Hours)	\$10,000.00
Full Day (Minimum of 800 Hours)	\$17,000.00
First Nations, Métis and Inuit Education	
FNMI Student Support Self-Identified (WMA FTE Rate)	\$840.00
School Based Grants	
Operations & Maintenance Grant (WMA FTE Rate)	\$560.00
Transportation Grant	2019/20 SY Allocation
SuperNet Services (max. per month per approved site)	\$560.00

Community Based Grants	
Community Supports Grant	
Base Funding	\$8,750.00
DSEPS Schools (WMA FTE Rate)	\$150.00
Other Private Schools	\$75.00
Authority Based Grants	
System Administration Rate (See Section D4)	per formula

H1.3 - Funding Rates for Private ECS Operators

Funding Rates for Private ECS Operators		2020/21 School Year
Note: The new funding model does not allocate funding for specific students or schools. Rather, WMA enrolment (wherever applicable) is used to allocate funding for the Early Childhood Services (ECS) to Grade 12 students educational activities of the entire school jurisdiction.		
Base Instruction (WMA Rate)		
ECS Base Instruction		\$3,032.00
Services & Supports Grants		
English as a Second Language (WMA Rate)		\$600.00
ECS Program Unit Funding (PUF)		
Code (41 to 46)		
Half Day (Minimum of 400 Hours)		\$15,000.00
Full Day (Minimum of 800 Hours)		\$25,000.00
Code 47		
Half Day (Minimum of 400 Hours)		\$10,000.00
Full Day (Minimum of 800 Hours)		\$17,000.00
Mild/Moderate Disabilities/Delays, Gifted and Talented (WMA Rate)		\$2,486.76

School Based Grants	
Operations & Maintenance Grant (WMA Rate)	\$560.00
Transportation Grant	2019/20 SY Allocation
SuperNet Services (max. per month per approved site)	\$400.00
Authority Based Grants	
System Administration Rate (See Section E4)	per formula

H2 – Payment Schedules

H2.1 — School Jurisdictions

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)

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**.
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**.

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 repay 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.

Fees and Deductions

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:

SECTION C – School Jurisdiction Funding 1.2, 1.3, 1.5 to 1.8, 2.1 to 2.7, 3.1 to 3.3, 4.1 to 4.5 and 5.1.	
September 15, 2020	March 31, 2021
October 15, 2020	April 15, 2021
November 16, 2020	May 17, 2021
December 15, 2020	June 15, 2021
January 15, 2021	July 15, 2021
February 16, 2021	August 16, 2021
March 05, 2021	

The monthly payments will be calculated using the allocation amounts on the commitment letters sent to **school jurisdictions**.

Any adjustments for the current school year such as audit results or the projected counts for WMA being higher or lower will be adjusted in the next school year commitment amounts.

SECTION C1.4 – Summer School Funding

September/October ⇔ 100% of amount earned in prior school year

SECTION F – Federal French Language Funding

March/April ⇔ 100%

SECTION G – Other Provincial Support Funding

G1 – Regional Consortium Management and Infrastructure

September ⇔ 70%

March/April* ⇔ 100% less previous payment

*Payment is contingent on receipt of the previous school year Statement of Revenues and Expenses.

G2 – Regional Consortium, 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 I – Infrastructure Maintenance and Renewal (IMR)

I1 - School Facilities

Payments processed by Alberta Infrastructure

I2 – Infrastructure Maintenance and Renewal (IMR)

September ⇔ Up to 50%

By April 30 ⇔ 100% less previous payment.

H2.2 – Accredited Funded Private Schools

SECTION D – Accredited Funded Private School Funding

The funding provided by Alberta Education to **accredited funded private schools** allocated according to the schedules below - provided all conditions have been met. Payments to **accredited funded private schools** will be on a monthly basis at 10 per cent per month for the period September to June and received on the 5th last working day of the month (based on electronic deposit). 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 and the authority must be in active status according to Corporate Registries with their annual returns up to date before the first payment is made.

Payment Receipt Dates for the following:

SECTION D – Accredited Funded Private Schools 1.2, 1.3, 1.5 to 1.7, 2.1 to 2.5, 3.1, 3.2, 4.1 & 5.1.	
September 24, 2020	February 22, 2021
October 26, 2020	March 25, 2021
November 24, 2020	April 26, 2021
December 24, 2020	May 25, 2021
January 25, 2021	June 24, 2021

The monthly payments will be calculated using the allocation amounts on the commitment letters sent to **accredited funded private schools**.

Any adjustments for the current school year such as audit results or the projected counts for WMA being higher or lower will be adjusted in the next school year commitment amounts.

SECTION D1.4 – Summer School Funding

September/October ↔ 100% of amount earned in prior school year

SECTION F – Federal French Language Funding

March/April ↔ 100%

H2.3 – Private ECS Operators

SECTION E – 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 on a monthly basis at 10 per cent per month for the period September to June and received on the 5th last working day of the month (based on electronic deposit). 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 and the authority must be in active status according to Corporate Registries with their annual returns up to date before the first payment is made.

The Initial Operating Plan (IOP) or the Annual Operating Plan (AOP) must be received and approved before the first payment is made.

Payment Receipt Dates for the following:

SECTION E – Private ECS Operators	
September 24, 2020	February 22, 2021
October 26, 2020	March 25, 2021
November 24, 2020	April 26, 2021
December 24, 2020	May 25, 2021
January 25, 2021	June 24, 2021

The monthly payments will be calculated using the allocation amounts on the commitment letters sent to **private ECS operators**.

Any adjustments for the current school year such as audit results or the projected counts for WMA being higher or lower will be adjusted in the next school year commitment amounts.

SECTION F – Federal French Language Funding	
Oct 2020	↔ 80 %
Sept 2021	↔ 20 %

H3 – 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 children and students in Grades ECS 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 **child/student** enrolment data submitted to PASI and Student Records Branch. **Children/Students** enrolled after the **September count date** will not be counted for towards the WMA
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 **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 **child/student** was enrolled and in attendance within five calendar days of the **September count date**.
 5. **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. A priority school conflict (PSC) occurs when more than one **school** claims the **child/ student** on the **September count date**. In the situation that more than one **school** is claiming the same **child/student** for funding purposes, the priority **school** is the **school** in which a **child/student** is deemed to have been enrolled and in attendance on the **September count date**.
 7. The primary registration is the registration at the priority school at the September Count date.
 8. Priority school conflicts must be resolved before a **school authority** is entitled to count the **child/student** towards the WMA. 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.

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 **child's/student's** last day of attending **school** and registration forms for new children/students.
- b. 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.
- c. In situations where instructional minutes are the same for two **school authorities** or PSCs are unresolved at the deadline, the responsible school in PASI at the **September count date** will be deemed the priority.

For Grades 10 to 12

- a. Instructional minutes shall be based on the number of credits for all the courses that the **student** was registered in at the school during the first **term** and half credits for **term 3 and** continuous sections.
- b. In resolving priority school conflicts, the priority school will be determined as follows:
 - i. The school where the **student** was enrolled, and in attendance, on the **September count date**;

- ii. If the **student** was enrolled, and in attendance, in two or more **school authorities** on the **September count date**:
- The school where the **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** or PSCs are unresolved at the deadline, the responsible school in PASI at the **September count date** will be deemed the priority.

Section I – Capital Funding

I1 – School Facilities (School Jurisdictions)

Payment Processing for School Facilities transferred to Alberta Infrastructure effective April 1, 2018.

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; and
 - 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](#)

I2 – 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% enrolment;
 - b. 24% age of the building;
 - c. 24% eligible school space; and
 - d. 2% 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. a **child** in Early Childhood Services (ECS) 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; and
 - 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](#)

Section J – General Conditions, Reporting Requirements and Additional Information

J1 – General Financial Conditions

General terms and conditions related to the financial responsibilities related to funding are listed below. These terms and conditions must be met by all school authorities.

The provincial government provides funding and delegates responsibility to school authorities to provide education programs to students. This delegation comes with an obligation to answer for, and publicly report on, the spending of public funds and the results achieved by the school authority through the discharge of their responsibilities. School authorities are responsible for providing assurance to the Department, their local stakeholders and the public that they are fulfilling their responsibilities and students are successful. School authorities provide evidence of fiscal responsibility and effective stewardship of resources through their budgets and audited financial statements.

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. See **Section B Assurance Framework**.

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 at a **school authority**.

An annual compliance and monitoring program will include enrolment verification desk audits and on-site monitoring and other reviews of potential risk areas.

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**.

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 and Accredited Funded Private School** 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.

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.

Funding provided to support ECS to Grade 12 programs cannot be used to support courses, programs or training for adults (20 years and older).

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 and cash equivalents, scholarships, or capital assets where the primary or sole criteria is completion of a certain number of courses or credits.

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.

School authorities who have received funding from Alberta Education to provide an **educational program** and subsequently cease operations may be required to return a portion of their accumulated operating surplus to the Government of Alberta.

1. When funding has been provided by Alberta Education to a **school authority**, and they cease operations, any surplus funds shall be returned to the Government of Alberta or if a **Private ECS operator** transferred to another approved **Private ECS operator**.
2. If a **Private ECS operator** decides to cease operations, the operator may determine if another **Private ECS operator** is willing to take over the program. The other **Private 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. Alberta Education will calculate the amount of surplus (if any) from operations to be returned to the Government of Alberta.
4. The **school authority** must prepare an Audited Financial Statement (AFS) (for **Private ECS Operators**, similar statements to the previous two years) 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.
5. If a **school authority** ceases operations during the **school year**, unexpended fees paid by parents for the year must be returned to the **parents**.
6. The **school authority** 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 **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.

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.

J2 – Accumulated Deficit from Operations (ADO)

School Boards and Charters

1. 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.
2. 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.

Private Schools and Private ECS Operators

1. 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.
2. 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.

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**.

J3 — Reporting Requirements and Information

Accredited Funded Private Schools

1. 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**.
2. 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.
3. 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.
4. **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.
5. **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 for Early Childhood Services (ECS) and Grades 1-12 will be allocated using the Weighted Moving Average (WMA) enrolment of the school authority.
3. Student registration information in ECS and Grades 1-12 as of the **September count date** must be submitted to PASI and Student Records by the third business day in October;
4. The ages of all **students** and **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 December 31, 2020.
2. Base funding for **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).

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.

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. **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 December 31, to be counted towards the WMA.
3. **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.
4. 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.
5. **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.
6. **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.

English as a Second Language (ESL)

1. Student registration information for ECS to Grade 12 as of the **September count date** 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 **child** or **student** (code 303);
 - b. Foreign-born **child** or **student** (code 301); and
 - c. Canadian-born or foreign-born child/student who does not meet the criteria as a **child** or **student** (code 302).
3. Code 303 and/or code 301 are required for **school authorities' child(ren)/student(s)** to be counted towards the **ESL WMA**.

First Nations

School authorities with **students** attending First Nations schools under an **education services agreement** are eligible for all relevant grants based on student information provided on Form 20AE1.

Francisation

1. Student registration information for ECS to Grade 12 as of the **September count date** 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' child(ren)/student(s)** to be counted towards the **Francisation WMA**.

Home Education

1. Home education funding is based on 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.

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)

All school authorities must report 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.

J4 - 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
Funding Analysis	George Lee Keith Bowen	(780) 415-8325 (780) 644-3275
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	Marni Pearce	(780) 422-2486
School Finance	Daimen Tan Sharon Johnson William Poon	(780) 422-0865 (780) 422-0930 (780) 427-2055
Technology Leadership Branch	Dave Hauschildt	(780) 415-0824
Workforce Development Help Desk wfdhelpdesk@gov.ab.ca	Help Desk	(780) 427-5318

Any of the individuals above may be contacted by email by typing their first name, dot (.), last name followed by @gov.ab.ca, (e.g., daimen.tan@gov.ab.ca). The exception to this rule is Ron Taylor who can be contacted by email at RTaylor@gov.ab.ca.

The *2020/21 Funding Manual for School Authorities* is available for viewing and printing on Alberta Education's website at <https://open.alberta.ca/publications/1485-5542>

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

J5 – New Private School Authorities, School Jurisdictions and Private ECS Operators

New private school authorities, school jurisdictions and private ECS operators will not have historical enrolment data and reliable projection data to calculate WMA. To accommodate this during the first 3 years of operations, funding allocations for these authorities will be based on actual enrolments. The table below summarizes enrolments used for calculating the funding:

Year 1 of operation	100% of enrolment count on September 30 of their first school year of operation
Year 2 of operation	70% of Sept. 30 enrolment of Year 2 + 30% enrolment of Year 1
Year 3 of operation	50% of Sept. 30 enrolment of Year 3 + 30% enrolment of Year 2 + 20% enrolment of Year 1
Year 4 of operation	Regular WMA method – 50% of projections for Year 4 + 30% enrolment of Year 3 + 20% enrolment of Year 2

Note: children/students who will be included in these enrolment counts will be same as those counted toward the WMA enrolment calculation.

For the first 3 years, these schools will not receive a funding commitment letter in March, but rather in late fall once the enrolment has been verified.

School Jurisdictions taking over operations of existing schools

If a school jurisdiction takes over the operations of an existing school that was not operating under them the previous year, the WMA for the school jurisdiction will be adjusted to include the historical enrolment of this school; and when a school transfers out of a school jurisdiction, the historical enrolments from the school will be excluded from the WMA calculation.

Changes to school programing

Additionally, WMA is calculated under the assumption that programs offered by school jurisdictions in the budgeted school year will be similar to the current and past year. In case where the programs offered changes (e.g. stoppage of a program), the WMA calculations will be adjusted to capture this change.

For school authorities after the September 30 count date write to School Finance Branch confirming your enrolments and request an adjustment for these enrolments based on actual enrolments as an in-year adjustment to your funding allocation.

J6 - 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.

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.

J7 - 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.

J8 - 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**.

Section K – Requirements for School Authority Planning and Results Reporting

School Authority Planning & Reporting

Pursuant to the *Government Organization Act* and the *Education Act*, and to operationalize the accountability relationships and processes established in provincial legislation (See Section B, Legislative Authority), this section contains the Minister's requirements for school authorities' Education Plans and Annual Education Results Reports (AERRs).

The planning and reporting processes that school authorities use should reflect the guiding principles, domains and enabling processes outlined in the Assurance Framework. Effective planning and results reporting occurs in a continuous improvement cycle and are integral to school authority accountability and assurance. The planning and reporting cycle (see graphic below) involves:

- Developing/updating plans based on results, contextual information and provincial direction
- Incorporating stakeholder input based on engagement activities at various points throughout the process, as appropriate
- Preparing budgets that allocate or re-direct resources to achieve priorities and meet responsibilities
- Implementing research and practice-informed strategies to maintain or improve performance within and across domains and focused on student growth and achievement
- Monitoring implementation and adjusting efforts as needed
- Measuring, analyzing and reporting results
- Using results to identify areas for improvement and to develop strategies and targets for the next plan (i.e. evidence-informed decision making)
- Communicating and engaging with stakeholders about school authority plans and results



Education Plans and Annual Education Results Reports (AERRs) are products and evidence of this continuous improvement process and are core documents for demonstrating accountability and providing assurance. The Education Plan sets out what needs to be done, including determining priorities, outcomes, measures and strategies using the most recent results, while the AERR provides the results obtained from implementing the plan and actions taken to meet responsibilities in the key assurance domains.

Alberta Education has selected a set of required provincial measures and developed reporting requirements for each assurance domain consistent with the descriptions above and key responsibilities outlined in legislation. The required provincial measures assess performance broadly and consistently across all school authorities. For the required local component, school authorities describe processes, programs/services, strategies, and locally identified measures/data, to demonstrate how and to what extent, they are meeting their responsibilities in each domain. This also helps demonstrate that school authorities are considering and responding to their local context.

School authorities report their performance on required provincial and locally identified measures and the actions they have taken to meet their responsibilities in each domain in their AERR and use the results to develop and/or update their Education Plan. These components, with the combination of standard and context-specific information, help provide a balanced and holistic account of school authority performance. These requirements are outlined in the following table:

Domain	Required Provincial Measure	Required Local Components
Student Growth & Achievement	<ul style="list-style-type: none"> Provincial Achievement Test results Diploma Exam results High School Completion results Survey measures of Citizenship and <i>Academic Engagement</i>* 	
Teaching & Leading	<ul style="list-style-type: none"> Survey measure of Education Quality 	<ul style="list-style-type: none"> Processes, strategies, local measures/data to demonstrate that the school authority supports teaching and leadership quality through professional learning, supervision and evaluation processes.
Learning Supports	<ul style="list-style-type: none"> Survey measures of Safe & Caring, <i>Student Inclusion</i> and <i>Access to Supports & Services</i>. 	<ul style="list-style-type: none"> Programs, services, strategies and local measures/data used to demonstrate that the school authority is improving First Nations, Métis and Inuit student success and ensuring all students, teachers and school leaders learn about First Nations, Métis and Inuit perspectives and experiences, treaties, agreements, and the history and legacy of residential schools. Programs, services, strategies and local measures/data used to demonstrate that all students have access to a continuum of supports and services, including specialized supports and services, consistent with the principles of inclusive education.
Governance	<ul style="list-style-type: none"> Survey measure of Parent Involvement School authorities provide the amount budgeted for 2020/2021, the amount spent and the variance between these amounts for 	<ul style="list-style-type: none"> Processes, strategies and local measures /data to demonstrate that the school authority has effectively managed its resources including, collaboration with other school authorities,

Domain	Required Provincial Measure	Required Local Components
	operational expense categories.	<ul style="list-style-type: none"> municipalities and community agencies. Processes, strategies and local measures/data to demonstrate that stakeholders were engaged to develop priorities and share progress and results, including how the school board met its obligations under the <i>School Councils Regulation</i>, section 12.
Local & Societal Context		<ul style="list-style-type: none"> Information about the school authority, students, staff and communities served (such as demographic or socio-economic data) that provides context for the plan and report.
	*Note: Measures in italics are under development	

Beyond these required components, school authorities may include other information that they consider appropriate to demonstrate their progress in meeting their responsibilities and providing assurance.

In addition to the required provincial measures, Alberta Education provides results for a number of supplemental measures that school authorities can use for the Education Plan and AERR as they deem appropriate. Required and supplemental provincial measures will be drawn initially from those used in the Accountability Pillar, with new measures being developed and implemented over time.

School authorities are expected to engage in evidence-informed decision making and the Education Plan and AERR should demonstrate this. Through the process of developing the AERR, school authorities collect, analyze, and evaluate key performance data arising from the implementation of their Education Plan and the actions taken to meet their responsibilities in each assurance domain. This includes results from provincial measures (required or supplemental) and any locally developed or selected measures used to assess progress on their priorities and within the domains. School authorities analyze their data, considering their local context, and develop insights, draw conclusions and determine implications arising from the results. The AERR reflects and summarizes this process and provides stakeholders and the public with accurate, accessible and easy to understand information about the progress and performance of the school authority in relation to their priorities and the assurance domains.

The insights and conclusions arising from the results analysis provide a basis for developing/updating the Education Plan. The Education Plan clearly identifies the priorities and outcomes the school authority wants to achieve, the measures used to assess progress, and appropriate research and practice-informed strategies that will be implemented to achieve the priorities/outcomes. As part of the planning process, school authorities consider what needs to be done to successfully implement the plan including identifying and allocating resources; identifying those responsible for leading and implementing strategies; providing professional learning; and, establishing processes to monitor progress and make adjustments.

Engaging with key stakeholders is critical in the development and implementation of the Education Plan and AERR. School authorities are expected engage students, parents, staff and community members in the planning process to establish key priorities and other elements of the plan, as appropriate. They are also required to share results and report on progress toward achieving those priorities.

School authorities use a variety of methods to communicate and engage with their stakeholders in the development of their plans and to share the results achieved in order to provide assurance to them and the public. Education Plans and AERRs are public documents that are posted on the school authority's website. These documents demonstrate how the school authority is performing in meeting its responsibilities and as such, are useful tools for providing public assurance.

Reviewing Education Plans and Annual Education Results Reports

As part of providing public assurance, Alberta Education staff monitor and support school authorities through a range of processes to ensure they are fulfilling their responsibilities and meeting expectations for performance. This includes reviewing school authorities' Education Plans and Annual Education Results Reports (AERRs) and meeting with them to review the plans/reports and to support their continuous improvement process.

Department staff review education plans and results reports for evidence that school authorities are meeting their key responsibilities; positively impacting student growth and achievement; and engaging in a robust planning and reporting cycle that reflects the guiding principles, domains and enabling processes outlined in the Assurance Framework. More specifically, key elements include:

- The school authority has collected, analyzed and evaluated key performance data arising from the implementation of its previous Education Plan and the actions taken to meet its responsibilities in each domain. It has developed insights, drawn conclusions and determined implications arising from the results.
- The insights arising from the results analysis are used to identify strengths and areas for improvement, which in turn provide a basis for establishing priorities in the Education Plan. Areas that are clearly identified as needing improvement are reflected in the priorities, outcomes, and strategies in the Education Plan.
- The school authorities have actively engaged its stakeholders (students, parents, staff, community members) in the development of the plan and it is clear how their input has informed the priorities and other components of the plan, as appropriate. It communicates and engages with stakeholders to share results and report on progress toward achieving priorities and meeting its responsibilities.
- The plan is realistic and identifies the priorities and outcomes to be achieved, measures to assess progress, and evidence-based strategies that will be implemented to address local goals and system priorities.
- The school authority develops its budget according to its priorities and key responsibilities and demonstrates effective stewardship for resources. Appropriate resources are allocated to implement and achieve the Education Plan.
- The school authority has established a system of accountability and assurance for its schools that enable continuous improvement and evidence-informed decision making. There are clear connections between the school and authority plans and the priorities in the authority plan provide strategic direction to schools.

Beyond this, reviewing the Education Plan and AERR and engaging with school authorities in professional conversation about them:

- Enhances the department's understanding and knowledge of the school authority's local context and priorities;
- Stimulates data-driven dialogue and discussion toward continuous improvement;
- Encourages school authority improvement efforts; and
- Identifies implications for provincial planning.

Education Plan

Overview

The planning component of the planning and reporting cycle for school authorities involves:

- Developing or updating Education Plans in keeping with results arising from analysis and implementation; the input gathered from stakeholder engagement activities; and, with consideration of provincial direction and system priorities.
- Ensuring that the plan contains goals/priorities with related outcomes, performance measures, and research and practice-informed strategies that address both local goals and system priorities.
- Adjusting strategies based on performance over time, the provincial and local measure results and local factors such as changes in school authorities priorities and the local context
- Developing the budget and allocating resources to support implementation of the plan/priorities and to demonstrate responsible stewardship.

School authorities use key insights arising from their results analysis and reflected in their Annual Education Results Report (AERR), along with consideration of contextual information and input from stakeholder engagement processes, to inform the key priorities, outcomes and strategies for the school authority's Education Plan. A primary purpose of the Education Plan is to identify key priorities and outcomes, and the strategies that will be implemented to improve results in those areas.

A key component in the development of the Education Plan is stakeholder engagement. School authorities are expected to engage students, parents, staff and community members in the planning process to establish key priorities and other elements of the plan, as appropriate. They are also required to share progress on achieving those priorities.

Effectively engaging stakeholders in the development of the Education Plan and sharing results has a number of benefits including ensuring school authorities are more responsive to local needs; increasing stakeholder understanding of education matters; improving decision making; and enhancing ownership for decisions. This approach to planning enables school authorities to be responsive to student and community needs and to focus on continuous improvement.

The school authority board is ultimately accountable for and approves the Education Plan. The board provides overall direction for the Education Plan and process while the administration develops a planning and budgeting process that meets school authority's needs and includes stakeholder engagement. Once this process is implemented, they prepare the content of the plan and the budget to resource the plan for approval by the board.

Education Plans must be approved by the school authority board and posted on their website by **May 31, 2020** consistent with the submission of their annual budget. School authorities must **notify the appropriate Field Services Branch Director** of the posting and include the permalink in the email notice. A permalink is a web link or URL to a web page that does not change from year to year and where the Education Plan is posted.

Requirements

School authorities have considerable flexibility to determine the form and content of their Education Plans, however, the following requirements apply:

Component	Requirements
Time Frame	<ul style="list-style-type: none"> Plans must be developed for a minimum three year time frame consistent with their strategic purpose. School authorities may opt to have a term or rolling plan. <ul style="list-style-type: none"> A term plan is established for a fixed three year or more period and remains in place until the end of the term. Rolling plans maintain a consistent timeframe and 'roll' forward with a new year added for each one completed. In either approach, school authorities must review their plans regularly and adjust them in light of their latest results from provincial and local measures and based what they are learning from the implementation of the plan. Updated plans are published annually and should reflect any adjustments made to priorities, outcomes, measures, strategies and plan implementation.
Structure	<ul style="list-style-type: none"> Plans must have outcomes, performance measures, and strategies and, should address both local goals and system priorities. <ul style="list-style-type: none"> Outcomes (short, medium, long) describe clearly the desired future and are important, realistic and measurable. Measures assess progress on achieving the outcomes and the effectiveness of the strategies. The measures selected are: <ul style="list-style-type: none"> appropriate to the identified outcomes; reflective of what would be seen in the short, medium and long term to know that progress is being made; effective for providing useful data to determine the impact of strategies and progress toward outcomes a combination of provincial (required or supplemental) and locally developed/ selected; and, technically sound. Strategies are sets of actions taken to achieve priorities and outcomes that are based on best evidence/research and professional judgement. When describing strategies and actions, school authorities must also outline their plan for implementation, particularly for the upcoming year. Charter schools are required to incorporate into their Education Plans the goals and outcomes, and measures written in their ministerial approved charter agreement.
Results Analysis	<ul style="list-style-type: none"> The most recent measure results and analysis, as reflected in the AERR, are used to support and provide a rationale for the priorities/goals, outcomes, and strategies established in the Education Plan. The connection between the priorities, outcomes, strategies and the results achieved should be clear. In short, there should be a clear connection between the AERR and the subsequent Education Plan. School authorities must: <ul style="list-style-type: none"> describe the key insights from their results analysis that are informing their Education Plan and any adjustments made;

Component	Requirements
	<ul style="list-style-type: none"> ○ review the required provincial measures and reporting requirements and incorporate them into their plan, as they deem appropriate; and, ○ outline in their plan the full set of measures (provincial and local) that will be used to assess their performance and progress toward meeting their responsibilities and reported in their AERR.
Strategic Priorities	<ul style="list-style-type: none"> • Alberta Education has identified its strategic direction in its <u>2020-2023 Business Plan</u> <ul style="list-style-type: none"> ○ School authorities should review the Business Plan and identify the strategic priorities. This will provide useful input for the development of their Education Plan and help ensure there is coherence between provincial and local priorities. • When a strategic priority requires focused action, it will be identified specifically for planning and/or incorporated into the reporting requirements. School authorities are expected to outline in their Education Plans: <ul style="list-style-type: none"> ○ The outcomes, measures and strategies that address First Nations, Métis and Inuit student success and ensure all students, teachers and school leaders learn about First Nations, Métis and Inuit perspectives and experiences, treaties, agreements, and the history and legacy of residential schools.
Stakeholder Engagement	<ul style="list-style-type: none"> • School authorities are expected to actively engage stakeholders to inform the development of local priorities and plans. The planning document should: <ul style="list-style-type: none"> ○ Clearly indicate: <ul style="list-style-type: none"> ▪ What stakeholders were involved? ▪ How they were engaged? ▪ How their input informed local priorities? ▪ What subsequent actions were taken based on the input provided? ○ Draw upon a variety of sources to measure engagement and progress on local priorities, for example using the questions from the Parental Involvement measure. ○ Indicate the school board's actions to meet its obligations under Section 12 of the <i>School Councils Regulation</i> to provide opportunity for school councils to be involved in developing school education plans.
Budget	<ul style="list-style-type: none"> • Include a web link to the board's budget for 2020/2021 that shows alignment to the Education Plan.
IMR Expenditure & Capital Plans	<ul style="list-style-type: none"> • Include a web link to the school authority's Infrastructure Maintenance & Renewal (IMR) and Capital Plans (School boards and charter schools only).
Accountability Statement	<ul style="list-style-type: none"> • Plans must contain an Accountability Statement that is signed by the board chair and placed at the beginning of the plan (see Section M for suggested Accountability Statement wording).

Annual Education Results Report (AERR) 2019 – 2020

Overview

As part of a continuous improvement cycle, school authorities are expected to assess and interpret the results arising from implementing their Education Plan and report on their progress toward achieving the priorities and outcomes in their plan in their Annual Education Results Report (AERR). In addition, school authorities must also report on their performance and the actions taken to meet their responsibilities in key assurance domains.

In preparing their AERRs, school authorities compile and assess their results pertaining to the provincial and local performance measures used in their Education Plans, as well as, the results from required provincial measures for each domain. The use of both provincial and local measures provides a more balanced and complete assessment of progress on priorities and outcomes.

School authorities analyze their data, considering their local context, and develop insights, draw conclusions and determine implications arising from the results. These results are used to report on school authority performance and to determine where improvements are needed. In addition to results from provincial measures, school authorities describe processes, programs/services, strategies, and local measures/data to demonstrate how and to what extent, they are meeting their responsibilities in each domain (See “Required Local Component” below). This also helps demonstrate that school authorities are considering and responding to their local context. Taken together, the combination of standard and context-specific information, help provide a balanced and holistic account of school authority performance.

School authorities use the key insights arising from their results analysis to identify implications for future planning. These insights, along with consideration of contextual information and input from stakeholder engagement processes inform the key priorities, outcomes and strategies for the school authority’s Education Plan.

Through the AERR, school authorities share their results, situating them in their local context, and help stakeholders understand them. The AERR should provide stakeholders with accurate, accessible and easy to understand information about the progress and performance of the school authority in relation to priorities and key domains. School authorities are expected to actively engage with stakeholders to share results and report on progress toward achieving local priorities and meeting their responsibilities.

The AERR is prepared under the direction of the school authority board using a process determined by the school authority’s accountability system and is approved by them. The report informs stakeholders about the progress the school authority is making in relation to achieving its priorities and meeting core responsibilities and is a key document for providing public assurance.

School authorities must post their approved AERR for 2019/2020 on their website in a publicly accessible format by **November 30, 2020** consistent with submission of their Audited Financial Statements. School authorities must **notify the appropriate Field Services Branch Director** by email of the posting.

Requirements

School authorities have considerable flexibility to determine the form and content of their AERR however, the following requirements apply:

- School authorities must report the results for all required provincial measures and describe the actions taken to provide assurance in each domain (see table below). They are not, however, required to organize their report according the domains.
- School authorities must report the results for performance measures identified in their Education Plan to assess their priorities and outcomes. These measures include provincial measures (required or supplemental) and locally developed/selected measures.

- For all measures:
 - Report the school authority's most recent results (including footnotes for provincial measures, where applicable).
 - Include historical or trend results/analysis, at least 3 years of data, where available.
- For all required provincial measures, include achievement and improvement evaluations, where available.
- For all measures, provide a commentary on the results to put them in context and help stakeholders understand them.
 - This can include key insights from results analysis, contextual information, factors affecting performance, or actions taken by the school authority, particularly those related to plan implementation, that may have contributed to results.
 - Implications for planning arising from the results analysis should be clearly identified.
 - While specific results for required measures are reported, the results analysis should include a thorough investigation of all results for the measure and key insights arising from that analysis should be provided in the commentary.
 - School authorities may provide more detailed measures results if available and deemed appropriate based on their analysis
- Charter schools are also required to report on the results pertaining to their charter goals and outcomes as referred to in the *Charter Schools Regulation* section 4(a) and (b).

Domain: Student Growth & Achievement

Required Provincial Measures

- **PAT Acceptable/Excellence:** The percentage of students who achieved the Acceptable Standard and the percentage of students who achieved the Standard of Excellence on Provincial Achievement Tests (based on cohort)
 - Overall and specific course results for all students
 - Overall and specific course results for self-identified First Nations, Métis and Inuit and English Second Language students
- **Diploma Exam Acceptable/Excellence:** Overall percentage of students who achieved the Acceptable Standard and the percentage of students who achieved the Standard of Excellence on Diploma Examinations.
 - Overall and specific course results for all students
 - Overall and specific course results for self-identified First Nations, Métis and Inuit and English Second Language students
- **High School Completion:** High school completion rate of students within three and five years of entering Grade 10.
 - Overall for all students and for self-identified First Nations, Métis and Inuit and English Second Language students
- **Citizenship:** Teacher, parent and student agreement that students model the characteristics of active citizenship.
 - Overall and results for teachers, parents, and students

Under Development:

- **Academic Engagement:** *A measure of student engagement in their learning at school.*

Domain: Teaching & Leading

Required Provincial Measures

- **Education Quality:** Teacher, parent and student satisfaction with the overall quality of basic education.
 - Overall and results for teachers, parents, and students.

Required Local Component
<ul style="list-style-type: none"> Processes, strategies, local measures/data to demonstrate that the school authority supports teaching and leadership quality through professional learning, supervision and evaluation processes. <ul style="list-style-type: none"> This includes demonstrating how the school authority met its responsibility, as outlined in <i>Teacher Growth, Supervision, and Evaluation Policy</i>, Section 1 (e), to provide information summarizing implementation of their local policy.
Domain: Learning Supports
Required Provincial Measures
<ul style="list-style-type: none"> Safe & Caring: Teacher, parent and student agreement that students are safe at school, learning the importance of caring for others, learning respect for others and are treated fairly at school. <ul style="list-style-type: none"> Overall and results for teachers, parents, and students. <p>Under Development:</p> <ul style="list-style-type: none"> Student Inclusion: <i>A measure assessing that students feel like they belong and are supported to be successful in their learning.</i> Access to Supports & Services: <i>A measure assessing that appropriate supports and services for students are available and can be accessed in a timely manner.</i>
Required Local Component
<ul style="list-style-type: none"> Programs, services, strategies and local measures/data used to demonstrate that the school authority is improving First Nations, Métis and Inuit student success and ensuring all students, teachers and school leaders learn about First Nations, Métis and Inuit perspectives and experiences, treaties, agreements, and the history and legacy of residential schools. Programs, services, strategies and local measures/data used to demonstrate that all students have access to a continuum of supports and services, including specialized supports and services, consistent with the principles of inclusive education.
Domain: Governance
Required Provincial Measures
<ul style="list-style-type: none"> Parental Involvement: Teacher and parent satisfaction with parental involvement in decisions about their child's education. <ul style="list-style-type: none"> Overall and results for teachers and parents Budget-Actual Comparison: School authorities (school boards & charter schools only) report the "Total Expenses" line from Schedule 12 ("Unaudited Schedule of Variance Analysis") comparing and explaining the difference in the amount budgeted for 2020/2021, the actual spent and the variance (in both amount and %).
Required Local Component
<p>Summary of Financial Results:</p> <ul style="list-style-type: none"> Processes, strategies and local measures/data to demonstrate that the school authority has effectively managed its resources including, collaboration with other school authorities, municipalities and community agencies. Include a web link to the Audited Financial Statements (AFS) and related unaudited schedules. Include a web link to the provincial roll up of AFS information: https://www.alberta.ca/k-12-education-financial-statements.aspx. Indicate where more information can be obtained (e.g. contact at central office).

Stakeholder Engagement: Processes, strategies and local measures/data to demonstrate that stakeholders were engaged to develop priorities and share progress and results. This must include:

- What stakeholders were involved?
- How were they engaged?
- How results and related information were shared?
- What progress was made towards achieving the priorities identified through the engagement process?
 - Report on results from measures of stakeholder engagement.
- How the school authority met its obligations under the *School Councils Regulation* to provide school councils the opportunity to provide advice on the development of school AERRs and to share results from provincial assessments and information from its reporting and accountability system (school boards and charter schools only).

Domain: Local & Societal Context

Local Reporting Component

- **Contextual Information:** Provide information about the school authority, students, staff and communities served (such as demographic or socio-economic data) that provide context for their Education Plan/AERR. Relevant contextual information may be also integrated into “Local Reporting Component” for specific domains.

Other Reporting Requirements

- An **Accountability Statement** signed by the board chair and placed at the beginning of the report (see Section M for suggested wording to the Accountability Statements for AERRs).
- **Whistleblower Protection:** Section 32 of the *Public Interest Disclosure Act* (2013) requires that school authorities include their annual report of disclosures in their Annual Education Results Report. For a copy of the legislation or for further information and resources, please visit the Public Interest Commissioner’s website at www.yourvoiceprotected.ca

Requirements for School Education Plans and Results Reports

Each school within the school authority must develop an education plan that reflects and aligns with the school authority’s Education Plan. Schools must also prepare a report of the school’s results for 2019/2020.

As part of its accountability system and consistent with the *School Authority Accountability Policy*, each school authority outlines its own requirements for the process, content and format for school education plans and results reports. These requirements should support continuous improvement and evidence-based decision making in schools while ensuring schools fulfill their responsibilities and provide assurance to their school communities. School authorities must outline the features of their accountability system for schools in their Education Plan and/or AERRs.

Note that Section 12 of the *School Councils Regulation* requires school boards to give school councils the opportunity to provide advice on the development of school education plans and results reports.

Alberta Education does not routinely collect or review individual school plans or results reports. It is the responsibility of school boards, as part of its accountability system, to ensure the following:

- Each school updates its education plan and prepares its results report annually;
- Each school involves the school council in updating the plan and preparing the report; and
- Each school posts its plan and report on the school’s or school authority’s website.

Section L – Forms

Funding Application Deadlines and Other Important Deadlines

FORM NO.	FUNDING APPLICATION FORM	DUE DATE	RETURN TO
20AE1	Funded Students Attending First Nations Schools	October 31, 2020	School Finance
20AE2	Ft. McMurray Allowance FTE Calculation Form	January 31, 2021	School Finance

Other Important Deadlines	Due Date
September count date	September 30, 2020
September count submission date	October 05, 2020
Course and Marks Submission or Modification (prior school year) -Term 2, 3, 4	October 16, 2020
Submission of Education Services Agreements (if applicable)	November 13, 2020
PUF Enrolment and Assessment	December 1, 2020
Adjustments/changes to Enrolment data and coding in PASI	December 18, 2020
Course and Marks Submission or Modification to SCM (School Course Marks)	
- Term 1	May 14, 2021
- Term 2, 3, 4	October 08, 2021

Funded Students Attending First Nations Schools On a Reserve 2020/21 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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Fort McMurray Allowance FTE Calculation Form 2020/21 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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Section M – Glossary of Terms

Accountability

An obligation to answer or account for assigned (delegated) responsibilities, e.g., for use of funds, results achieved and for taking action to make continuous improvement and achieve desired results. Accountability arises when one party delegates responsibility to another party. Some discretion on how responsibilities are carried out is associated with the delegation of responsibility to accountable organizations. In the public sector, accountability involves transparent public reporting of results as well as reporting to the organization, such as a government department, that delegated responsibilities and provided funding to an accountable organization. Consequences for performance are conferred by the delegating party.

Accountability Framework

A well-designed structure to ensure accountability within organizations and between governing bodies and delegated organizations (accountable parties). An accountability framework consists of measurable goals, performance measures that provide information on progress toward and achievement of outcomes, targets that indicate a desired level of performance, strategies that are implemented and adjusted as necessary to improve results over time, evaluation of results achieved, including whether improvement has taken place, public performance reports and consequences for the performance of accountable organizations.

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.

Annual Operating Deficit

In the Audited Financial Statements or the Budget Report - Statement of Revenues and Expenses - where the expenses exceed the revenues.

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 8 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 **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.

Assurance

Assurance means demonstrating to Albertans that the education system is meeting the needs of students and students are successful. Assurance arises from the combination of funding, policies, processes, actions, and evidence that help build public confidence in the education system. Assurance is achieved through relationship-building and engagement between the all education partners and by creating and sustaining a culture of continuous improvement and collective responsibility.

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.

Board

See definition of “**School board**”.

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(ren)

An individual who meets conditions 1, 2, 3, and 4 unless 5, 6, 7 or 8 apply is counted toward WMA enrolment for the purposes of allocating funding:

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. Children must meet the minimum age requirements for each grant in order for an ECS operator to receive the corresponding maximum number of years of funding for each child included in the WMA enrolment calculation for that grant. See the table below:

Category of ECS Children	Type of ECS Funding Provided	Minimum age of the child on September 1	Maximum age of the child on September 1
Kindergarten child	Base Instruction Funding (Maximum of 1 year funding)	4 years 8 months	Less than 6 years
ECS child with a mild/moderate disability/delay,	Base Instruction Funding (all school authorities) and Mild/Moderate (Private and ECS Operators only) (Maximum 2 years funding which includes the Kindergarten year)	3 years 8 months	Less than 6 years
ECS child who is gifted and talented	Base Instruction Funding (all school authorities) and Gifted and Talented (Private and ECS Operators only) (Maximum 2 years funding which includes the Kindergarten year)	3 years 8 months	Less than 6 years
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) and ESL/ Francisation Funding	3 years 8 months	Less than 6 years
ECS child with severe disabilities/delay	Base Instruction Funding (Maximum 3 years funding which includes the Kindergarten year) and PUF (Max years see Section C2.7, D2.4, E2.2)	2 years 8 months	Less than 6 years (4 years 8 months for Public authorities)
ECS child who is developmentally immature	Base Instruction Funding (Maximum 2 years funding)	5 years 8 months	Less than 7 years

*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 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.
4. Is a resident of Alberta and has a **parent** who ordinarily resides in Alberta on the **September count date**;
 5. For funding purposes, a **First Nations child who resides on a reserve** is not counted toward WMA enrolment.
 6. An individual who is **developmentally immature** (code 10).
 7. An individual who is at least 5 years 8 months but less than 7 years of age on September 1, and who is either coded severe or mild/moderate, gifted/talented, or ESL/Francisation, may be counted toward WMA enrolment 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 toward WMA enrolment 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.

Child with a Mild/Moderate Disability/Delay

A **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 or Severe Language Delay

A **child** who is assessed and identified as having a severe disability or severe language delay as defined in the *Special Education Coding Criteria*.

Child who is Gifted/Talented

A **child** who is gifted and talented as defined in the *Special Education Coding Criteria*.

Credits Completed

The credit value of a course submitted as complete (COM) or withdrawn (WDR) is considered completed when:

1. a **student** has earned a final mark of 50 per cent or greater in the course; or
2. a **student** has earned a final mark of 25 per cent or greater but less than 50 per cent in the course, and has worked on and been assessed on at least 50 per cent of the course content. When a **student** changes from one course to another within an academic program in the same term (e.g. **student** switches from Social Studies 10-1 to Social Studies 10-2), school authorities shall only claim one course for completion.

Department of Education

As per the Government Organization Act, the department of government administered by the Minister of Education. The Department of Education, school authorities, and the Alberta School Foundation constitute the Ministry of Education as per the Fiscal Planning and Transparency Act.

Domain

A domain is an area of activity where school authorities have specific responsibilities for which they are accountable and provide assurance.

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	- 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 **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 a mild, moderate or severe disabilities code.

Distance Education Program

A print-based or electronic education program offered by a school authority and delivered 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.

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 by Alberta Education in which grade 10, 11, or 12 **students** can earn both high school credits and credits that count toward a post-secondary certificate, diploma, or degree, including a journeyperson certificate.

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.

Education Programs in Institutions

A residence operated or approved by the government and prescribed by the Minister of Education as an institution.

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*.

Evidence-Informed

Refers to the practices and processes associated with collecting and interpreting information to provide insight into performance, to summarize performance for information purposes and for informing appropriate decisions.

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/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

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.

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*.

FTE

Full-time Equivalent.

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.

Home Education Student

A **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 8 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.

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.

Independent Student

A **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 **child/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**.

School Authorities Approved to Provide an Education Program in an Institution (EPI), in alignment with the <i>Education Act</i>	
School Authority	Schools
The Aspen View School Division	- Night Wind, Kihew House School (1920)
The Calgary School Division (3030)	- West View School (9687) - ExCel Discovery Program (9687) - Youth Attendance Centre (9687) - William Roper Hull School (9033)

School Authorities Approved to Provide an Education Program in an Institution (EPI), in alignment with the <i>Education Act</i>	
The Chinook's Edge School Division (0053)	- Equinox Group Home (1453)
The Edmonton School Division (3020)	- Institutional Service Schools (7706) - Attendance Centre (7706) - Howard House School (7706) - Kennedale School (7706) - Yellowhead School (7706)
The Holy Family Catholic Separate School Division (0021)	- St. Francis Holistic Learning Centre (1619)
The Lethbridge School Division (3040)	- Pitawani School (6456)
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) - Youth Assessment Centre (4457)
The Sturgeon School Division (1110)	- Oak Hill School (2509)

Institutional Students

Resident students of the government who attend an **education program in an institution (EPI)**.

Key Element

A specific, measureable and achievable outcome that, if demonstrated consistently, will provide assurance for each domain.

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).

Minister

Refers to the **Minister** of Education.

Non-Primary Registration

Any registration not meeting the definition of Primary Registration is considered Non-Primary Registration (see Primary Registration below).

Outcomes

Measurable statements of what an organization seeks to achieve. In broad terms, they answer the question, “What will this look like when we get to where we want to be?”

Outreach Program

A program offered by a **school** which provides a basic education for **students** who are unable to attend or benefit from a regular school program. More information regarding outreach programs are detailed in the *Outreach Program Handbook*.

Parent

With respect to a **student**, the relevant individual under section 1(r) and 2 of the *Education Act* unless otherwise specified.

Performance Measures

Performance measures provide information on important, quantifiable aspects of the education system. They enable school authorities to assess progress toward achieving goals and outcomes.

Primary Registration

The registration for which the student is counted for the purposes of the WMA enrolment. The methodology for determining the primary registration is outlined under H3. The count is finalized using the Funding Event System (FES) on December 18, of the respective school year.

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 **child/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 **children/students** will require significant additional supports and services, including English language and/or Francisation learning supports, 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 approval. For funding purposes, this documentation must include the date of entering Canada as a refugee or the date accepted as a refugee.

To receive 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.

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.

School

A structured education environment through which an education program is offered to a **child/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**.

School Authorities

For purposes of this manual includes **school jurisdictions**, **accredited funded private schools**, and **private ECS operators**, unless otherwise specified.

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 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.

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*.

Schools of Choice

Refers to schools that parents/guardians/students choose other than the student's designated school within a school authority because of the type of program being offered.

September Count Date

This is the specified date that **school authorities** must take an enrolment count of all their children/**students** for the calculation of WMA enrolment. 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.

Specialized Education Programs

Specialized Education Programs are for students who temporarily attend education programs include education programs in emergency women's shelters, hospitals and facilities that are not licensed by Children's Services as residential facilities. Students in Specialized Education Programs are not considered to be resident students of the government.

School Authorities Approved to Provide Other Specialized Education Program	
School Authority	Schools
The Battle River School Division	- Camrose Women's Shelter (4554)
The Calgary School Division (3030)	- Adolescent Day Treatment Program (1749) - Dr. Gordon Townsend School (9886) - Women's Emergency Shelter (no code) - Young Adult Program (9512)
The Edmonton Catholic Separate School Division (0110)	- Alberta Health Services Intensive Day Treatment Youth Program (1576) - Alberta Health Services Youth Residential Treatment Centre
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) - Highwood School (7706) - Rite Trak School (7706)
The Elk Island School Division (2195)	- A Safe Place (3343) - Elk Island Youth Ranch Learning Centre (1599)
The Lakeland Roman Catholic Separate School Division (4105)	- Dr. Margaret Savage Centre School (2916)
The Lethbridge School Division (3040)	- Harbour House School (6459) - Child and Adolescent Mental Health Program (CAMP) (6453) - Stafford Ridge School (1380)
The Medicine Hat School Division	- PAS (6864)
The Red Deer School Division (3070)	- Willow Mental Health Treatment Centre (4464) - Red Deer Regional Hospital Education Program (0574)
The St. Paul School Division (2185)	- Columbus House of Hope (1741)
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	- Wolf Creek Education Centre (4299)

Strategies

Strategies are actions that school authorities take to achieve goals and desired outcomes that meet the needs of all their **students**. Strategies may address local circumstances, issues, trends, and opportunities.

Student(s)

An individual who meets conditions 1, 2, 3, and 4, unless 5 or 6 applies, is counted toward WMA enrolment for the purposes of allocating funding:

1. Is attending a school 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 8 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 8 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.

Note: Any student who is less than 5 years 8 months and has attended Kindergarten in the 2019/20 school year, will be counted as a student in the next school year, due to change in the age requirements, effective from 2020/21 school year.
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 toward WMA enrolment.

6. For funding purposes, a **home education student** is not counted toward WMA enrolment.

Student who is Gifted/Talented

A **student** who is gifted and talented, as defined in the *Special Education Coding Criteria*.

Student with a Mild/Moderate Disability

A **student** who has been assessed and identified as having a mild/moderate disability as defined in the *Special Education Coding Criteria*.

Student with a Severe Disability or Severe Language Delay

A **student** or **child** who has been assessed and identified as having a severe disability or severe language delay as defined in the *Special Education Coding Criteria*.

System Administration

System Administration expense definitions have been developed on a principle based approach intended to increase transparency of costs and greater consistency between jurisdictions.

Recognizing the intricacies and inter-relationships of the functions within a school jurisdiction has resulted in the need to develop a pro-rata based model, which recognizes allocations may be required to reflect this fact. Guidelines and allocations are designed to support jurisdiction decision making and actions that support student learning.

Board Governance

- Board Governance includes all activities related to the work and operation of the elected board of trustees. This includes all directly related support, including staff, for trustees. Board governance is composed of all payments to trustees in any form (salaries, wages, benefits, per diems, honorariums, allowances and any other form of compensation) and expenses incurred by the board for such things as travel, professional development, board sponsored functions, conference attendance, membership fees and school board elections.

All Other Central Office Functions

- Costs for these services should be allocated based on the benefit relative to the function that they serve. This allocation may use a reasonable allocation basis, (e.g. an FTE basis) if so desired but must be applied consistently year over year.
- Administration buildings cost that are shared facilities should be allocated to the respective programs based on square footage.

Teacher-Directed Instruction

- An Alberta certificated teacher takes the lead role in the program planning process and takes responsibility for ensuring each child receives instruction, services and supports in order to meet the IPP goals.
- Teacher-directed instruction does not mean the individual is in a classroom and delivering instruction to a child or group of children for either 400 or 800 hours per school year. Rather teacher-directed instruction must be scheduled in a manner that is flexible enough to accommodate daily, weekly and monthly adjustments that best support a child and/or group of children's learning.
- This teacher-directed instruction can take place in a variety of settings like classrooms, playschools, preschools and daycares, and up to 35 hours can be used for activities such as visits to the child's home and demonstration of skills and strategies to parents and/or caregivers.

- Teacher-directed instruction may include:
 - IPP development, lesson planning, assessment of child's learning, reporting progress to parents, liaison and coordination of IPP activities with playschool, preschool etc. staff, transition planning for following school year, individual sessions with parents and their child, coordination of direct and/or consultative services from therapists in support of the child's IPP goals, etc.
 - Other instructional activities may include visits to the child's home to coach parents and caregivers on specific skill/strategies, or, demonstration of child learning in child-parent-teacher conferences.

Other Professionals:

- Examples of other professionals are Speech Language Pathologist, Occupational Therapist, Physical Therapy, Psychologist, Behaviour Specialist etc.
- Roles/activities of other professionals may include:
 - Participating in IPP meetings with family and teacher(s), parent consultation and strategy demonstrations, direct services to child and/or teacher, teacher consultation on programming goals, activities, conducting formal and informal assessment of progress, location or classroom observations, record keeping, contributing to reports for parents (e.g. monthly progress reports, report cards etc.)

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 **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 **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 **child/student** are considered Foreign Students and do not qualify for inclusion in WMA enrolment calculations.

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.

Trend

A trend shows a direction of data overtime (e.g., enrolment growth).

Unorganized Territory

Any area in Alberta that is not included within a district, a **division**, or a regional **division**.

WMA FTE Enrolment

For the purposes of calculating WMA enrolment:

- A Grade **ECS student** counts as 0.5 **FTE**.
- A Grade 1-12 **student** counts as 1.0 **FTE**.

Section N – Accountability Statements for Education Plans and Annual Education Results Reports (AERRs)

Accountability Statements are required for Education Plans and AERRs. Recommended wording is provided below.

Accountability Statement for the Education Plan

The Education Plan for (*name of school authority*) commencing (*date*) was prepared under the direction of the Board/Board of Directors in accordance with the responsibilities under the *Education Act* and the *Fiscal Planning and Transparency Act*. This plan was developed in the context of the provincial government's business and fiscal plans. The Board has used its performance results to develop the plan and is committed to implementing the strategies contained within the plan to improve student learning and results.

The Board approved the Education Plan for (*timeframe in years*) on (*month and day*), 2020.

Accountability Statement for the Annual Education Results Report

The Annual Education Results Report for (*name of school authority*) for the 2019/2020 school year was prepared under the direction of the Board/Board of directors in accordance with the responsibilities under the *Education Act* and the *Fiscal Planning and Transparency Act*. The Board is committed to using the results in this report, to the best of its abilities, to improve outcomes for students and to ensure that all students in the school authority can acquire the knowledge, skills and attitudes they need to be successful and contributing members of society.

This Annual Education Results Report for 2019/2020 was approved by the Board on (*month and day*), 2020.

Section O – Grant Indices

O1.1 - Socioeconomic Status Index

School Jurisdiction	SES Index
Almadina School Society	6.8144
Aurora School Ltd.	1.4452
Boyle Street Education Centre	9.4906
Calgary Arts Academy Society	1.0417
Calgary Girls' School Society	1.0064
CAPE - Centre for Academic and Personal Excellence Institute	4.6455
Connect Charter School Society	1.0001
Foundations for the Future Charter Academy Charter School Society	1.1034
Lloydminster Public School Division	1.9048
Lloydminster Roman Catholic Separate School Division	1.4502
Mother Earth's Children's Charter School Society	2.0255
New Horizons Charter School Society	1.0145
Suzuki Charter School Society	1.3165
The Aspen View School Division	9.4345
The Battle River School Division	4.5206
The Black Gold School Division	2.0000
The Buffalo Trail School Division	4.1787
The Calgary Roman Catholic Separate School Division	1.2685
The Calgary School Division	1.2167
The Canadian Rockies School Division	5.4186
The Chinook's Edge School Division	3.3835
The Christ the Redeemer Catholic Separate School Division	2.0659
The Clearview School Division	6.3193
The East Central Alberta Catholic Separate School Division	5.1113
The East Central Francophone Education Region	5.7284
The Edmonton Catholic Separate School Division	3.1506
The Edmonton School Division	2.5901
The Elk Island Catholic Separate School Division	1.1885
The Elk Island School Division	1.1486
The Evergreen Catholic Separate School Division	2.4191

School Jurisdiction	SES Index
The Foothills School Division	1.4827
The Fort McMurray Roman Catholic Separate School Division	1.0700
The Fort McMurray School Division	1.0833
The Fort Vermilion School Division	4.7951
The Golden Hills School Division	5.2148
The Grande Prairie Roman Catholic Separate School Division	3.7468
The Grande Prairie School Division	4.6428
The Grande Yellowhead School Division	4.0801
The Grasslands School Division	7.9120
The Greater North Central Francophone Education Region	2.9478
The Greater St. Albert Roman Catholic Separate School Division	1.0801
The High Prairie School Division	7.5776
The Holy Family Catholic Separate School Division	6.9406
The Holy Spirit Roman Catholic Separate School Division	3.6382
The Horizon School Division	7.4639
The Lakeland Roman Catholic Separate School Division	4.5244
The Lethbridge School Division	3.4758
The Living Waters Catholic Separate School Division	8.3435
The Livingstone Range School Division	7.3953
The Medicine Hat Roman Catholic Separate School Division	3.4054
The Medicine Hat School Division	5.4130
The Northern Gateway School Division	7.8770
The Northern Lights School Division	6.8636
The Northland School Division ⁴	9.7003
The Northwest Francophone Education Region	4.5790
The Palliser School Division	2.0498
The Parkland School Division	2.1905
The Peace River School Division	5.7740
The Peace Wapiti School Division	5.6177
The Pembina Hills School Division	4.2375
The Prairie Land School Division	7.4529
The Prairie Rose School Division	5.9351
The Red Deer Catholic Separate School Division	3.2346

⁴ The Northland School Division is provided a supplemental allocation to address the unique socioeconomic context of the school division.

School Jurisdiction	SES Index
The Red Deer School Division	4.4926
The Rocky View School Division	1.0683
The Southern Francophone Education Region	1.3567
The St. Albert School Division	1.0618
The St. Paul School Division	7.9461
The St. Thomas Aquinas Roman Catholic Separate School Division	4.1389
The Sturgeon School Division	2.4042
The Westwind School Division	2.3279
The Wetaskiwin School Division	9.2352
The Wild Rose School Division	4.6970
The Wolf Creek School Division	5.7845
Valhalla School Foundation	8.2027
Westmount Charter School Society	1.0004

O1.2 - Geographic Indices

School Jurisdiction	Rurality Index	Northern Location Index	Sparsity-Area-Distance Index	Area Index
The Greater North Central Francophone Education Region	0.0312	0.3758	2.7055	1.0000
The Peace River School Division	4.8348	10.0000	3.6389	1.0000
The Peace Wapiti School Division	3.3652	5.0691	1.9102	1.0000
The East Central Francophone Education Region	4.5656	0.0000	5.2388	0.4626
The Christ the Redeemer Catholic Separate School Division	3.5011	0.0000	0.1201	0.9452
The Grande Yellowhead School Division	4.4001	0.0000	0.9995	0.7486
The East Central Alberta Catholic Separate School Division	3.8514	0.0000	0.7027	0.4453
The Sturgeon School Division	4.8097	0.0000	0.0355	0.2680
The High Prairie School Division	4.5263	5.0000	2.2827	0.7566
The Grande Prairie School Division	0.0000	5.0000	0.8167	0.0000
The Wolf Creek School Division	4.0779	0.0000	0.1607	0.7420
The Northern Lights School Division	4.6500	0.0198	1.0667	0.9537
The Elk Island School Division	0.7182	0.0000	0.0081	0.5446
The Northwest Francophone Education Region	1.2208	6.1235	7.6818	0.6480

School Jurisdiction	Rurality Index	Northern Location Index	Sparsity-Area-Distance Index	Area Index
The Canadian Rockies School Division	3.5130	0.0000	0.3079	0.1600
The Parkland School Division	0.6993	0.0000	0.0197	0.3037
The Grasslands School Division	4.2433	0.0000	0.6508	0.6489
The Golden Hills School Division	5.2088	0.0000	0.1801	0.9537
The Medicine Hat Roman Catholic Separate School Division	0.0000	0.0000	0.3662	0.0455
The Elk Island Catholic Separate School Division	0.3976	0.0000	0.0118	0.2697
The Grande Prairie Roman Catholic Separate School Division	0.1244	5.0000	1.2391	0.8078
Mother Earth's Children's Charter School Society	10.0000	0.0000	0.0536	0.0000
The Calgary Roman Catholic Separate School Division	0.0196	0.0000	0.0000	0.0000
The St. Thomas Aquinas Roman Catholic Separate School Division	2.9674	0.0000	0.0674	0.3737
The Edmonton Catholic Separate School Division	0.0000	0.0000	0.0000	0.0000
The Edmonton School Division	0.0000	0.0000	0.0000	0.0000
The Calgary School Division	0.0000	0.0000	0.0000	0.0000
The St. Albert School Division	0.0000	0.0000	0.0000	0.0000
Westmount Charter School Society	0.0000	0.0000	0.0000	0.0000
Calgary Girls' School Society	0.0000	0.0000	0.0000	0.0000
Almadina School Society	0.0000	0.0000	0.0000	0.0000
New Horizons Charter School Society	0.0000	0.0000	0.0000	0.0000
Connect Charter School Society	0.0000	0.0000	0.0000	0.0000
Suzuki Charter School Society	0.0000	0.0000	0.0000	0.0000
Boyle Street Education Centre	0.0000	0.0000	0.0000	0.0000
Aurora School Ltd.	0.0000	0.0000	0.0000	0.0000
Foundations for the Future Charter Academy Charter School Society	0.0000	0.0000	0.0000	0.0000
Calgary Arts Academy Society	0.0000	0.0000	0.0000	0.0000
CAPE - Centre for Academic and Personal Excellence Institute	0.0000	0.0000	0.3399	0.0000
The Greater St. Albert Roman Catholic Separate School Division	0.2734	0.0000	0.0009	0.0567
The Living Waters Catholic Separate School Division	3.5000	0.5844	0.7216	0.2526
Lloydminster Roman Catholic Separate School Division	0.0000	0.0000	0.2407	0.0000
The Rocky View School Division	0.6681	0.0000	0.0153	0.5176
The Westwind School Division	3.9069	0.0000	0.5018	0.4894
Lloydminster Public School Division	0.0000	0.0000	0.2444	0.0000
The Red Deer School Division	0.0000	0.0000	0.0857	0.0000
The Prairie Land School Division	7.0957	0.0000	4.2749	1.0000

School Jurisdiction	Rurality Index	Northern Location Index	Sparsity-Area-Distance Index	Area Index
The Holy Spirit Roman Catholic Separate School Division	0.2176	0.0000	0.3360	0.5954
The Lethbridge School Division	0.0000	0.0000	0.1850	0.0000
The Evergreen Catholic Separate School Division	0.5123	0.0000	0.0622	0.3020
Valhalla School Foundation	10.0000	5.0000	1.2382	0.0000
The Medicine Hat School Division	0.0000	0.0000	0.3406	0.0000
The Red Deer Catholic Separate School Division	0.2882	0.0000	0.1588	0.5750
The Southern Francophone Education Region	0.0791	0.0000	1.3119	0.6489
The Aspen View School Division	6.4363	0.1482	1.0142	1.0000
The Pembina Hills School Division	5.1382	0.0000	0.3707	0.8837
The Horizon School Division	5.1084	0.0000	0.9423	0.9546
The St. Paul School Division	4.4300	0.0000	0.8175	0.6766
The Palliser School Division	0.8205	0.0000	0.3350	0.8206
The Clearview School Division	6.0921	0.0000	0.9280	0.8246
The Livingstone Range School Division	4.2606	0.0000	0.6670	0.9140
The Battle River School Division	5.7483	0.0000	0.3869	1.0000
The Northland School Division	8.9693	5.4235	8.7525	0.4877
The Buffalo Trail School Division	6.9020	0.0000	0.9961	1.0000
The Foothills School Division	4.1329	0.0000	0.0800	0.3993
The Chinook's Edge School Division	4.2651	0.0000	0.1663	0.9077
The Wild Rose School Division	5.0986	0.0000	0.6790	0.7463
The Northern Gateway School Division	5.5847	0.6053	0.7204	0.9617
The Wetaskiwin School Division	5.2666	0.0000	0.1806	0.3743
The Fort McMurray Roman Catholic Separate School Division	0.0000	10.0000	0.7559	0.0468
The Fort McMurray School Division	0.0000	10.0000	0.7550	0.0372
The Lakeland Roman Catholic Separate School Division	3.7348	0.0000	1.4349	0.9597
The Fort Vermilion School Division	7.7295	10.0000	3.7039	0.6480
The Holy Family Catholic Separate School Division	3.6845	8.1296	3.3345	0.8321
The Black Gold School Division	3.3828	0.0000	0.0246	0.2063
The Prairie Rose School Division	7.2346	0.0000	2.8074	1.0000

O1.3 - School Nutrition

For the School Nutrition Grant, the SES categories for the school jurisdictions are listed in the table below.

SES Category	School Jurisdiction
Category 5	The Northland School Division
	The Aspen View School Division
	The Wetaskiwin School Division
	The Living Waters Catholic Separate School Division
	The St. Paul School Division
	The Grasslands School Division
	The Northern Gateway School Division
	The High Prairie School Division
	The Horizon School Division
	The Prairie Land School Division
	The Livingstone Range School Division
	The Holy Family Catholic Separate School Division
	The Northern Lights School Division
Category 4	The Clearview School Division
	The Prairie Rose School Division
	The Wolf Creek School Division
	The Peace River School Division
	The East Central Francophone Education Region
	The Peace Wapiti School Division
	The Canadian Rockies School Division
	The Medicine Hat School Division
	The Golden Hills School Division
	The East Central Alberta Catholic Separate School Division
	The Fort Vermilion School Division
Category 3	The Wild Rose School Division
	The Grande Prairie School Division
	The Northwest Francophone Education Region
	The Lakeland Roman Catholic Separate School Division
	The Battle River School Division
	The Red Deer School Division
	The Pembina Hills School Division
	The Buffalo Trail School Division
	The St. Thomas Aquinas Roman Catholic Separate School Division
	The Grande Yellowhead School Division
	The Grande Prairie Roman Catholic Separate School Division
	The Holy Spirit Roman Catholic Separate School Division
	The Lethbridge School Division
	The Medicine Hat Roman Catholic Separate School Division
	The Chinook's Edge School Division
	The Red Deer Catholic Separate School Division
Category 2	The Edmonton Catholic Separate School Division
	The Greater North Central Francophone Education Region
	The Edmonton School Division
	The Evergreen Catholic Separate School Division
	The Sturgeon School Division
	The Westwind School Division

SES Category	School Jurisdiction
	The Parkland School Division
	The Christ the Redeemer Catholic Separate School Division
	The Palliser School Division
	The Black Gold School Division
Category 1	Lloydminster Public School Division
	The Foothills School Division
	Lloydminster Roman Catholic Separate School Division
	The Southern Francophone Education Region
	The Calgary Roman Catholic Separate School Division
	The Calgary School Division
	The Elk Island Catholic Separate School Division
	The Elk Island School Division
	The Fort McMurray School Division
	The Greater St. Albert Roman Catholic Separate School Division
	The Fort McMurray Roman Catholic Separate School Division
	The Rocky View School Division
	The St. Albert School Division

O1.4 - First Nation, Inuit and Metis Grant

The frequencies of self-identification in the school authority and Aboriginal self-reporting through the Census in the community used in the School and Community Demographic component are shown below:

School Jurisdiction	School	Community
Almadina School Society	0.0000%	0.0000%
Aurora School Ltd.	0.1325%	0.0000%
Boyle Street Education Centre	90.2159%	0.0000%
Calgary Arts Academy Society	3.1313%	0.0000%
Calgary Girls' School Society	2.5398%	0.0000%
CAPE - Centre for Academic and Personal Excellence Institute	0.9699%	0.0000%
Connect Charter School Society	0.0000%	0.0000%
Foundations for the Future Charter Academy Charter School Society	0.0000%	0.0000%
Lloydminster Public School Division	10.0502%	13.1407%
Lloydminster Roman Catholic Separate School Division	7.5116%	12.4674%
Mother Earth's Children's Charter School Society	59.1837%	0.0000%
New Horizons Charter School Society	2.6100%	0.0000%
Suzuki Charter School Society	8.1273%	0.0000%
The Aspen View School Division	20.2280%	21.1011%
The Battle River School Division	4.7414%	6.1929%
The Black Gold School Division	7.5976%	7.4527%

School Jurisdiction	School	Community
The Buffalo Trail School Division	6.8652%	7.7569%
The Calgary Roman Catholic Separate School Division	2.4352%	3.9134%
The Calgary School Division	4.2254%	3.6854%
The Canadian Rockies School Division	2.6169%	13.4866%
The Chinook's Edge School Division	8.1237%	7.5671%
The Christ the Redeemer Catholic Separate School Division	2.6317%	5.7957%
The Clearview School Division	8.3101%	8.4520%
The East Central Alberta Catholic Separate School Division	5.5251%	8.2174%
The East Central Francophone Education Region	5.1568%	17.2097%
The Edmonton Catholic Separate School Division	8.1933%	7.1578%
The Edmonton School Division	9.2052%	6.9119%
The Elk Island Catholic Separate School Division	5.0314%	6.8192%
The Elk Island School Division	6.3537%	6.4613%
The Evergreen Catholic Separate School Division	8.2611%	10.7396%
The Foothills School Division	2.8578%	5.8261%
The Fort McMurray Roman Catholic Separate School Division	14.4718%	11.3561%
The Fort McMurray School Division	9.7598%	9.9850%
The Fort Vermilion School Division	22.1918%	17.0407%
The Golden Hills School Division	5.1014%	7.9436%
The Grande Prairie Roman Catholic Separate School Division	11.8648%	12.9665%
The Grande Prairie School Division	16.4977%	13.5732%
The Grande Yellowhead School Division	14.8861%	14.7276%
The Grasslands School Division	2.2922%	7.0383%
The Greater North Central Francophone Education Region	1.1518%	8.1057%
The Greater St. Albert Roman Catholic Separate School Division	6.4668%	7.4430%
The High Prairie School Division	35.9961%	39.1063%
The Holy Family Catholic Separate School Division	30.9905%	38.4449%
The Holy Spirit Roman Catholic Separate School Division	10.7457%	8.8393%
The Horizon School Division	3.1526%	2.5815%
The Lakeland Roman Catholic Separate School Division	14.8525%	17.5305%
The Lethbridge School Division	6.5781%	8.3229%
The Living Waters Catholic Separate School Division	12.1545%	22.5288%
The Livingstone Range School Division	6.1720%	13.9030%
The Medicine Hat Roman Catholic Separate School Division	3.4182%	6.6162%
The Medicine Hat School Division	5.2042%	7.4809%

School Jurisdiction	School	Community
The Northern Gateway School Division	17.7617%	23.2768%
The Northern Lights School Division	27.4040%	21.8910%
The Northland School Division	62.0827%	75.6008%
The Northwest Francophone Education Region	4.8890%	12.0872%
The Palliser School Division	1.3919%	7.7410%
The Parkland School Division	7.5586%	10.7483%
The Peace River School Division	26.7577%	19.9674%
The Peace Wapiti School Division	11.3081%	11.6391%
The Pembina Hills School Division	8.8402%	8.1246%
The Prairie Land School Division	3.0734%	1.3340%
The Prairie Rose School Division	2.3807%	3.1510%
The Red Deer Catholic Separate School Division	7.3265%	8.0081%
The Red Deer School Division	8.9321%	7.8347%
The Rocky View School Division	3.2503%	5.6972%
The Southern Francophone Education Region	1.0389%	4.7269%
The St. Albert School Division	4.0622%	6.0926%
The St. Paul School Division	15.3698%	19.5419%
The St. Thomas Aquinas Roman Catholic Separate School Division	7.8318%	11.5182%
The Sturgeon School Division	12.2793%	12.9444%
The Westwind School Division	7.7612%	13.7653%
The Wetaskiwin School Division	17.1987%	23.4874%
The Wild Rose School Division	8.9415%	8.5553%
The Wolf Creek School Division	7.9774%	11.7111%
Valhalla School Foundation	2.3135%	0.0000%
Westmount Charter School Society	0.0774%	0.0000%