

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.

Revised The sections entitled Instruction Block, Support Block and Capital Block outline the various types of funding that are available to **school jurisdictions**. Capital Block funding and Plant Operation and Maintenance funding are now the responsibility of Alberta Infrastructure.

Revised Part 2 outlines the funding that is available to **school jurisdictions, private ECS operators, and funded private schools** that provide **Early Childhood Services programs to children**.

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 4 outlines funding provided by the federal government that is available to **school jurisdictions, private schools, and private ECS operators** for the provision of French language programs to children and students in ECS to Grade 12.

Part 5 outlines the funding available to **charter schools** approved by the **Minister**. With the exception of Capital funding, funding provided to **charter schools** is the same as to **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 what the funding is for.
- CONDITIONS - the conditions under which the funding is provided.
- REQUIREMENTS - what school authorities must do to receive funding.
- CONSIDERATIONS - other information that might be useful to school authorities, i.e., 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 Learner Records & Data Exchange. 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.

Revised

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. To contact Alberta Learning, please refer to the following list of contacts. For calls outside of Edmonton, dial 310-0000 then dial the area code and number of the person you are calling:

BRANCH	PHONE #	CONTACT
School Finance	780-427-2055 780-427-2147 (FAX)	Kenneth Poon Jeff Willan Mark Lalumiere
School Reporting	780-415-8940	Dale Fulford Wayne Braun
Budget and Fiscal Analysis	780-427-2055	Gene Williams

BRANCH	PHONE #	CONTACT
Special Programs	780-422-6326	Rick Hayes
Information Exchange Services (IES)	780-427-1111	IES Help Desk
Field Services		
Zone 1	780-427-5394	Niki Wosnack
Zone 2 and 3	780-427-9296	Michael Walter
Zone 4	780-427-5381	Loraine Steele
Zone 5	780-415-9312	Merla Bolender
Zone 6	780-427-5377	David Woloshyn
French Language Services	780-427-2940	Gerard Bissonnette
Aboriginal Services	780-415-9300	Morris Manyfingers
Governance and Program Delivery	780-427-7235	Valerie Keates
School Improvement	780-427-3160	Terry Wendel
Alberta Infrastructure-Learning Facilities Branch	780-422-0768 780-422-0623 403-297-4563 780-427-2167	NORTH – Larry Wilson CENTRAL – Doug Ramsey SOUTH – Vacant FUNDING –Hillary Rose

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

New

The 2002-2003 Funding Manual for School Authorities is available for viewing and printing on Alberta Learning's website at <http://ednet.edc.gov.ab.ca/funding/FundingManual/>

New

Funding application forms should be submitted to the School Finance Branch at:

Alberta Learning
School Finance Branch
8th Floor, Commerce Place
10155 - 102 Street
Edmonton, Alberta
T5J 4L5

This Manual explains the funding 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 39(1) of the *School Act*;
 - b) access to special education programs for students in need of special education as stated in Section 47 of the *School Act*; and
 - c) conditions and 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 timetable 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 Education Results Report (AERR), 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 that 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 Minister of Finance.
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. All borrowings for capital expenditures by a **school jurisdiction** or **charter school**, and all borrowings for operating expenses by a **school jurisdiction** or **charter school** to the extent they exceed the account receivable balance as shown in the most recent audited financial statements, require the prior approval of the Minister. Section 183(1) & 183(2), *School Act*

Revised

A budgeted annual deficit for an upcoming school year is acceptable if, and only if, sufficient accumulated operating surplus is available to cover the planned shortfall without impairing the long-term financial health of the **school jurisdiction** or **charter school**. A school jurisdiction or charter school, failing to submit an acceptable budget is expected to provide a written commitment that any accumulated operating deficit actually realized will be eliminated over a period not to exceed three years, and may be subject to an inquiry under Section 41(1) of the *School Act* and to the appointment of an official trustee under Section 42(1) to conduct the affairs of the school jurisdiction or charter school.

A **school jurisdiction** or **charter school** incurring an accumulated operating deficit is expected to submit an accumulated operating deficit elimination plan. This plan will be closely monitored. A school jurisdiction or charter school which fails to eliminate its accumulated deficit over a period of three years, may be subject to an inquiry under Section 41(1) of the *School Act* and to the appointment of an official trustee under Section 42(1) to conduct the affairs of the **school jurisdiction** or **charter school**.

Revised 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 Avenue
Edmonton, Alberta
T5K 0L2

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|--|------------|---|
| “Charter School Handbook” | - contact: | Special Programs Branch
(780) 422-6326 |
| “Kindergarten Program Statement” | - contact: | Curriculum Branch
(780) 427-2984
(780) 422-0624 Jenny Bushrod |
| “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 |
| “Student Health Partnership Planning Guide” | - contact: | Alberta Children and Youth Initiative
(780) 422-9423 |
| “School Capital Funding Manual” | - contact: | Alberta Infrastructure Learning Facilities Branch
(780) 427-7924 |

First Nations, Metis, and Inuit
Education Program Guide

contact

Aboriginal Services Branch
(780) 415-9300

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 Street S.W.
Calgary, Alberta
T2P 4E8
(403) 297-6251

OR

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

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