

PURPOSE

This Manual will assist **school jurisdictions**, charter schools, **private ECS operators**, and **private schools** in accessing education funding from the province of Alberta.

School authorities should know and clearly understand the “General Conditions That Apply to Funding” listed in the Introduction to this Manual. These conditions have general applications and are used by Alberta Learning in determining the amount of funding and the system of payment.

PARTS OF THE MANUAL

Part 1 of the Manual applies only to **school jurisdictions**. The first section “Framework for Funding School Boards” provides an overview of the funding plan for **school jurisdictions** announced on February 1, 1995.

The sections entitled Instruction Block, Support Block and Capital Block outline the various types of funding that are available to **school jurisdictions**.

Part 2 and Part 4 outline the funding that is available to **school jurisdictions**, **private ECS operators**, and **funded private schools** that provide **Early Childhood Services programs** to **children**, and French language programs to students.

Part 3 applies only to **funded private schools** accredited by the **Minister**. These **schools** may be eligible to receive funding for basic instruction, students with severe disabilities, resident students of the government, home education, learning resources, and early literacy programs.

Part 5 outlines the funding available to **charter schools** approved by the **Minister**. Except for capital, funding for **charter schools** is the same as for **school jurisdictions**.

Part 6 outlines specific types of funding available to all school authorities. This includes funding for the Alberta Initiative for School Improvement, Teacher Salary Enhancement, and Supernet access.

Part 7 outlines specific types of inter-ministerial funding available for school authorities. This includes Student Health funding and Debt Retirement.

Part 8 describes the payment schedule and funding rates used by Alberta Learning to allocate funding to each type of **school authority**. Payment schedules and funding rates are provided for **school jurisdictions**, **private ECS operators** and **funded private schools**.

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

FUNDING FORMAT

For ease of use, the following format is used throughout the Manual to describe each type of funding that may be available to school authorities:

- PURPOSE - a short statement describing why the funding is provided.
- CONDITIONS - the circumstances under which the funding is provided.
- REQUIREMENTS - what school authorities must do to acquire funding.
- CONSIDERATIONS - other information that might be useful to school authorities, e.g., how the amount of funding is calculated.

INFORMATION REQUIRED FOR FUNDING

Many types of funding are provided on the basis of student information the **school authority** has reported directly to Learning Information Exchange Services. Some funding will be dependent upon the **school authority** submitting a form to School Finance. All forms referred to in the manual are in the Forms section of the Funding Manual.

CONTACT ALBERTA LEARNING FOR ASSISTANCE

While Alberta Learning has made every effort to make the Manual clear and understandable, **school authorities** may require further information. For assistance from Alberta Learning, please refer to the following list of contacts and dial 310-0000 (for callers outside of Edmonton) then dial the area code and number of the person you are calling:

BRANCH	PHONE #	CONTACT
School Finance	780-427-2055	Mark Lalumiere Ken Poon Penny Clark
School Reporting	780-427-7235	Dale Fulford Wayne Braun
Budgets and Fiscal Analysis	780-427-2055	Gene Williams
Special Programs	780-422-6326	Rick Hayes Pat Cox
Learning Information Exchange Services	780-427-1111	Joe Reff

Field Services		
Zone 1	780-427-5394	Merla Bolender
Zone 2 and 3	780-427-9296	Carol McLean
Zone 4	780-427-5381	Loraine Steele
Zone 5	780-415-9312	Ken Robertson
Zone 6	780-427-5377	Michael Walter
French Language Services	780-427-2940	Gerard Bissonnette
Aboriginal Services	780-415-9300	Evelyn Good Striker
Governance and Program Delivery	780-427-7235	Valerie Keates
School Improvement	780-427-3160	Dick Meanwell
Alberta Infrastructure- Learning and Housing Facilities	780-422-0768 780-422-0623 780-297-4563	NORTH – Larry Wilson CENTRAL – Doug Ramsey SOUTH – Barry Day

These individuals may be contacted by e-mail by writing their first name, (.) dot, last name followed by @gov.ab.ca, (e.g., Penny.Clark@gov.ab.ca).

This Manual explains what funding is available to **school authorities** and how it can be obtained. The information in this Manual is not intended as a substitute for the Provincial statutes or regulations or for specific instructions or explanatory material issued by various branches of Alberta Learning.

Payment of funds is subject to the conditions and requirements specified in each section. General terms and conditions are listed below. The Manual user should become familiar with the conditions and requirements and ensure that they are met.

1. Unless otherwise specified, funding is for the current school year using the payment schedule and funding rates indicated in Part 8.
2. The **Minister** may determine the funding amount and the method by which that amount is determined. This determination may include a reduction in funding where a strike or lockout leads to cessation of services by teachers or other employees of a **school jurisdiction, charter school, or private ECS operator**.
3. Funding is provided to **school authorities** on the condition that government legislation, policy, and regulations are followed, and program goals and objectives specified by Alberta Learning are met, including:
 - a) courses of study, education programs, amount of instruction time, instructional materials, and goals and standards prescribed, authorized, approved, or ordered by the **Minister** under Section 25(1) of the *School Act*;
 - b) access to special education programs for students in need of special education as stated in Section 29 of the *School Act*; and
 - c) requirements for funding contained in this Manual.
4. **School jurisdictions, charter schools, private ECS operators or funded private schools** applying for funding shall keep on file the documents and invoices required to support their claim for each type of program funding described in this Manual, **and** the following information:
 - a) an eligible enrolment count as of September 30 of the current school year or if September 30 is not a **school** day, the enrolment count for the last **school** day in September;
 - b) copies of current education or **transportation agreements**;
 - c) a record of the daily attendance of each enrolled student;

- d) where attendance records are on computer, a hard (paper) copy of the daily attendance records of each enrolled student as of September 30, signed and dated by the principal or designate;
 - e) where attendance records for high school students are on computer, a paper copy of the time table for each student as of September 30; and
 - f) a list of **schools**, teachers and administrators involved in each program.
5. Alberta Learning shall reserve the right to request and review documentation to substantiate a claim for funding.
6. An adjustment may be made in a payment when an audit or monitoring by Alberta Learning indicates that:
- a) a **school authority** has received funding to which it was not entitled;
 - b) a **school authority** has not received funding to which it is entitled; or
 - c) a **school jurisdiction** has not complied with one or more of the “Limited Conditions of the Funding Framework” listed in “Framework for Funding School Boards” of this Manual.
7. Where an overpayment or an underpayment occurs, the **Minister** may authorize an adjustment in subsequent payments to the **school authority**.
8. When the Audited Financial Statements of a **school jurisdiction** indicate that a **board** has not complied with the “Limited Conditions of the Funding Framework” Alberta Learning will deduct from the **board’s** general revenue allocation, the amount by which the **board’s** expenditure exceeded the condition(s). This amount will be deducted from the payment that is made to the **school jurisdiction** immediately following certification of the **board’s** non-compliance with the condition(s).
9. Payments in January, and subsequent payments shall be withheld from **private ECS operators** and **funded private schools** if the Audited Financial Statements or the Budget Report have not been submitted to School Reporting by the due date. When both forms have been submitted, payments will be released.
10. Payments may be withheld from **school jurisdictions, charter schools** and **funded private schools** that are late in submitting: the Audited Financial Statements, Budget Report, School Board Three-Year Education Plan, Annual Performance Report, or any other information requested or required by the **Minister** by the dates specified in the *School Act* and by Alberta Learning. Payments will be re-instated when the required information has been received by Alberta Learning.

11. **School jurisdictions, charter schools, private ECS operators and funded private schools** must develop, keep current, and implement written policies and procedures which are consistent with policies in sections 1 and 2 of the Policy, Regulations and Forms Manual.
12. **Early Childhood Services operators** who have received funding from Alberta Learning to provide an **ECS program** and have decided to cease operation may be required to return a portion of their operating surplus to the Provincial Treasurer.
13. The **Minister** may fund a **board**, other person, or organization for purposes related to the education of **children** in **Early Childhood Services Programs**, or students in **school** programs that are in addition to the funding provisions of this Manual.
14. A **school jurisdiction** or a **charter school** incurring a deficit because of unforeseen costs may borrow to meet current expenditures, without the permission of the Minister, if the total amount to be borrowed plus any amount owing under previous borrowings does not exceed the amount of the **school jurisdiction's** or **charter school's** accounts receivable as shown on its most recent Audited Financial Statement. If greater than the accounts receivable, the Minister's permission is required. Section 167(1), *School Act*

A **school jurisdiction** or **charter school** which fails to balance its budget or develop a plan to recover its deficit over a period of three years, may be subject to an inquiry under Section 25.2 of the *School Act* and to the appointment of an official trustee under Section 25.3 to conduct the affairs of the **school jurisdiction** or **charter school**.

FUNDING MANUAL
FOR
SCHOOL
AUTHORITIES

INTRODUCTION
SUMMARY OF FUNDING APPLICATION FORMS

FORM NO.	FUNDING APPLICATION FORM	SENT OUT	BY	DUE BACK	TO
01AL1.A.1a	Junior High Courses taken by Senior High Students	August	SF	Upon Completion of Term/Course	SF
01AL1.A.1b	Report on Funded Students Attending First Nation Schools	August	SF	April 30	SF
01AL1.A.1c	Add, Modify, Delete form for Enrolments	August	SF	*	SF
01AL1.A.1.1	Form 21 Notice of Intent to Operate Outreach Programs		SP	May 31	SP
01AL1.A.4	Application for Enhanced Opportunity Projects	May	SF	July 30	SF
01AL1.A.5	Native Education Project – Letter of Intent	January	AS	April 1	AS
01AL1.A.6	Institutional Program – Budget - Final	August	SF	April 15 October 15	SF
01AL1.A.13a	Report of Jr. and Sr. High Home Education Students	August	SF	December 15 July 15	SF
01AL1.A.13b	Report of Additional ADLC Course Costs for Grades 1 to 6	August	SF	**	SF
01AL1.A.14	French First Language Upgrading	August	SF	December 15	SF
	Application for Rural Transportation	Electronic Submission	SF	November 30	SF
	Application Form Special Transportation and Boarding		SF	November 30	SF
	Application Form Urban Transportation		SF	November 30	SF
01AL2.4	Program Enhancement Project	May	SF	June 30	SF
01AL2.5a	2000/2001 Program Unit Funding Application	August	SF	February 1	SF
01AL2.5b	ECS Summary of Actual PUF Expenditures	June	SF	September 22	SF
01AL2.6	ECS Transportation	August	SF	November 30	SF
01AL3.1a	Private Schools - Report of Purchased ADLC Courses	August	SF	Upon completion of term/course	SF
01AL3.1b	Private Schools - Junior High courses taken by Senior High Students	August	SF	Upon completion of term/course	SF
01AL6.4a	Regional Consortium Statement of Revenue and Expenses	July	SF	November 30	SF
01AL6.4b	Regional Consortium Statement of Financial Position				
01AL7.2	Capital Loans Form	August	SF	October 22	SF

*After receiving your First RACERS data.

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

IMPORTANT CUT-OFF DATES - 2001/2002 SCHOOL YEAR

	<u>DEADLINE</u>
Modifications to Enrolment and Transportation Information to School Finance	April 30, 2002
Enrolment Turnaround Reports to School Finance	May 31, 2002
CEU Modifications to Course/Marks Unit of LIES	
First Semester	June 30, 2002
First and Second Quarter	June 30, 2002
Remaining Terms of the School Year	November 15, 2002
CEU Turnaround Reports to School Finance	
First Semester	July 31, 2002
First and Second Quarter	July 31, 2002
Remaining Terms of the School Year	December 22, 2002

LEGEND: AS = Aboriginal Services LIES = Learning Information Exchange Services
SP = Special Programs SF = School Finance

DOCUMENTS:

“Advisory Manual on Early Childhood Service for the Incorporated Non-Profit Society or Private School (1996)”

“Policy, Regulations and Forms Manual” - from the Alberta Learning website
To access the Manual, click on *ECS to Grade 12 Education* then under *What’s New*, click on *Policy Manual Updates*.

The documents listed below are available from:

Alberta Learning
11160 – Jasper Ave.
EDMONTON, Alberta
T5K 0L2

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|----------------------------------------------------------|------------|---------------------------------------------------------------------------------------|
| “Charter School Handbook” | - contact: | Special Programs Branch
(780) 422-6326 |
| “Kindergarten Program Statement | - contact: | Curriculum Branch
Jenny Bushrod (780-422-0624)
(780) 427-2984 |
| “Native Education in Alberta Schools (1987)” | - contact: | Aboriginal Services Branch
(780) 415-9300 |
| “ECS Program Unit Funding: A Handbook for ECS Operators” | - contact: | Special Programs Branch
(780) 422-6326 |
| “Special Education Funding: A Handbook of Guidelines” | - contact: | Special Programs Branch
(780) 422-6326 |
| “Student Health Partnership Planning Guide” | - contact: | Special Programs Branch
(780) 422-6326 |
| “School Capital Funding Manual” | - contact: | Alberta Infrastructure
Learning and Housing
Facilities Branch
(780) 427-7924 |

For copies of "Alberta Statutes" referenced in this manual, contact:

Queen's Printer Bookstore
Main Floor, Park Plaza
10611 – 98 Avenue
EDMONTON, Alberta
T5K 2P7
(780) 427-4952

OR

Queen's Printer Bookstore
Main Floor, McDougall Centre
445 – 6 St. S.W.
Calgary, Alberta
T2P 4E8
(403) 297-6251

OR

For on-line access to the Statutes use <<http://www.gov.ab.ca.qp>>

Any out of town callers please dial (310-0000) to be connected toll free to any of the above numbers.