Interim 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
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);
- *Education Grants Regulation* (AR120/2008), Sections 2 and 7; and,
- *Private Schools Regulation* (93/2019), Sections 16 and 19.
February 28, 2020

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 Model 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:

1. **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 commitments 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 and department staff will work diligently with you to resolve any issues prior to the start of the school year. Department staff will also use these conversations to help determine if any final adjustments are needed. 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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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 K-12 students recognizes that every 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 students within an inclusive learning environment.
- This grant is made up three allocations:
  - Multi-Disciplinary Team: 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.
  - Mental Health Program: to support capacity in school authorities to offer mental health programming to improve educational outcomes of all students.
- The SLS Support Grant includes funding for kindergarten students with severe disabilities and delays.

Program Unit Funding (PUF)

- PUF will continue to be allocated to support pre-Kindergarten (pre-K) children with severe disabilities and delays.
- 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.
  - Private operators will continue to receive PUF funding for three years.
- The new funding model establishes two tiers of funding based on hours of instruction for pre-K students 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.
- Schools are not required to conduct assessments annually. Once a student is assessed as requiring additional language support and included in the WMA enrolment for this grant, 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.
- Schools are not required to submit documentation annually. Once a student is identified as a refugee and included in the WMA enrolment for this grant, 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 (OM) Grant is targeted funding to ensure safe and well-maintained schools for students.
- The OM 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 OM from other grants, but school authorities may not reallocate targeted OM 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

Structure and Purpose of Alberta’s K-12 Education System

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 document, school authorities are school boards, charter schools and accredited funded private school operators.

The priority of the K-12 education system is the success of every child in school. Each type of school authority assures the quality of education for its students while the Department of Education\(^1\) assures the quality of education provided by school authorities.

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

In Alberta’s K-12 education system, the provincial government delegates responsibility to school authorities. This delegation comes with an 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 requirement facilitates the transparency of the accountable organization.

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 school authorities. This accountability relationship is established in legislation and regulation.

School authorities are also responsible for providing assurance to the Department, 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.

\(^1\) See Section L: Glossary
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. 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.

Pursuant to the Government Organization Act and the Education Act, and to operationalize the accountability relationships and processes established in provincial legislation, this manual contains the Minister’s requirements for school authorities’ Education Plans and Annual Education Results Reports (AERRs).

The Minister’s requirements in this document ensure that school authority Education Plans and AERRs are consistent with Education’s vision, mission and key system priorities. In this way, the department, school authority and school documents help ensure that the K–12 education system is focused effectively and efficiently on meeting the educational needs of Alberta students.
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;

\(^2\) International Association of Public Participation (IAP2)
• 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.

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.
Each of the five domains is defined 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 improvement 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? What next?

**Key Enabling Processes for Continuous Improvement**

Key enabling processes that must be part of all phases of continuous improvement cycles 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.

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.

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. 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 and engagement with education partners and by creating and sustaining a culture of continuous improvement and collective responsibility.

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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:

<table>
<thead>
<tr>
<th>School Year</th>
<th>Weighted Factor</th>
<th>Enrolment Count (FTE)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018/19</td>
<td>20%</td>
<td>Actual</td>
</tr>
<tr>
<td>2019/20</td>
<td>30%</td>
<td>Estimates</td>
</tr>
<tr>
<td>2020/21</td>
<td>50%</td>
<td>Projection</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>School Year</th>
<th>Weighted Factor</th>
<th>Enrolment Count (FTE)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018/19</td>
<td>20%</td>
<td>16,480</td>
</tr>
<tr>
<td>2019/20</td>
<td>30%</td>
<td>16,700</td>
</tr>
<tr>
<td>2020/21</td>
<td>50%</td>
<td>16,850</td>
</tr>
</tbody>
</table>

WMA Enrolment (FTE) = (16,480*20% + 16,700*30% + 16,850*50%) = 16,731

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

<table>
<thead>
<tr>
<th>School Year</th>
<th>Weighted Factor</th>
<th>Enrolment Count (FTE)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018/19</td>
<td>20%</td>
<td>5,460</td>
</tr>
<tr>
<td>2019/20</td>
<td>30%</td>
<td>5,400</td>
</tr>
<tr>
<td>2020/21</td>
<td>50%</td>
<td>5,350</td>
</tr>
</tbody>
</table>

WMA Enrolment (FTE) = (5,460*20% + 5,400*30% + 5,350*50%) = 5,387

The projected enrolment count will be determined based 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 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

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual count</td>
<td>16480</td>
<td>16700</td>
<td>16800</td>
<td></td>
</tr>
<tr>
<td>Projected count</td>
<td></td>
<td></td>
<td>16850</td>
<td>16876</td>
</tr>
<tr>
<td>WMA for 2020-2021 funding calculations (calculated in Feb 2020 using 2020-2021 projected count)</td>
<td>20%*16480 + 30%*16700 + 50%*16850 = 16731</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>WMA verification for 2020-2021 (calculated in Dec 2020 using 2020-2021 actual count)</td>
<td>20%*16480 + 30%*16700 + 50%*16800 = 16706</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>WMA adjustment</td>
<td></td>
<td></td>
<td>16731 – 16706 = <strong>25</strong></td>
<td></td>
</tr>
<tr>
<td>WMA for 2021-2022 (calculated in Feb 2021)</td>
<td>(20%*16700 + 30%*16800 + 50%*16876) – 25 = <strong>16793</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

C1.2 – ECS-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. All children/students who are at least 4 years, 8 months of age, but less than 20 years of age on September 1 will be counted toward the WMA enrolment calculation for this grant. Please see the Glossary for the criteria for determining which individuals are counted as “children” or “students” for the purposes of funding.
   a. Students more than 2 years, eight months and less than 4 years eight months will be counted toward the WMA enrolment calculation if they are identified as having a severe disability or severe language delay.
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 were placed in the ECS program will be counted toward the WMA enrolment calculation.
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. Base instruction funding for Grade 1-9 is based on Grades 1-9 WMA enrolment of the school jurisdiction.

5. ECS-Grade 12 students enrolled in schools that are eligible for the Rural Small Schools Grant are excluded from the WMA enrolment calculation for base instruction funding.

6. School jurisdictions must provide each child/student during a school year with:
   a. a minimum of 475 hours of ECS instruction (or 400 hours for children identified as having severe disabilities or severe language delay); and,
   b. a minimum of 950 hours of instruction for Grade 1-9.

7. Any school jurisdiction providing less than 475 hours (or 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.

8. 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.

9. 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:
   b. the student meets the criteria of a student;
   c. the activity program is not offered in Alberta;
   d. the student was selected by audition or another substantive selection method to be part of the program; and
   e. 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

<table>
<thead>
<tr>
<th>Students in their first, second, or third year of high school</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade 10-12 WMA Enrolment × 100% of High School Base Rate</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Students in their fourth year of high school</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade 10-12 WMA Enrolment × 50% of High School Base Rate</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Students beyond their fourth year of high school</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade 10-12 WMA Enrolment × 25% of High School Base Rate</td>
</tr>
</tbody>
</table>

Allocation Criteria

1. School jurisdictions must provide students with a minimum of 1000 hours of instructional time for Grades 10-12, timetabled for both the student and the teacher, for the delivery of authorized and approved courses or programs of study.

2. RAP, work experience and special projects courses must be 25 hours of instruction per credit, in accordance with the Guide to Education.

3. Students in Grade 10-12 attending outreach programs will be counted toward the WMA enrolment of the school jurisdiction.
4. High school students in an online program completing 30 or more credits are counted toward the WMA enrolment of the school jurisdiction.

5. High school students in an online program completing fewer than 30 credits are counted toward the WMA enrolment of the school jurisdiction. 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 completed per student in the summer for high school courses. Please refer to Section H of the manual for funding rates per credit.

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. Please refer to Section H of the manual for funding rates per credit.

8. 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 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. Funding is provided for credits granted through challenge assessments during summer school at 20 per cent of the credit value for the course(s) challenged. Funding will not be provided for challenge assessments and course completions for the same course in the same semester.
4. 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.
5. RAP, Work Experience and special projects courses are required to provide 25 hours per credit, in accordance with the Guide to Education.
6. Summer school funding will be calculated using the previous school year’s completed credits.

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:

\[
\text{WMA Enrolment Online Students} \times \text{High School Student Base Funding Rate}
\]

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:

\[
\text{WMA Enrolment Online Students} \times \text{Part-Time Online Student Rate}
\]

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:

1. out-of-district students; or,
2. students registered currently with another school jurisdictions, including students registered with private and charter schools;

Based on the following tiered allocation formula:

- $50,000 for 1 to 100 students
- $175,000 for 101 to 250 students
- $375,000 for 251 to 500 students
- $500,000 for 500+ students

Funding level is based on the previous year’s non-primary out-of-districts student enrolment.

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).

Allocation Criteria

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:

- 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.
- Students enrolled in these programs must be identified through student grant 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.
- 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).

Year 2: (2021/2022):
In addition to the criteria specified in Year 1, the following assurance measures will be applied in Year 2:

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

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.

C1.6 – Home Education 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 material costs.
Allocation Formula

Weighted Moving Average (WMA) Enrolment (Home Education Students) x Home Education Rate

Allocation Criteria

1. Home Education funding will be calculated using the three-year Weighted Moving Average (WMA) enrolment methodology as defined in Section C1.1 of the manual.
2. 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.
3. 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).
4. Home education funding is provided to support the education of Alberta students from Grades 1-12.
5. Home education students and their parents must reside in Alberta on the September count date of the current school year.
6. Home education students in accredited funded private schools are not eligible for severe disabilities funding.
7. 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.
8. 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.
9. School authorities will be required to provide information related to unclaimed/declined portion of the Home Education grant in the Audited Financial Statements (AFS).

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

School Jurisdictions with an Outreach Program x $100,000

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

<table>
<thead>
<tr>
<th>Groups</th>
<th>WMA Enrolment (FTE) Threshold</th>
<th>Block Funding Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hutterite Colony Schools</td>
<td>N/A</td>
<td>$12,500+Base Instruction Funding per WMA FTE</td>
</tr>
<tr>
<td>Group 1</td>
<td>&lt; 35</td>
<td>$25,000+Base Instruction Funding per WMA FTE</td>
</tr>
<tr>
<td>Group 2</td>
<td>=&gt; 35 &lt; 55</td>
<td>$450,000</td>
</tr>
<tr>
<td>Group 3</td>
<td>=&gt; 55 &lt; 75</td>
<td>$620,000</td>
</tr>
<tr>
<td>Group 4</td>
<td>=&gt; 75 &lt; 95</td>
<td>$750,000</td>
</tr>
<tr>
<td>Group 5</td>
<td>=&gt; 95 &lt; 115</td>
<td>$860,000</td>
</tr>
<tr>
<td>Group 6</td>
<td>=&gt; 115 &lt; 135</td>
<td>$940,000</td>
</tr>
<tr>
<td>Group 7</td>
<td>=&gt; 135 &lt; 155</td>
<td>$1,000,000</td>
</tr>
</tbody>
</table>

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 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:
   a. Outreach Schools
   b. Online Schools / Online Learning Centers
   c. Home-Based Programs
   d. Alternative Programs
   e. Other schools of choice

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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 continuum supports to students with learning disabilities 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:

I. Multi-Disciplinary Team (MDT) Allocation
II. Jurisdiction Composition Allocation
III. Mental Health Program Allocation

Allocation Formulas

Multi-Disciplinary Team (MDT) Allocation

Funding is provided for a multi-disciplinary team for all school authorities, which will help to build school authorities’ capacity and support special education assessments, while helping teachers, educational assistants, and other professionals better understand and adapt to the unique needs of their students. The MDT allocation is calculated as follows:

Base Allocation: $5000 \times WMA FTE enrolment^{0.660} + WMA FTE Student Allocation: $425 \times WMA FTE Enrolment

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.

Mental Health Program Allocation:

Mental health disorders 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 authorities to offer mental health support programs, which will help to improve educational outcomes of all schools. Mental Health Program funding will be allocated as follows:

Base Allocation $5000 \times WMA FTE enrolment^{0.45} + School Jurisdiction’s Proportional Share of the WMA FTE Enrolment

Note: School authorities’ 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 for severe disabilities is based on the WMA FTE of eligible children/students.
3. Accredited funded private schools and private Early Childhood Services (ECS) operators are not eligible to receive funding under this section.

Charter Schools

SLS funding for Charter Schools is comprised of three allocations:

I. Multi-Disciplinary Team (MDT) Allocation
II. Jurisdiction Composition Allocation
III. Mental Health Program Allocation

Allocation Formulas

Multi-Disciplinary Team (MDT) Allocation:

Base Allocation $2500 x WMA FTE enrolment^{0.330}

WMA FTE Student Allocation ($212.50 x WMA FTE Enrolment)

Jurisdiction Composition Allocation

The Jurisdiction Composition element will be allocated using the Charter Schools 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 total allocated for each charter schools.

Mental Health Program Allocation:

Mental Health Program funding will be allocated as follows:

Base Allocation $2500 x WMA FTE enrolment^{0.230}

Charter’s Proportional Share of Total Charter WMA FTE Enrolment

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 in the 2020/21 school year to be funded under the “SLS Grant for Charter Schools”. This option will be provided for one-year only to inform future decisions on this funding approach.
2. Funding will be provided to charter schools that choose to continue under the Severe Disabilities Funding Model will be funded based on the eligibility of individual students and on the severe disability rates in Section H.
3. Charter schools will use the severe disabilities categories and codes outlined in the Special Education Coding Criteria and the handbook for the identification. Severe disability funding will be based on approval of the student’s eligibility by the Learner Services Branch.
4. 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 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 authorities for students who require additional support in the English language. Both Canadian-born students and foreign-born students are eligible for ESL funding.

Allocation Formula

\[
\text{ESL WMA FTE enrolment} \times \text{ESL Rate}
\]

Allocation Criteria

1. 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.

2. Children/students who have been assessed as needing English language supports must be coded as either ESL-Funded Foreign born (code 301) or ESL-Funded Canadian born (code 303).

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 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;
   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. Funding is provided for a total of five years (including pre-kindergarten and kindergarten) for the Refugee Student and ESL grants (e.g., a student coded as ESL for pre-K would may only be included in the WMA enrolment calculation for the Refugee Student Grant for four years), irrespective of any moves between school jurisdictions.

7. Children in pre-K and Kindergarten will be counted 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 students who require additional French language supports.
Allocation Formula

<table>
<thead>
<tr>
<th>Francisation WMA FTE enrolment</th>
<th>x</th>
</tr>
</thead>
<tbody>
<tr>
<td>Francisation Rate</td>
<td></td>
</tr>
</tbody>
</table>

Allocation Criteria

1. The Francisation grant is available for Francophone Regional Authorities only.
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 French language supports.
3. **Children/students** who have been assessed as needing French language supports must be coded as either Francisation-Funded Foreign born (code 307) or Francisation-Funded Canadian born (code 306).
4. Funding allocation for the Francisation grant will be calculated based on the Francisation Grant Weighted Moving Average (WMA) FTE enrolment.
5. The calculation of Francisation-grant WMA FTE will include **children/students** who meet the following criteria:
   a. Aged 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.
6. **Children/students** included under PUF or Refugee Student Grants WMA enrolment calculations may not be included in the Francisation WMA enrolment calculation;
7. Funding is provided for a total of five years (including pre-kindergarten and kindergarten) under the Refugee Student and Francisation grants combined.
8. A child/student may be included in both Francisation grant and ESL grant WMA enrolment calculations.
9. Children/students in pre-K and Kindergarten will be counted as 0.5 FTE for Francisation grant WMA calculation.

C2.4 – Refugee Student Grant

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

Allocation Formula

<table>
<thead>
<tr>
<th>Refugee Student WMA FTE enrolment</th>
<th>x</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refugee Student Rate</td>
<td></td>
</tr>
</tbody>
</table>

Allocation Criteria

1. **Students** who present approved refugee status from Immigration, Refugees and Citizenship Canada are considered in the allocation of this grant. School Authorities 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 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 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. Funding is provided for a total of five years (including kindergarten) under the **Refugee Student** and ESL/Francisation grants combined, irrespective of any moves between school jurisdictions.

5. Students in Kindergarten will be counted 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 facilities licensed by Children’s Services. In the 2020/21 school year, funding is provided based on the last three years’ actual average cost (i.e. 2017/18, 2018/19 and 2019/20 school years) of the program 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 group home to which this clause applies that is approved by the Government of Alberta.

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 grant code 550 has been used in PASI for registering all eligible **students** in the 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.

Other Specialized Education Programs

Other Specialized Education Programs include education programs in emergency women’s shelters, hospitals and facilities that are not licensed by Children’s Services as residential facilities.

Allocation Criteria

1. Funding is provided for education currently provided 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’ actual average cost (i.e. the 2017/18, 2018/19 and 2019/20 school years) of the program.
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 “Other Specialized Program”.
4. Private school authorities are not eligible to receive severe disabilities funding for students in an “Other Specialized 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 an Other Specialized Education Program are required to:
   a. ensure that all eligible students in the institution are registered in PASI using the grant 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.

C2.6 – 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.

Allocation Formula

The ECS PUF Grant is allocated using the Weighted Moving Average (WMA) enrolment of children more than 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 educational programming to all children with severe disabilities or delays involving language who are registered in pre-Kindergarten (pre-K).
ECS programs for pre-K registrations with codes 41 through 46:

Half-day: WMA of pre-K children identified as codes 41 through 46

x

Half-day rate for codes 41 to 46

***

Full-day: WMA of pre-K registration 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 identified as code 47

x

Half-day rate for code 47

***

Full-day: WMA of pre-K children identified as 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 funding, a child with a severe disability or severe language delay must be more than 2 years 8 months of age and less than 4 years 8 months of age on September 1.
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).
7. A school jurisdiction may operate a full day of 800 hour teacher-directed educational program and/or a half-day of 400 hour teacher-directed educational program under all of the following conditions:
   a. A certificated teacher must provide the child’s educational program.
   b. School jurisdictions must develop an Individualized Program Plan (IPP), which addresses the child’s learning in the educational setting, and the type, frequency and levels of specialized supports and services provided to support the education of the child.
   c. A program that is less than 400 hour teacher-directed educational program will not qualify for funding.
d. 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 compliance, monitoring and evaluation through both desk and on site visitations.

9. Only one school jurisdiction 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.

C2.7 – 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**

\[
\text{Provincial Total Truth and Reconciliation Support Amount} \times \frac{\text{School Jurisdiction’s Proportional Share of the WMA FTE Enrolment}}{} \]

**Student Self-Identification Allocation**

\[
\text{Self-Identified FNMI WMA FTE Enrolment} \times \frac{\text{FNMI Rate}}{} \]

**School and Community Demographic Allocation**

\[
\text{Provincial Total School and Community Demographic Allocation} \times \frac{\text{School Jurisdiction Proportional Share of the WMA FTE factoring self-identification and FNMI census population}}{} \]

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:

\[
\frac{(\text{incidence of self-identification}) \times (\text{FNMI incidence in population}) \times WMA}{\sum((\text{incidence of self-identification}) \times (\text{FNMI incidence in population}) \times WMA)}
\]

**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 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**

\[
\text{WMA Funding (WMA FTE Enrolment x Rate)} + \text{Utilized Space Funding} + \text{Underutilized Space Funding}
\]

**Allocation Criteria**

**WMA Funding**

The Operations and Maintenance FTE is based on the Weighted Moving Average (WMA) as defined in the Base Instruction Funding. For the purpose of this grant a child in Early Childhood Services (ECS) is counted at 0.5 FTE.
School Space Funding – 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
   b. Underutilized area in square meters x Utilized Rate

3. The following schools are excluded from school space funding under this section: outreach, home education, alternative programs, Hutterite colonies, and other schools of choice.

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.

For subsequent budget years, the area used in the formula will reflect the data available through the School Facilities Database System at the time the funding is calculated, plus a projection from school jurisdictions for new or closed school(s) space area for the upcoming school year.

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 Operations and Maintenance 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 Operations and Maintenance cost regardless of where the cost is incurred within the jurisdiction.

• **Telephones**
  o All landline charges should be charged to Operations and Maintenance.
  o 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.
  o 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**
  o 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**
  o All custodial charges and costs related to cleaning supplies should be reported as Operations and Maintenance with the exception of central administration and student transportation. These should be charged to System Administration and Transportation respectively.

• **Amortization**
  o All building amortization should be charged to OM 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**
  o All costs related to the SuperNet should be charged to Instruction.

• **External Services**
  o Any costs related to External Services should be allocated to External Services on a pro-rata basis.

### Reporting

School boards are required to include an audited schedule for operations and maintenance 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 operations and maintenance.

As this is a targeted grant allocation, any unspent allocation is tracked and accounted for in an accumulated reserve schedule for future expenditures in operations and maintenance. 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 operations and maintenance schedule from other grants of the Assurance Framework.
C3.2 – Transportation Grant

Allocation Formula

| 2019/20 Transportation Funding Amount | + | 5% Supplemental Funding |

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.

a. the effective transportation area of the school jurisdiction is that taken as of the September count date.

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

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

d. individual bus route lists that include stop locations and students transported;

e. a list of names of eligible transported ECS children transported by bus, and the names and grades of eligible passengers;

f. records of route distance verified by an official(s) of the school jurisdiction;

g. copies of educational services agreements;

h. copies of transportation agreements with school boards, private schools, charter schools and private ECS operators;

i. copies of completed route risk assessment forms;

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

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.
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.

4. SuperNet Service funding is calculated on a monthly basis and provided for each approved site as follows:
   a. **school jurisdictions** and **Francophone Regional Authorities** 100 per cent;
   b. level 1 **accredited funded private schools** 60 per cent;
   c. level 2 **accredited funded private schools** 70 per cent;
   d. **private ECS operators** 50 per cent (payment for connection after the 1st of the month will be prorated).

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

5. 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.

6. 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**

7. **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.

8. **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.

**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**

\[
\text{Provincial Total SES Grant for School Year} \times \left( \frac{\text{School Jurisdiction’s SES-Index-Weighted Share}}{\sum (\text{SES Index} \times \text{WMA})} \right)
\]

**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. \[\text{SES Index Weighted Share} = \frac{\text{SES Index} \times \text{WMA}}{\sum (\text{SES Index} \times \text{WMA})}\]
6. The SES Indexes for school jurisdictions are listed in Section N.
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

\[
\begin{align*}
\text{Total Provincia} & \text{l Rurality Factor Allocation for School Year } \times \\
\text{School Jurisdiction’s Rurality Factor Index-Weighted Share} & \\
+ & \\
\text{Total Provincia} & \text{l Sparsity-Distance Allocation for School Year } \times \\
\text{School Jurisdiction’s Sparsity-Distance Factor Index-Weighted Share} & \\
+ & \\
\text{Total Provincia} & \text{l Northern Location Allocation for School Year } \times \\
\text{School Jurisdiction’s Northern Location Factor Index-Weighted Share} & \\
+ & \\
\text{Jurisdiction Rural Area Allocation for School Year} & \\
\end{align*}
\]

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 55\textsuperscript{th} 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. \( \text{Geographic Factor Weighted Share} = \frac{\text{Geographic Factor Index} \times \text{WMA}}{\sum (\text{Geographic Factor Index} \times \text{WMA})} \)
6. Area allocation is calculated by multiplying the area factor with the area base rate.
7. The Geographic Factor Indices for school jurisdictions are listed in Section N.

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

Weighted Moving Average (WMA) FTE Allocation + Socio-Economic Status (SES) Allocation

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 N.

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

Weighted Moving Average (WMA) FTE x FEA Rate

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

# of Eligible FTE Employees x $1,040 Per Month

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

The System Administration Grant is provided to school jurisdictions for expenses relating to system administration. This includes administration buildings, some General Services Management expenses, Board Governance, Superintendent and Senior Executive Team, and insurance.

Administration Buildings
Activities relating to the administration building of the school board and any area offices are System Administration costs, including:
- Operating costs (Utilities should be charged to POM except for Administration Buildings)
- Property insurance on administration buildings
- Lease payments/rental payments/mortgage payments and interest expense
- Amortization

This does not include any schools, plant operation and maintenance shops and buildings, student transportation buildings bus barns used exclusively for these functions. Costs for Administration Buildings that are shared facilities should be allocated to the respective programs based on square footage. For example, a building that houses central administration, operations and maintenance, and transportation should be divided based on square footage allocated between System Administration, OM and Transportation.

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.

General Services Management
General services management includes:
- Finance
- Payroll
- Human Resources
- Purchasing
- Information Technology (I.T.)
• Communications, Public Relations, Marketing
• Legal
• Internal Audit
• FOIP, Corporate Records, Records Management, Student Records
• Occupational Health and Safety

Payroll and legal services should be allocated entirely to System Administration. All other costs 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. For example, an accountant who provides services exclusively to schools should not be included in System Administration.

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 Operations and Maintenance. 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.

Superintendent and Senior Executive Team
Superintendent and Senior Executive Team includes:

• The Superintendent;
• Assistant, Associate, and Deputy Superintendents;
• Secretary, Treasurer or Secretary Treasurer or any other employee reporting directly to the Superintendent who is a member of the Executive Team.

It does not include individuals involved in operational activities and reporting to the Superintendent but not on the Executive Team. For example, a director of transportation or curriculum reporting to the Superintendent but not on the Executive Team would not be included in this category. Alternately, an Assistant or Associate Superintendent who administers curriculum but is a member of the Executive Team is to be classified as System Administration. A school principal would not be included as system administration.

Allocation Formula

\[
\text{Allocation Formula} = \frac{(\text{Base Funding} + (\text{WMA FTE Students} \times \text{System Administration Rate}))}{\text{Adjustment Factor}}
\]

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.

4. 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.

5. As this is a targeted grant allocation, any unspent allocation is tracked and accounted for in an accumulated reserve schedule for future expenditures in system administration. Authorities may use these reserves to fund other areas of the education system.
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:

<table>
<thead>
<tr>
<th>School Year</th>
<th>Weighted Factor</th>
<th>Enrolment Count (FTE)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018/19</td>
<td>20%</td>
<td>Actual</td>
</tr>
<tr>
<td>2019/20</td>
<td>30%</td>
<td>Estimates</td>
</tr>
<tr>
<td>2020/21</td>
<td>50%</td>
<td>Projection</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>School Year</th>
<th>Weighted Factor</th>
<th>Enrolment Count (FTE)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018/19</td>
<td>20%</td>
<td>16,480</td>
</tr>
<tr>
<td>2019/20</td>
<td>30%</td>
<td>16,700</td>
</tr>
<tr>
<td>2020/21</td>
<td>50%</td>
<td>16,850</td>
</tr>
</tbody>
</table>

WMA Enrolment (FTE) = (16,480*20% + 16,700*30% + 16,850*50%) = 16,731

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

<table>
<thead>
<tr>
<th>School Year</th>
<th>Weighted Factor</th>
<th>Enrolment Count (FTE)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018/19</td>
<td>20%</td>
<td>5,460</td>
</tr>
<tr>
<td>2019/20</td>
<td>30%</td>
<td>5,400</td>
</tr>
<tr>
<td>2020/21</td>
<td>50%</td>
<td>5,350</td>
</tr>
</tbody>
</table>

WMA Enrolment (FTE) = (5,460*20% + 5,400*30% + 5,350*50%) = 5,387

The projected enrolment count will be determined based 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 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

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Actual count</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>16480</td>
<td>16700</td>
<td>16800</td>
<td></td>
</tr>
<tr>
<td><strong>Projected count</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>16850</td>
<td></td>
<td>16876</td>
<td></td>
</tr>
<tr>
<td><strong>WMA for 2020-2021 funding calculations</strong> (calculated in Feb 2020 using 2020-2021 projected count)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>20%*16480 + 30%*16700 + 50%*16850 = 16731</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>WMA verification for 2020-2021</strong> (calculated in Dec 2020 using 2020-2021 actual count)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>20%*16480 + 30%*16700 + 50%*16800 = 16706</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>WMA adjustment</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>16731 – 16706 = 25</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>WMA for 2021-2022</strong> (calculated in Feb 2021)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>(20%*16700 + 30%*16800 + 50%*16876) – 25 = 16793</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### D1.2 – ECS to Grade 9 Base Instruction Funding

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 students.

**Allocation Formula**

\[
\text{Base Instruction Rate (applicable grade level rate)} \times \text{Weighted Moving Average (WMA) Enrolment (applicable grade)}
\]

**Allocation Criteria**

1. All children/students who are at least 2 years, 8 months of age, but less than 20 years of age on September 1 will be counted toward the WMA enrolment calculation for this grant.
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.” Students who were placed in the ECS program at Accredited Funded Private Schools will be counted toward the WMA enrolment calculation.
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 400 hours for children identified as having severe disabilities or delay); and,
   b. a minimum of 950 hours of instruction for Grade 1-9.
6. Any school authority providing less than 475 hours (or 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.

**D1.3 – High School Base Instruction Funding**

High school funding will be 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) will be offered.

**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. School authorities must provide students with a minimum of 1000 hours of instructional time for Grades 10-12, timetabled for both the student and the teacher, for the delivery of authorized and approved courses or programs of study.

2. RAP, Work Experience and special projects courses are required to provide 25 hours per credit, in accordance with the Guide to Education.

3. 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.

4. 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.

5. 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.

6. 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. Please refer to Section H of the manual for funding rates per credit.

7. The following decision tree shows how the high school funding would be determined under the new funding 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. Funding is provided for credits granted through challenge assessments during summer school at 20 per cent of the credit value for the course(s) challenged. Funding will not be provided for challenge assessments and course completions for the same course in the same semester.
4. 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.
5. RAP, Work Experience and special projects courses are required to provide 25 hours per credit, in accordance with the Guide to Education.
6. Summer school funding will be calculated using the previous school year’s completed credits.
D1.5 – Distance Education Grant

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:

\[
\text{WMA Enrolment Online Students (30 credits or Higher for high school students)} \times \text{High School Student Base Funding Rate}
\]

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:

\[
\text{WMA Enrolment Online Students (<30 credits for high school students)} \times \$1,000
\]

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; or,
- students registered currently with another school authority, including students registered with private and charter schools;

based on the following tiered allocation formula:

- $35,000 for 1 to 100 students;
- $122,500 for 101 to 250 students;
- $262,500 for 251 to 500 students; and
- $350,000 for 500+ students.

The funding level is based on the previous years’ non-primary out-of-districts student enrolment.
Allocation Criteria

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:

- **Students** who are not actively attending to learning as identified through learning management system data analytics and/or attendance monitoring documentation must be removed from the school’s student information system prior to the count date(s).
- **Students** enrolled in these programs must be identified through student grant 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.
- 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).

Year 2: (2021/2022):
In addition to the criteria specified in Year 1, the following assurance measures will be applied:

- Minimum course completion rate (TBD);
- Minimum PAT participation rate (TBD);
- Evidence of daily, scheduled, synchronous instruction must be demonstrated for students in grades 1 to 9; and
- Willingness to openly share digital resources/courses with other school authorities.

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.

D1.6 – Home Education Grant

Allocation Formula

\[
\text{Home Education Weighted Moving Average (WMA) Enrolment} \times \text{Home Education Rate}
\]

Allocation Criteria

1. The Home Education Grant is based on the Weighted Moving Average (WMA) enrolment as defined in the Base Instruction Funding in Section D1.1. The Home Education Grant supports students in 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).

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

**Allocation Formula**

<table>
<thead>
<tr>
<th>Allocation for Students with Mild or Moderate Disabilities in DSEPS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weighted Moving Average (WMA) <strong>Students</strong> with Mild/Moderate Disabilities/Delays in DSEPS x DSEPS Mild/Moderate Rate</td>
</tr>
<tr>
<td>or</td>
</tr>
<tr>
<td>Allocation for Students with Severe Disabilities in DSEPS (not including severe disabilities funding)</td>
</tr>
<tr>
<td>Weighted Moving Average (WMA) of Approved Students with Severe Disabilities in DSEPS x DSEPS Severe Disabilities Rate</td>
</tr>
</tbody>
</table>

**Allocation Criteria**

1. For more information on student eligibility for DSEPS, see section D2.3.
2. The **Base Instruction Grant** for **students** in Grades 1-12 with mild/moderate disabilities/delays 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**

**Allocation Formula**

| ESL Weighted Moving Average (WMA) FTE Enrolment x ESL Rate |
Allocation Criteria

1. The English as a Second Language (ESL) Grant is provided for children/students enrolled in Early Childhood Services (ECS)-Grade 12 in Accredited Funded Private Schools who require additional English language supports and instruction to achieve grade level expectations in English and other subject areas.
2. Documentation of an assessment, conducted within the past five years, must be kept on file at the accredited funded private school that provides the ESL supports.
3. Children/students eligible for inclusion in the WMA enrolment calculation for ESL funding must be coded as either:
   a. Foreign born code 301; or
   b. Canadian born code 303.
4. Children/students who require ESL support may be included in the WMA enrolment calculation for a maximum of five years. Children/students who require ESL support beyond five years should be coded as ESL non-funded (code 302). This coding should be maintained for as long as the child/student needs English language supports.
5. Funding allocation for ESL is based on the Weighted Moving Average (WMA) FTE enrolment of eligible children/students.
6. The calculation of ESL WMA FTE enrolment will include children/students:
   a. Aged 3 years 8 months as of September 1 of the school year;
   b. Enrolled in ECS to Grade 12 as an Alberta student;
   c. Has been included in the WMA FTE calculation for 5 or fewer school years.

Students enrolled in home education, outreach, print-based distance education or online programs are not eligible for inclusion in the WMA enrolment calculation for this grant.

D2.2 – First Nations, Metis and Inuit Grant

Allocation Formula

FNMI Weighted Moving Average (WMA) FTE Enrolment
\[ \times \]
FNMI Rate

Allocation Criteria

1. 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, Métis and Inuit (FNMI) students.
2. Funding for accredited funded private schools is based on the number of self-identified FNMI FTE students only. Note: This does not include FNMI FTE children.
3. 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.
4. 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).
5. 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.
6. 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.

7. The grant allocation is calculated based on the Weighted Moving Average (WMA) FTE enrolment.

8. 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**

\[
\text{Severe Disabilities Weighted Moving Average (WMA) Enrolment} \\times \\
\text{Severe Disabilities Rate}
\]

**Allocation Criteria**

1. Accredited funded private schools and charter schools will use the severe disabilities categories and codes outlined in the Special Education Coding Criteria and the handbook for the Identification and Review of Students 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
D2.4 – ECS Program Unit Funding (PUF) Grant

The Early Childhood Services (ECS) Program Unit Funding (PUF) Grant will be allocated using the three-year Weighted Moving Average (WMA) enrolment of children ages 2 years 8 months to 5 years 8 months, who have been assessed and diagnosed with severe disability or a severe language delay. The WMA enrolment is used to allocate funding for Private ECS operators and accredited funded private schools with ECS programs to provide teacher-directed educational programming to all children who have registered and have severe disabilities or severe delays involving language. For more information on the WMA methodology, please refer to Section D1.1

Allocation Formula

ECS registrations with codes 41 through 46:

<table>
<thead>
<tr>
<th>Half-day: WMA of ECS children identified as codes 41 through 46</th>
<th>x</th>
<th>Half-day rate for codes 41 to 46</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-day: WMA of ECS children identified as codes 41 through 46</td>
<td>x</td>
<td>Full-day rate for codes 41 to 46</td>
</tr>
</tbody>
</table>

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 registrations with code 47:

<table>
<thead>
<tr>
<th>Half-day: WMA of ECS children identified as code 47</th>
<th>x</th>
<th>Half-day rate for code 47</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-day: WMA of ECS children identified as code 47</td>
<td>x</td>
<td>Full-day rate for code 47</td>
</tr>
</tbody>
</table>

Allocation Criteria

1. PUF may be paid to a private ECS operator or 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 funding, a child with a severe disability or severe language delay must be more than 2 years 8 months of age and less than 5 years 8 months of age on September 1.
3. Private ECS operators or 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. Private ECS operators or 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 private ECS operators or accredited funded private schools with an ECS program 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 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).

7. A private ECS operator or accredited funded private school with an ECS program may operate a full day of 800 hours teacher directed educational program and/or a half-day of 400 hour teacher directed educational program under all of the following conditions:
   a. A certificated teacher must provide the child's educational program.
   b. A private ECS operator or accredited funded private school with an ECS program must develop an Individualized Program Plan (IPP), which addresses the child's learning in the educational setting, and the type, frequency and levels of specialized supports and services provided to support the education of the child.
   c. A program that does not provide a minimum of 400 hour teacher directed educational program will not be funded.
   d. 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 compliance, monitoring and evaluation through both desk and on site visitations.

9. Only one private ECS operator or 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/Delays, Gifted and Talented Grant

Allocation Formula

Weighted Moving Average (WMA) Enrolment of children identified as code 30 or 80 X Mild/Moderate and Gifted and Talented Rate

Allocation Criteria

1. Children with mild/moderate disabilities/delays, or those who are gifted and talented, must be at least 3 years 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.
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.
D3 – School Based Grants

D3.1 – Operations and Maintenance Targeted Grant

Allocation Formula

\[
\text{Weighted Moving Average (WMA) FTE Enrolment} \times \text{Operations and Maintenance Rate}
\]

Allocation Criteria

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

D3.2 – Transportation Grant

Allocation Formula

In the 2020/2021 school year, accredited funded private schools that offer ECS programming will receive an allocation amount fixed to their last year’s transportation funding amount. This allocation will continue to be fixed until a new transportation model has been developed and implemented.

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

\[
\text{Base Allocation} + \text{WMA Student Allocation}
\]

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 C1 of the manual.
3. Funding rates per WMA FTE for private schools and Designated Special Education Private Schools (DSEPS) 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 Targeted 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. Accredited funded private schools 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 an authority, the maximum system administration funding this authority will receive will be capped at $400,000.
3. 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 Funding

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:

<table>
<thead>
<tr>
<th>School Year</th>
<th>Weighted Factor</th>
<th>Enrolment Count (FTE)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018/19</td>
<td>20%</td>
<td>Actual</td>
</tr>
<tr>
<td>2019/20</td>
<td>30%</td>
<td>Estimates</td>
</tr>
<tr>
<td>2020/21</td>
<td>50%</td>
<td>Projection</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>School Year</th>
<th>Weighted Factor</th>
<th>Enrolment Count (FTE)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018/19</td>
<td>20%</td>
<td>16,480</td>
</tr>
<tr>
<td>2019/20</td>
<td>30%</td>
<td>16,700</td>
</tr>
<tr>
<td>2020/21</td>
<td>50%</td>
<td>16,850</td>
</tr>
</tbody>
</table>

WMA Enrolment (FTE) = (16,480*20% + 16,700*30% + 16,850*50%) = 16,731

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

<table>
<thead>
<tr>
<th>School Year</th>
<th>Weighted Factor</th>
<th>Enrolment Count (FTE)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018/19</td>
<td>20%</td>
<td>5,460</td>
</tr>
<tr>
<td>2019/20</td>
<td>30%</td>
<td>5,400</td>
</tr>
<tr>
<td>2020/21</td>
<td>50%</td>
<td>5,350</td>
</tr>
</tbody>
</table>

WMA Enrolment (FTE) = (5,460*20% + 5,400*30% + 5,350*50%) = 5,387

The projected enrolment count will be determined based 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 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

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual count</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Projected count</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>WMA for 2020-2021 funding calculations</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(calculated in Feb 2020 using 2020-2021 projected count)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>WMA verification for 2020-2021</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(calculated in Dec 2020 using 2020-2021 actual count)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>WMA adjustment</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>WMA for 2021-2022</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(calculated in Feb 2021)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### WMA for 2020-2021 funding calculations

\[
20\% \times 16480 + 30\% \times 16700 + 50\% \times 16850 = 16731
\]

#### WMA verification for 2020-2021

\[
20\% \times 16480 + 30\% \times 16700 + 50\% \times 16800 = 16706
\]

#### WMA adjustment

\[
16731 - 16706 = 25
\]

#### WMA for 2021-2022

\[
(20\% \times 16700 + 30\% \times 16800 + 50\% \times 16876) - 25 = 16793
\]

### E1.2 – ECS Base Instruction Grant

#### Allocation Formula

\[
\text{Weighted Moving Average (WMA) Enrolment} \times \text{ECS Base Instruction Rate}
\]

#### Allocation Criteria

1. **Children** with primary registration at an ECS operator as of September 30 will be counted toward then WMA enrolment calculation. Please refer to the Glossary for the definition of primary registration and non-primary registration.

2. The Early Childhood Services (ECS) Base Instruction grant will be allocated using the three-year Weighted Moving Average (WMA) enrolment of children of private ECS operators. The WMA is defined in the Base Instruction Funding in Part E1.1.

3. School authorities must provide each child with:
   - a minimum of 475 hours of ECS instruction (or 400 hours for children identified as having severe disabilities or delay); and,

4. Any school authority providing less than 475 hours (or 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.
10. A child/student who is at least 6 years of age but less than 7 years of age on September 1 may be counted toward ECS WMA enrolment (rather than Grades 1-9 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 over age child require special approval by the School Finance Branch.

E2 – Program Supports and Services

E2.1 – English as a Second Language Grant

Allocation Formula

\[
\text{ESL Weighted Moving Average (WMA) Enrolment} \times \text{ESL Rate}
\]

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 eligible for inclusion in the WMA enrolment calculation for ESL funding must be coded as either Foreign born code 301 or Canadian born code 303.
3. For the purpose of this grant an ECS child is counted at 0.5 FTE.
4. Funding allocation for ESL is based on the Weighted Moving Average (WMA) FTE enrolment of eligible children.
5. The calculation of ESL grant WMA FTE will include the following child/student:
   a. Aged 3 years 8 months as of September 1 of the school year;
   b. Enrolled in ECS; and
   c. Has been included in the WMA FTE enrolment calculation for five or fewer school years, irrespective of moves between school authorities/jurisdictions.

E2.2 – ECS Mild/Moderate Disabilities/Delays, Gifted, and Talented Grant

Allocation Formula

\[
\text{Weighted Moving Average (WMA) Children identified as codes 30 or 80} \times \text{Mild/Moderate and Gifted and Talented Rate}
\]

Allocation Criteria

1. Children with mild/moderate disabilities/delays or those who are gifted and talented must be at least 3 years 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.

**E2.3 – ECS Program Unit Funding (PUF) Grant**

Early Childhood Services (ECS) Program Unit funding (PUF) is provided to Private ECS operators to provide teacher-directed educational programming to all children who have been registered with severe disabilities or severe delays involving language.

**Allocation Formula**

**ECS programs for children registered with codes 41 through 46:**

\[
\begin{align*}
\text{Half-day: } & \text{WMA of ECS children identified as codes 41 through 46} \\
& \times \\
& \text{Half-day rate for codes 41 to 46} \\
& \text{***} \\
\text{Full-day: } & \text{WMA of ECS children identified as codes 41 through 46} \\
& \times \\
& \text{Full-day rate for codes 41 to 46}
\end{align*}
\]

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 with Code 47:**

\[
\begin{align*}
\text{Half-day: } & \text{WMA of ECS children identified as code 47} \\
& \times \\
& \text{Half-day rate for code 47} \\
& \text{***} \\
\text{Full-day: } & \text{WMA of ECS children identified as code 47} \\
& \times \\
& \text{Full-day rate for code 47}
\end{align*}
\]

**Allocation Criteria**

4. PUF may be paid to a Private ECS operator or 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.

5. To be eligible for funding, a child with a severe disability or severe language delay must be at least 2 years 8 months of age and 6 years of age on September 1.

6. Private ECS operator or 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.

7. Private ECS operator or 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 Private ECS operator or accredited funded private schools with an ECS program level and be made available to Alberta Education upon request.

8. 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.
   c. 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).
9. An Private ECS operator or accredited funded private school with an ECS program may operate a full day of 800 hour teacher-directed educational program and/or a half-day of 400 hour teacher-directed educational program under all of the following conditions:
   a. A certificated teacher must provide the child’s educational program.
   b. A Private ECS operator or accredited funded private school with an ECS program must develop an Individualized Program Plan (IPP), which addresses the child’s learning in the educational setting, and the type, frequency and levels of specialized supports and services provided to support the education of the child.
   c. A program that does not provide a minimum of 400 hour teacher directed educational program will not be funded.
   d. Programs less than 800 hours but greater than 400 hours will be funded as a half-day.

10. For compliance and monitoring purposes, Alberta Education will conduct PUF eligibility verifications to include file documentation eligibility, program hour requirements, program delivery elements, IPP compliance, monitoring and evaluation through both desk and on site visitations.

11. Only one Private ECS operator or accredited funded private school with an ECS program will be allowed to register a PUF eligible child for the same time period.
   a. Two separate 400 hour programs cannot be combined, or attended in two different authorities to create an 800 hour program.

12. Two separate 400 hour programs cannot be combined, or attended in two different authorities to create an 800 hour program.

13. 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.

**E3 – School-Based Grants**

**E3.1 – ECS Operations and Maintenance Targeted Grant**

**Allocation Formula**

\[
\text{Weighted Moving Average (WMA) Enrolment} \times \text{Operations and Maintenance Rate}
\]

**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 see Section C3.1.

**E3.2 – ECS Transportation Grant**

In the 2020/21 school year, private ECS operators will receive an allocation amount fixed to their last year’s transportation funding. The allocation will stay fixed until a new transportation model has been developed and implemented.

**E4 – System Administration**

**E4.1 –ECS System Administration Targeted 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 an authority, the maximum system administration funding this authority will receive will be capped at $400,000.
3. The System Administration allocation amount provided to each private ECS operator will be a fixed amount over the next three school years.
4. 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.
5. 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.
6. As this is a targeted grant allocation, any unspent allocation is tracked and accounted for in an accumulated reserve schedule for future expenditures in system administration. Authorities may use these reserves to fund other areas of the education system.
Section F - Federal French Language Funding

This section will appear in the final version of the Funding Manual
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.

<table>
<thead>
<tr>
<th>CONSORTIA NAMES</th>
<th>AGENT BOARD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calgary Regional Consortium</td>
<td>The Canadian Rockies School Division</td>
</tr>
<tr>
<td>Central Alberta Regional Consortium</td>
<td>The Red Deer School Division</td>
</tr>
<tr>
<td>Consortium Provincial Francophone</td>
<td>The Southern Francophone Education Region</td>
</tr>
<tr>
<td>Edmonton Regional Learning Consortium</td>
<td>The Elk Island Catholic Separate School Division</td>
</tr>
<tr>
<td>Learning Network</td>
<td>The Lakeland Roman Catholic Separate School Division</td>
</tr>
<tr>
<td>Northwest Regional Learning Consortium</td>
<td>The Grande Prairie School Division</td>
</tr>
<tr>
<td>Southern Alberta Regional Professional Development Consortium</td>
<td>The Lethbridge School Division</td>
</tr>
</tbody>
</table>
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 the implementation of provincial curriculum in Alberta. This section further outlines the associated planning and reporting cycle.

Allocation Formula

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

Allocation Criteria

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

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

Concluding the Cycle - Reporting
4. A mid-year report will be submitted to QASS by January 31, 2020, of the same school year and a final report to conclude the cycle, providing program details and results achieved, in draft form, no later than October 30, 2020 followed by a final version of the report and a financial statement by December 31, 2020.
5. QASS monitors the consortia’s activities related to priorities and ensures accountability through:
   a. ongoing communication with each consortia;
   b. attendance at selected meetings of consortia executive directors;
   c. monitoring of consortia websites;
   d. mid-year review meetings with each consortium; and
   e. mid-year and final reports submitted by each consortium.
Section H – Payments to School Authorities

H1 – School Jurisdiction Funding Rates

H1.1 Funding Rates for School Jurisdictions

<table>
<thead>
<tr>
<th>School Jurisdiction Funding Rates</th>
<th>2020/21 School Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
<td></td>
</tr>
<tr>
<td><strong>Base Instruction (WMA Rate)</strong></td>
<td></td>
</tr>
<tr>
<td>ECS Base Instruction</td>
<td>$3,032.00</td>
</tr>
<tr>
<td>Grades 1 to 9 Base Instruction</td>
<td>$6,064.00</td>
</tr>
<tr>
<td>Grades 10 to 12 (Year 1 - 3)</td>
<td>$6,670.40</td>
</tr>
<tr>
<td>Grades 10 to 12 (Year 4)</td>
<td>$3,335.20</td>
</tr>
<tr>
<td>Grades 10 to 12 (Year 5 and above)</td>
<td>$1,667.60</td>
</tr>
<tr>
<td>Summer School (per completed credit)</td>
<td>$143.00</td>
</tr>
<tr>
<td>Home Education</td>
<td>$1,700</td>
</tr>
<tr>
<td>Outreach (per School Jurisdiction)</td>
<td>$100,000</td>
</tr>
<tr>
<td><strong>Distance Education</strong></td>
<td></td>
</tr>
<tr>
<td>Grade 10 to 12 - Online (&gt; = 30 Credits)</td>
<td>$6,670.40</td>
</tr>
<tr>
<td>Grade 10 to 12 - Online (&lt; 30 Credits)</td>
<td>$1,000.00</td>
</tr>
<tr>
<td><strong>Distance Education (Non Primary Registration)</strong></td>
<td></td>
</tr>
<tr>
<td>1 to 100 Students</td>
<td>$50,000</td>
</tr>
<tr>
<td>101 to 250 Students</td>
<td>$175,000</td>
</tr>
<tr>
<td>251 to 500 Students</td>
<td>$375,000</td>
</tr>
<tr>
<td>500 + Students</td>
<td>$500,000</td>
</tr>
<tr>
<td>Rural Small Schools Grant (See Section C 1.8)</td>
<td></td>
</tr>
</tbody>
</table>
### Services & Supports Grants

<table>
<thead>
<tr>
<th>Description</th>
<th>Funding Per WMA FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Specialized Learning Support (see Section C.2.1)</strong></td>
<td></td>
</tr>
<tr>
<td>Base Allocation</td>
<td></td>
</tr>
<tr>
<td>WMA Student Rate</td>
<td>$425.00 per formula</td>
</tr>
<tr>
<td>Jurisdiction Composition Allocation</td>
<td></td>
</tr>
<tr>
<td>Mental Health Program</td>
<td></td>
</tr>
<tr>
<td><strong>Specialized Learning Support - Charter Schools</strong></td>
<td></td>
</tr>
<tr>
<td>WMA Student Rate</td>
<td>$212.50 per formula</td>
</tr>
<tr>
<td>Jurisdiction Composition Allocation</td>
<td></td>
</tr>
<tr>
<td>Mental Health Program</td>
<td></td>
</tr>
<tr>
<td><strong>English as a Second Language (WMA Rate)</strong></td>
<td>$1,200.00</td>
</tr>
<tr>
<td><strong>Francisation (WMA Rates)</strong></td>
<td>$1,200.00</td>
</tr>
<tr>
<td><strong>Refugee Student Grant (WMA Rate)</strong></td>
<td>$5,500.00</td>
</tr>
<tr>
<td><strong>Education Program in an Institution</strong> (see Section C.2.5)</td>
<td>3 Year Average net cost of approved programs</td>
</tr>
<tr>
<td><strong>ECS Program Unit Funding (PUF)</strong></td>
<td></td>
</tr>
<tr>
<td>Code (41 to 46)</td>
<td></td>
</tr>
<tr>
<td>Half Day (Minimum of 400 Hours)</td>
<td>$15,000.00</td>
</tr>
<tr>
<td>Full Day (Minimum of 800 Hours)</td>
<td>$25,000.00</td>
</tr>
<tr>
<td>Code 47</td>
<td></td>
</tr>
<tr>
<td>Service Description</td>
<td>Amount</td>
</tr>
<tr>
<td>-----------------------------------------------------------------------------------</td>
<td>----------</td>
</tr>
<tr>
<td>Half Day (Minimum of 400 Hours)</td>
<td>$10,000.00</td>
</tr>
<tr>
<td>Full Day (Minimum of 800 Hours)</td>
<td>$17,000.00</td>
</tr>
<tr>
<td><strong>First Nations, Métis and Inuit Education</strong></td>
<td></td>
</tr>
<tr>
<td>Truth and Reconciliation Support</td>
<td>per formula</td>
</tr>
<tr>
<td>FNMI Student Support Self-Identified (WMA Rate)</td>
<td>$1,200.00</td>
</tr>
<tr>
<td>FNMI Student Support (Census Adjustment)</td>
<td>per formula</td>
</tr>
<tr>
<td><strong>School Based Grants</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Operations &amp; Maintenance Grant</strong></td>
<td></td>
</tr>
<tr>
<td>WMA Student Allocation (WMA Rate)</td>
<td>$218.00</td>
</tr>
<tr>
<td>Utilized Area (per square meter)</td>
<td>$65.00</td>
</tr>
<tr>
<td>Underutilized Area (per square meter)</td>
<td>$46.00</td>
</tr>
<tr>
<td>Charter Schools (WMA Rate)</td>
<td>$750.00</td>
</tr>
<tr>
<td>Transportation Grant</td>
<td></td>
</tr>
<tr>
<td>2019/20 SY Allocation × 1.05</td>
<td></td>
</tr>
<tr>
<td><strong>SuperNet Services</strong> (max. per month per approved site)</td>
<td>$800.00</td>
</tr>
<tr>
<td><strong>Community Based Grants</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Socio- Economic Status Grant (See Section C4)</strong></td>
<td>per formula</td>
</tr>
<tr>
<td><strong>Geographic Grant (See Section C4)</strong></td>
<td>per formula</td>
</tr>
<tr>
<td><strong>School Nutrition Grant</strong></td>
<td></td>
</tr>
<tr>
<td><strong>WMA Category (Non-Metro Authorities)</strong></td>
<td>WMA Allocation</td>
</tr>
<tr>
<td>More than 5,000</td>
<td>$150,000.00</td>
</tr>
<tr>
<td>2,501 to 5,000</td>
<td>$100,000.00</td>
</tr>
<tr>
<td>1,001 to 2,500</td>
<td>$50,000.00</td>
</tr>
<tr>
<td>1,000 or less</td>
<td>$10,000.00</td>
</tr>
<tr>
<td><strong>WMA Category (Metro Authorities)</strong></td>
<td></td>
</tr>
<tr>
<td>More than 75,000</td>
<td>$1,200,000.00</td>
</tr>
<tr>
<td>75,000 or less</td>
<td>$550,000.00</td>
</tr>
<tr>
<td><strong>SES Category (Non-Metro Authorities)</strong></td>
<td></td>
</tr>
<tr>
<td>Five (Lowest SES)</td>
<td>$200,000</td>
</tr>
<tr>
<td>Four</td>
<td>$125,000</td>
</tr>
<tr>
<td>Three</td>
<td>$100,000</td>
</tr>
<tr>
<td>Two</td>
<td>$50,000</td>
</tr>
</tbody>
</table>
### SES Category (Metro Authorities)

<table>
<thead>
<tr>
<th>Category</th>
<th>Range</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Two to Five</td>
<td></td>
<td>$100,000</td>
</tr>
</tbody>
</table>

### Francophone Equivalency Access (WMA Rate)

- $125.00

### Fort McMurray Allowance (per eligible FTE employee)

- $1,040.00

### Jurisdiction Based Grants

<table>
<thead>
<tr>
<th>Category</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Administration Rate (See Section C5)</td>
<td>per formula</td>
</tr>
</tbody>
</table>

## H1.2 Funding Rates for Accredited Funded Private Schools

<table>
<thead>
<tr>
<th>Funding Rates for Accredited Funded Private Schools</th>
<th>2020/21 School Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
<td></td>
</tr>
</tbody>
</table>

### Base Instruction (WMA Rate)

<table>
<thead>
<tr>
<th>Instruction Type</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>ECS Base Instruction</td>
<td>$3,032.00</td>
</tr>
<tr>
<td>Grades 1 to 9 Base Instruction</td>
<td>$4,244.80</td>
</tr>
<tr>
<td>Grades 10 to 12 (Year 1 - 3)</td>
<td>$4,669.28</td>
</tr>
<tr>
<td>Grades 10 to 12 (Year 4)</td>
<td>$2,334.64</td>
</tr>
<tr>
<td>Grades 10 to 12 (Year 5 and above)</td>
<td>$1,167.32</td>
</tr>
<tr>
<td>Summer School</td>
<td>$100.10</td>
</tr>
<tr>
<td>Home Education</td>
<td>$1,700</td>
</tr>
<tr>
<td>Distance Education</td>
<td>$4,669.28</td>
</tr>
<tr>
<td>Grade 10 to 12 - Online (&gt; = 30 Completed Credits)</td>
<td>$700.00</td>
</tr>
</tbody>
</table>

### Distance Education (Non Primary Registration)

<table>
<thead>
<tr>
<th>Student Range</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 to 100 Students</td>
<td>$35,000</td>
</tr>
<tr>
<td>101 to 250 Students</td>
<td>$122,500</td>
</tr>
<tr>
<td>251 to 500 Students</td>
<td>$262,500</td>
</tr>
<tr>
<td><strong>500 + Students</strong></td>
<td>$350,000</td>
</tr>
<tr>
<td>-------------------</td>
<td>----------</td>
</tr>
</tbody>
</table>

**Base Instruction Funding for Designated Special Education Private Schools (DSEPS)**

- Funding rate for **students** with a mild or moderate disability: **$11,639**
- Students with severe disabilities in DSEPS (not including severe disabilities funding): **$7,537.59**

## Services & Supports Grants

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Severe Disabilities Funding (per eligible funded student)</td>
<td><strong>$16,465</strong></td>
</tr>
<tr>
<td>Mild/Moderate Disabilities/Delays, Gifted and Talented (WMA Rate)</td>
<td><strong>$2,486.76</strong></td>
</tr>
<tr>
<td>English as a Second Language (WMA Rate)</td>
<td><strong>$840.00</strong></td>
</tr>
<tr>
<td>Education Program in an Institution (see Section C 2.5)</td>
<td>3 Year Average net cost of approved programs</td>
</tr>
</tbody>
</table>

### ECS Program Unit Funding (PUF)

<table>
<thead>
<tr>
<th>Code (41 to 46)</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Half Day (Minimum of 400 Hours)</td>
<td><strong>$15,000.00</strong></td>
</tr>
<tr>
<td>Full Day (Minimum of 800 Hours)</td>
<td><strong>$25,000.00</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Code 47</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Half Day (Minimum of 400 Hours)</td>
<td><strong>$10,000.00</strong></td>
</tr>
<tr>
<td>Full Day (Minimum of 800 Hours)</td>
<td><strong>$17,000.00</strong></td>
</tr>
</tbody>
</table>

**First Nations, Métis and Inuit Education**

- FNMI Student Support Self-Identified (WMA Rate): **$840.00**

## School Based Grants

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operations &amp; Maintenance Grant (WMA Rate)</td>
<td><strong>$525.00</strong></td>
</tr>
<tr>
<td>Transportation Grant</td>
<td>2019/20 SY Allocation</td>
</tr>
<tr>
<td>SuperNet Services (max. per month per approved site)</td>
<td><strong>$560.00</strong></td>
</tr>
</tbody>
</table>

## Community Based Grants
### Community Supports Grant

<table>
<thead>
<tr>
<th>Funding</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Funding</td>
<td>$8,750.00</td>
</tr>
<tr>
<td>DSEPS Schools (WMA Rate)</td>
<td>$150.00</td>
</tr>
<tr>
<td>Other Private Schools</td>
<td>$75.00</td>
</tr>
</tbody>
</table>

### Jurisdiction Based Grants

| System Administration Rate (See Section D4) | per formula |

### H1.3 Funding Rates for Private ECS Operators

<table>
<thead>
<tr>
<th>Funding for Private ECS Operators</th>
<th>2020/21 School Year</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Base Instruction (WMA Rate)</strong></td>
<td></td>
</tr>
<tr>
<td>ECS Base Instruction</td>
<td>$3,032.00</td>
</tr>
<tr>
<td><strong>Services &amp; Supports Grants</strong></td>
<td></td>
</tr>
<tr>
<td>English as a Second Language (WMA Rate)</td>
<td>$600.00</td>
</tr>
<tr>
<td><strong>ECS Program Unit Funding (PUF)</strong></td>
<td></td>
</tr>
<tr>
<td>Code (41 to 46)</td>
<td></td>
</tr>
<tr>
<td>Half Day (Minimum of 400 Hours)</td>
<td>$15,000.00</td>
</tr>
<tr>
<td>Full Day (Minimum of 800 Hours)</td>
<td>$25,000.00</td>
</tr>
<tr>
<td>Code 47</td>
<td></td>
</tr>
<tr>
<td>Half Day (Minimum of 400 Hours)</td>
<td>$10,000.00</td>
</tr>
<tr>
<td>Full Day (Minimum of 800 Hours)</td>
<td>$17,000.00</td>
</tr>
<tr>
<td>Mild/Moderate Disabilities/Delays, Gifted and Talented (WMA Rate)</td>
<td>$2,486.76</td>
</tr>
<tr>
<td><strong>First Nations, Métis and Inuit Education</strong></td>
<td>$600.00</td>
</tr>
<tr>
<td>FNMI Student Support Self-Identified (WMA Rate)</td>
<td>$600.00</td>
</tr>
</tbody>
</table>

### School Based Grants

| Operations & Maintenance Grant (WMA Rate) | $375.00 |

---

*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.*
<table>
<thead>
<tr>
<th>Transportation Grant</th>
<th>2019/20 SY Allocation</th>
</tr>
</thead>
<tbody>
<tr>
<td>SuperNet Services (max. per month per approved site)</td>
<td>$400.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Jurisdiction Based Grants</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>System Administration Rate (See Section E4)</td>
<td>per formula</td>
</tr>
</tbody>
</table>

**H2 – Payment Schedules**

This section will appear in the final version of the Funding Manual
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**
This section will appear in the final version of the Funding Manual
J1 – New Private School Authorities, Charter School Authorities and Private ECS Operators

New private school authorities, charter school authorities 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:

<table>
<thead>
<tr>
<th>Year of operation</th>
<th>Calculation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year 1 of operation</td>
<td>100% of enrolment count on September 30 of their first school year of operation</td>
</tr>
<tr>
<td>Year 2 of operation</td>
<td>70% of Sept. 30 enrolment of Year 2 + 30% enrolment of Year 1</td>
</tr>
<tr>
<td>Year 3 of operation</td>
<td>50% of Sept. 30 enrolment of Year 3 + 30% enrolment of Year 2 + 20% enrolment of Year 1</td>
</tr>
<tr>
<td>Year 4 of operation</td>
<td>Regular WMA method – 50% of projections for Year 4 + 30% enrolment of Year 3 + 20% enrolment of Year 2</td>
</tr>
</tbody>
</table>

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.
Section K – Requirements for School Authority Planning and Results Reporting

School Authority Planning & Reporting

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 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

Planning & Reporting Cycle
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 local 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 these 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. Together, 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:

<table>
<thead>
<tr>
<th>Domain</th>
<th>Required Provincial Measure</th>
<th>Required Local Components</th>
</tr>
</thead>
</table>
| Student Growth & Achievement | • Provincial Achievement Test results  
• Diploma Exam results  
• High School Completion results  
• Survey measures of Citizenship and Academic Engagement* |                                                                                                                                                           |
<p>| Teaching &amp; Leading       | • Survey measure of Education Quality                                                                                                               | • 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        | • Survey measures of Safe &amp; Caring, Student Inclusion and Access to Supports &amp; Services.                                                            | • 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. |</p>
<table>
<thead>
<tr>
<th>Governance</th>
<th>Local &amp; Societal Context</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Survey measure of Parent Involvement</td>
<td>• 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.</td>
</tr>
<tr>
<td>• School authorities provide the amount budgeted for 2020/2021, the amount spent and the variance between these amounts for operational expense categories.</td>
<td></td>
</tr>
<tr>
<td>• 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 School Councils Regulation, section 12.</td>
<td></td>
</tr>
</tbody>
</table>

*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.

The provincial measures:
- give school authorities a consistent way to measure their progress
- help identify areas for improvement and set priorities for the future
• give school authorities a wide range of performance data
• provide a more complete view of the school system and how it can improve.

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.

School authorities are accountable for their performance in meeting their responsibilities and ensuring student growth and achievement. Education plans and AERRs are formal documents that 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. One of these processes is reviewing school authorities’ Education Plans and Annual Education Results Reports (AERRs) to ensure that they meet provincial requirements and are consistent with the Assurance Framework. As part of this, they also meet with school authority representatives to review the plans/reports and to support their continuous improvement process.

In general, Department staff review educations plans and results report 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 their previous Education Plan and the actions taken to meet their responsibilities in each domain. They have 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.
- School authorities have actively engaged their 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. They communicate and engage with stakeholders to share results and report on progress toward achieving priorities and meeting their 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 a 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;
- 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. The plan does not identify everything that the school authority does, but rather a few priorities that required focused action.

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 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:

- 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.
  - A term plan is established for a fixed three or more year 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 are expected to review their plans regularly and adjust them in light of their latest results from provincial and local measures and based on 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.

- Plans must have outcomes, performance measures, and strategies and, should address both local goals and system priorities.
  - 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:
    - 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.
• 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.

• 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:
  o describe the key insights from their results analysis that are informing their Education Plan and any adjustments made;
  o review the required provincial measures and reporting requirements and incorporate them into their plan, as they deem appropriate; and,
  o 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.

• Charter schools are required to include goals, outcomes, measures and strategies in their Education Plans related to the goals and outcomes, and measures written in their ministerial approved charter agreement.

• Alberta Education has identified it strategic direction in its 2020-2023 Business Plan. 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:
  o 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 Strategies:** School authorities are expected to actively engage stakeholders to inform the development of local priorities and plans. The planning document should:
  o Clearly indicate:
    ▪ What stakeholders were involved?
    ▪ How they were engaged?
    ▪ How their input informed local priorities?
    ▪ What subsequent actions were taken based on the input provided?
  o Draw upon a variety of sources to measure engagement and progress on local priorities, for example using the questions from the Parental Involvement measure.
  o Indicate the school board’s actions to meet its obligations under Section 12 of the School Councils Regulation to provide opportunity for school councils to be involved in developing school education plans.

• **Budget Summary:** The budget summary must include:
  • A web link to the board’s budget for 2020/2021 that shows alignment to the Education Plan;
  • **Summary of Facility and Capital Plans.** Include a web link to information on the school authority’s facility and capital plans.
  • 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 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. Taken together, the combination of standard and context-specific information, help provide a balanced and holistic account of school authority performance. This also helps demonstrate that school authorities are considering and responding to their local context.

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, however, they are not require to organize their report according the domains.
• School authorities must report the performance measure results 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:
  o Report the school authority’s results for 2019-2020.
  o Include historical or trend results/analysis, at least 3 years of data, where available.
  o For all required measures, include achievement and improvement evaluations for the overall measure, where available.
• For all measures, provide a commentary on the results to put them in context and help stakeholders understand them.
  o 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.
  o Implications for planning arising from the results analysis should be clearly identified.
  o 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.
  o 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

<table>
<thead>
<tr>
<th>Measure</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAT Acceptable/Excellence</td>
<td>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)</td>
</tr>
<tr>
<td>o Overall and specific course results for all students</td>
<td></td>
</tr>
<tr>
<td>o Overall and specific course results for self-identified First Nations, Métis and Inuit and English Second Language students</td>
<td></td>
</tr>
<tr>
<td>Diploma Exam Acceptable/Excellence</td>
<td>Overall percentage of students who achieved the acceptable standard and the percentage of students who achieved the standard of excellence on Diploma Examinations.</td>
</tr>
<tr>
<td>o Overall and specific course results for all students</td>
<td></td>
</tr>
<tr>
<td>o Overall and specific course results for self-identified First Nations, Métis and Inuit and English Second Language students</td>
<td></td>
</tr>
<tr>
<td>High School Completion</td>
<td>High school completion rate of students within three and five years of entering Grade 10.</td>
</tr>
<tr>
<td>o Overall for all students and for self-identified First Nations, Métis and Inuit and English Second Language students</td>
<td></td>
</tr>
<tr>
<td>Citizenship</td>
<td>Teacher, parent and student agreement that students model the characteristics of active citizenship.</td>
</tr>
<tr>
<td>o Overall and results for teachers, parents, and students</td>
<td></td>
</tr>
</tbody>
</table>

#### Under Development:

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

### Domain: Teaching & Leading

#### Required Provincial Measures

<table>
<thead>
<tr>
<th>Measure</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education Quality</td>
<td>Teacher, parent and student satisfaction with the overall quality of basic education.</td>
</tr>
</tbody>
</table>
Overall and results for teachers, parents, and students.

**Required Local Component**

- Processes, strategies, local measures and data to demonstrate that the school authority supports teaching and leadership quality through professional learning, supervision and evaluation processes.
  - This includes demonstrating how the school authority met its responsibility as outlined in *Teacher Growth, Supervision, and Evaluation Policy*, Section 1 (e), to provide information summarizing implementation of their local policy.

**Domain: Learning Supports**

**Required Provincial Measures**

- **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.
  - Overall and results for teachers, parents, and students.

Under Development:
- **Student Inclusion**: A measure assessing that students feel like they belong and are supported to be successful in their learning.
- **Access to Supports & Services**: A measure assessing that appropriate supports and services for students are available and can be accessed in a timely manner.

**Required Local Component**

- 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**

- **Parental Involvement**: Teacher and parent satisfaction with parental involvement in decisions about their child’s education.
  - 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**

Summary of Financial Results:

- 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.
• Indicates where more information can be obtained (e.g. contact at central office).

**Stakeholder Involvement Strategies:** Processes, strategies and local measures and 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 recommended 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

• **Note:** *Measures in italics are under development.*
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 – 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.

Minimum Instructional Hours:
- ECS – 238 hours (50%) of the instructional time using French as the language of instruction.
- Elementary – 475 hours (50%) of the instructional time using French as the language of instruction.
- Junior High – 380 hours (40%) of the instructional time using French as the language of instruction.
- Senior High – 250 hours (10 credits) per year using French as the language of instruction.
Annual Operating Deficit

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

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”.

Challenge Assessment

An assessment of a student to determine if they already possess the knowledge, skills and attitudes for a course as identified in the Programs of Study in order to receive credit and a final mark in the course.
Charter Board
The society or company that is named in a charter as being responsible for the operation for a charter school, as per section 26(3) of the Education Act.

Charter School
A school established under section 25 of the Education Act and operated per section 26 of the Education Act. The following charter schools have been approved for this school year:

- Almadina School Society (6021)
- Aurora School Ltd. (6020)
- Boyle Street Education Centre (6017)
- Calgary Arts Academy Society (0151)
- Calgary Girls’ School Society (0152)
- CAPE – Centre for Academic and Personal Excellence Institute (6019)
- Connect Charter School Society (0045)
- Foundations for the Future Charter Academy Charter School Society (0009)
- Mother Earth’s Children’s Charter School Society (0154)
- New Horizons Charter School Society (6015)
- Suzuki Charter School Society (0012)
- Valhalla School Foundation (0224)
- Westmount Charter School Society (0109)

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

<table>
<thead>
<tr>
<th>Category of ECS Children</th>
<th>*Type of ECS Funding Provided</th>
<th>*Minimum age of the child on September 1</th>
<th>*Maximum age of the child on September 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kindergarten child</td>
<td>Base Instruction Funding (Maximum of 1 year funding)</td>
<td>4 years 8 months</td>
<td>Less than 7 years</td>
</tr>
<tr>
<td>ECS child with a mild/moderate disability/delay,</td>
<td>Base Instruction Funding and Mild/Moderate (Maximum 2 years funding which includes the Kindergarten year)</td>
<td>3 years 8 months</td>
<td>Less than 6 years</td>
</tr>
<tr>
<td>Category of ECS Children</td>
<td>*Type of ECS Funding Provided</td>
<td>*Minimum age of the child on September 1</td>
<td>*Maximum age of the child on September 1</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-----------------------------</td>
<td>------------------------------------------</td>
<td>------------------------------------------</td>
</tr>
<tr>
<td>ECS child who is gifted and talented</td>
<td>Base Instruction Funding and Gifted and Talented (Maximum 2 years funding which includes the Kindergarten year)</td>
<td>3 years 8 months</td>
<td>Less than 6 years</td>
</tr>
<tr>
<td>ECS child with English as a Second Language (ESL) needs or Francisation needs</td>
<td>Base Instruction Funding (Maximum 2 years funding which includes the Kindergarten year) ESL/Francisation Funding</td>
<td>3 years 8 months</td>
<td>Less than 6 years</td>
</tr>
<tr>
<td>ECS child with severe disabilities/delay</td>
<td>Base Instruction Funding (Maximum 3 years funding which includes the Kindergarten year) and PUF (Max years see Section C2.6, E2.3)</td>
<td>2 years 8 months</td>
<td>Less than 6 years</td>
</tr>
<tr>
<td>ECS child who is developmentally immature</td>
<td>Base Instruction Funding (Maximum 2 years funding)</td>
<td>5 years 8 months</td>
<td>Less than 7 years</td>
</tr>
</tbody>
</table>

*The maximum years of funding cannot be combined. ECS operators must take into consideration the grade one school entrance age in the community when accessing the maximum years of ECS funding.

3. Is a resident of Alberta and has a parent who ordinarily resides in Alberta on the September count date;
4. Is a Canadian citizen on the September count date; or
   a. is lawfully admitted to Canada for permanent residence; or
   b. is a child of a Canadian citizen; or
   c. is a child of an individual who is lawfully admitted to Canada as a permanent or temporary resident; or
   d. is a step-child (who has been issued a study permit) of a temporary foreign worker that is in Canada on a work permit; and who is the biological or adopted child of the temporary foreign worker’s spouse or partner; or
   e. is a step-child of a Canadian citizen and is the biological or adopted child of the Canadian citizen’s non-Canadian spouse or partner. The following documentation is required:
      i. proof of application for permanent resident status and fee payment to Immigration, Refugees and Citizenship Canada (IRCC); or
      ii. valid study permit for the child.
5. For funding purposes, a First Nations child who resides on a reserve is not counted 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:

i. a student has earned a final mark of 50 per cent or greater in the course; or

ii. a student has earned a final mark of 25 per cent or greater but less than 50 per cent in the course, and has 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/delay. 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
The following DSEPS are approved for the school year, based on an approved Annual Operating Plan:

<table>
<thead>
<tr>
<th>School Authority</th>
<th>Schools</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calgary Academy Society (9131)</td>
<td>Calgary Academy (9908)</td>
</tr>
<tr>
<td>Calgary Quest Children’s Society (9795)</td>
<td>Calgary Quest School (5398)</td>
</tr>
<tr>
<td>Edmonton Academy Society for Learning Disabled (9172)</td>
<td>Edmonton Academy (7953)</td>
</tr>
<tr>
<td>Elves Special Needs Society (9263)</td>
<td>Elves Child Development Centre (0655)</td>
</tr>
<tr>
<td></td>
<td>Elves Child Development Centre (2166)</td>
</tr>
<tr>
<td>Foothills Academy Society (9107)</td>
<td>Foothills Academy (9917)</td>
</tr>
<tr>
<td>Janus Academy Society (0025)</td>
<td>Janus Academy (0032)</td>
</tr>
<tr>
<td></td>
<td>Janus Academy (Holy Cross Site) (1323)</td>
</tr>
<tr>
<td>New Heights School and Learning Services Society (0077)</td>
<td>New Heights School and Learning Services (0432)</td>
</tr>
<tr>
<td>Parkland Community Living and Supports Society (9027)</td>
<td>Parkland School Special Education (4493)</td>
</tr>
<tr>
<td>Renfrew Educational Services Society (9672)</td>
<td>Renfrew Educational Services – Janice McTighe Centre (0249)</td>
</tr>
<tr>
<td></td>
<td>Renfrew Thomas W. Buchanan Centre (0250)</td>
</tr>
<tr>
<td>Rundle College Society (9230)</td>
<td>Rundle College Academy (5297)</td>
</tr>
<tr>
<td>Third Academy International Ltd. (0023)</td>
<td>The Third Academy (0031)</td>
</tr>
<tr>
<td></td>
<td>Third Academy Calgary South (1446)</td>
</tr>
</tbody>
</table>

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 special needs.

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 and it is not family-oriented programming.

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 Program
A program operated by a Francophone Regional Authority under section 14 of the Education Act.

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

French as a Second Language (FSL)
A program or course offered under sections 17 and 19 of the Education Act.

Francophone Education
An education program offered under section 14 of the Education Act for individuals with rights under section 23 of the Canadian Charter of Rights and Freedoms to receive school instruction in French.

FTE
Full-time Equivalent.

FTE Enrolment
For the purposes of calculating WMA enrolment:
- A child counts as 0.5 FTE.
- A student counts as 1.0 FTE.
- A student completing their fourth year of high school counts as 0.5 FTE.
- A student beyond their fourth year of high school counts as 0.25 FTE.

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.

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 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.

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<thead>
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<th>School Authority</th>
<th>Schools</th>
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<td>Horizon Group Care (1055)</td>
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</table>
Institutional Students

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

- should be charged to Operations and Maintenance

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.

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.

Other Specialized Education Programs

Education programs in emergency women’s shelters, hospitals and facilities that are not licensed by Children’s Services as residential facilities.
### School Authorities Approved to Provide Other Specialized Education Program

<table>
<thead>
<tr>
<th>School Authority</th>
<th>Programs</th>
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<td>- Dr. Gordon Townsend School (9886)</td>
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<td>- Rite Trak School (7706)</td>
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<td>- PAS (6864)</td>
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<td>The Red Deer School Division (3070)</td>
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<td>- Red Deer Regional Hospital Education Program (0574)</td>
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<td>Unlimited Potential Community Services Society (9272)</td>
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<td>- Phoenix Academy (0028)</td>
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<td>- Kootenay School (4111)</td>
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<tr>
<td>The Wolf Creek School Division (0054)</td>
<td>- Wolf Creek Education Centre (4299)</td>
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</tbody>
</table>

### 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.

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.

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 C1.3. The count is finalized using the Funding Event System (FES) on the last business day of December of the respective school year.

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 students will require significant additional supports and services to deal with issues such as limited or disrupted formal schooling, traumatic events and adjusting to an unfamiliar culture.

An eligible student must provide the school authority with current documentation from Immigration, Refugee and Citizenship Canada substantiating the student’s refugee 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 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.

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.

Schools of Choice

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

School Year

For funding and financial reporting purposes, means the 12-month period from September 1 to August 31. This applies to all school authorities. See also section 139) of the Education Act, the Private School Regulation, and the Early Childhood Services Regulation.

September Count Date

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

An individual who meets conditions 1, 2, 3, and 4, unless 5, 6 or 7 apply, 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.
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 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.

Student who is Gifted/Talented

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

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.
Section M – Accountability Statements for Education Plans

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 N – Grant Indices

N1.1 Socioeconomic Status Index

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4 The Northland School Division is provided a supplemental allocation to address the unique socioeconomic context of the school division.
The Wetaskiwin School Division | 9.24
The Wild Rose School Division | 4.70
The Wolf Creek School Division | 5.78
Valhalla School Foundation | 8.20
Westmount Charter School Society | 1.00

### N1.2 Geographic Indices

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<tr>
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<tr>
<td></td>
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</tr>
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</tr>
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<td>The Rocky View School Division</td>
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<td>The St. Albert School Division</td>
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</tbody>
</table>
N1.4 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:

<table>
<thead>
<tr>
<th>School Jurisdiction</th>
<th>School</th>
<th>Community</th>
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