

ALLOCATION FORMULA

1. The total allocation for Basic Instruction is the aggregate of a), b), and c) and calculated as follows. Up to 60 CEUs, including CEUs completed in Integrated Occupational Programs and regular programs, will be funded for each grade 11 and 12 **funded student** for a school year.

a) Basic Instruction – Grades 1 – 12:

$$\begin{aligned}
 \text{Basic Instruction Allocation} &= \left[\text{Number of } \mathbf{funded} \text{ students in gr. 1 - 9} \times \text{Funding Rate} \right] + \\
 &\left[\text{Number of } \mathbf{funded} \text{ students in grade 10 (except IOP) completing 31 or more credits Sept. – June (includes regular day, weekend, and evening courses)} \times \text{Rate per } \mathbf{funded} \text{ student (full-time program)} \right] + \\
 &\left[\text{Number of } \mathbf{funded} \text{ students in grade 10 (except IOP) completing less than 31 credits Sept. – June (includes regular day, weekend, and evening courses)} \times \text{Rate per } \mathbf{funded} \text{ student (partial program)} \right] + \\
 &\left[\text{Number of CEUs completed by } \mathbf{funded} \text{ students in gr. 11 – 12 (includes regular day, weekend, evening and summer courses)} \times \text{CEU Funding rate} \right] + \\
 &\left[\text{Number of } \mathbf{students} \text{ with special needs 15 years of age or older on September 1 – grade 10} \times \text{Rate per } \mathbf{funded} \text{ student (Gr. 10 full-time program)} \right] + \\
 &\left[\text{Number of } \mathbf{students} \text{ with special needs 15 years of age or older on September 1 – grades 11 and 12} \times \left[35 \text{ CEUs} \times \text{CEU Funding rate} \right] \right]
 \end{aligned}$$

b) Summer Courses – Grade 10:

$$\text{Summer Course Allocation (Grade 10)} = \left[\text{Number of CEUs completed by } \mathbf{funded} \text{ students in grade 10} \times \text{CEU Funding Rate} \right]$$

c) Students in Integrated Occupational Programs (IOP):

$$\text{IOP Allocation} = \left[\begin{array}{l} \text{Number of IOP funded students} \\ \text{in grade 10 completing 31 or more} \\ \text{credits* (Sept. – June)} \end{array} \times \begin{array}{l} \text{Rate per IOP funded} \\ \text{student (full-time program)} \end{array} \right] + \left[\begin{array}{l} \text{Number of IOP funded students in} \\ \text{grade 10 completing less than 31} \\ \text{credits* (Sept. – June)} \end{array} \times \begin{array}{l} \text{Rate per IOP funded} \\ \text{student (partial program)} \end{array} \right] +$$

*Calculated at 5/3 times each credit completed

$$\left[\begin{array}{l} \text{Number of IOP CEUs completed by} \\ \text{funded students in grades 11 and} \\ \text{12 for the school year} \end{array} \times \begin{array}{l} \text{Funding rate per} \\ \text{IOP CEU} \\ \text{(5/3 x CEU rate)} \end{array} \right]$$

- i) To be eligible for IOP funding, at least 50 percent of a grade 10 IOP student's total credits completed must be comprised of approved IOP credits.
i.e., For a student who completes 20 credits (no 5/3 adjustment), 10 or more credits must be approved IOP course credits for that student to be defined as an IOP student for funding purposes.
- ii) For **funded students** in grade 10, IOP course credits will be counted towards a full-time or partial program basis at 5/3 times each credit completed.
- iii) **Funded students** in grades 11 and 12 taking IOP courses will continue to be funded on a CEU basis.

ALLOCATION CRITERIA

1. Basic instruction funds are provided to a **school jurisdiction** for each **funded student** in grades 1 to 12.
- Revised 2. All individuals who are at least 6 years of age but less than 20 years old on September 1 may be eligible for this funding. See definition of **funded student** in the Glossary of Terms.
- Revised 3. All individuals aged 5 years and 6 months or greater, but less than 6 years old on September 1 are counted as **funded students** if they are eligible to enter grade 1 under the **school** entrance policy of a **school jurisdiction**. See definition of **child** and **funded student** in the Glossary of Terms for exceptions.
4. Under no circumstances can an individual be counted as both a **funded student** and as a **child** in the same school year.
5. An individual who is eligible to proceed to grade 1 and is less than 7 years old on September 1 who has been assessed as **developmentally immature** and whose

program plan involves both ECS and grade 1 instruction may be counted either as a **child** or as a **funded student**.

6. For students in grades 1 to 10, funding provided is based on enrolments as of September 30.

7. **Course Completions for Students in Grades 10 to 12**

Revised Basic instruction funding for senior high school students is provided based on the principle that instructional services are provided and courses are completed. Instructional services must be timetabled for both students and teachers.

New The Board Chairman, Superintendent and Secretary-Treasurer of the **school jurisdiction** are required to sign the following Declaration of Management:

We certify that the Credit Enrolment Units (CEUs) submitted by the jurisdiction are complete, accurate and do not contravene, either directly or indirectly, the funding guidelines for CEU funding as outlined in the *Funding Manual for School Authorities* provided by Alberta Learning. As the political, educational and financial leaders, we support the education practices of the jurisdiction and affirm that the policies of the jurisdiction are in alignment with the intent of education funding to provide a quality education that best meets the needs of students.

This declaration will be included in RACERS and should be printed, signed and submitted to School Finance. The declaration will be considered part of the accountability of school boards in reporting CEUs for funding purposes.

All course completions claimed for funding must meet the general conditions of funding as outlined in the Introduction section of this manual. Additionally, the conditions that all courses must meet are the following:

a) A regular course (non-CTS) is considered completed for funding purposes when:

- i) a student has earned a mark of 50% or better in the course; or
- ii) a student has:
 1. earned a final mark of at least 25% (but less than 50%) in the course, and
 2. has attended at least 50% of the classes in the course or has worked on and been assessed for at least 50% of the course content.

For diploma examination courses condition 7(a) only applies to the school-awarded portion of the mark.

b) For regular courses delivered to students on-line or by distance learning the attendance funding criteria may not apply. Funding will be provided if the student has:

- i) earned a mark of 50% or better in the course, or
- ii) earned a final mark of 25 % or greater in the course and has worked on and been assessed for at least 50% of the course content.

Revised c) For all regular courses (non-CTS), **schools** must maintain course outlines, detailed assessment records of student work in the course, records of student withdrawal, student attendance, and final marks. Also see Procedures, Documentation and Reporting in this section for more details.

Revised d) A one credit CTS course is considered completed for funding purposes when a student has worked on and been assessed for at least 50% of the course content.

e) Funding will not be provided for an incomplete CTS course if the prerequisite(s) was not completed in the same term or a prior term.

f) For all CTS courses, **schools** must maintain course outlines and detailed assessment records of student work in the course. Also see Procedures, Documentation and Reporting in this section for more details.

g) Basic instruction funding will be provided for **funded students** in grades 10 (full-time program funding), and grades 11 or 12 who attend **school** in another province with which the **school jurisdiction** has an agreement under Section 62 (2)(a)(iii) of the *School Act*.

h) Course Completion Status:

- Revised**
- A “complete” (COM) status should be used when a student finishes a regular course or when a student successfully completes a CTS course. A course completion status of COM may be used for all courses.
 - A “withdrawal” (WDR) status should be used when a student chooses not to complete a course and the **school** agrees to remove the student from the course. When a completion status of WDR is used, the course will not appear on a student’s transcript. A course completion status of WDR may be used for all courses.
 - An “incomplete” (INC) status should be used when a student does not withdraw from a CTS course yet does not demonstrate mastery of all the learner expectations identified in the Program of Study. An incomplete status has no associated mark(s). A course completion status of INC may only be used for CTS courses.
 - When a course is reported as eligible for funding, all funding conditions must be met and all supporting documentation maintained, regardless of the completion status reported.

8. Funding for Funded Students in Grade 10

Basic instruction funding for grade 10 students is based on the following:

- a) Grade 10 students (excluding IOP) taking a full-time program will be funded at \$5,097 per student. A full-time program is determined to be 31 or more credits earned during September to June of the grade 10 school year.
- b) Grade 10 students (excluding IOP) taking a partial program will be funded at \$2,548.50 per student. A partial program is determined to be less than 31 credits earned during September to June of the grade 10 school year.
- c) Funding is provided to the **school authority** where the **funded student** was enrolled on September 30. If a **funded student** is enrolled in two or more **school authorities** on September 30, the priority **school authority** will receive the applicable funding (i.e., full-time program or partial program). See Section 7.1 for Priority School Authority Conflict resolution details.
- d) If a grade 10 **funded student** transfers to another **school authority** after the September 30 **count date**, and if the student did not earn any credits with the first **school authority**, the second **school authority** will receive the applicable funding (i.e., full-time program or partial program).
- e) All grade 10 course credits earned with the priority **school authority** from September to June, where instruction is provided, and including those earned during regular **school** hours, weekends or evenings, provided through **schools** off-**school** site instruction, **outreach programs**, and Alberta Distance Learning (ADL) courses, will be counted towards a full-time or partial program for funding purposes.
- f) For summer **school** course credits, which start and end during July and August, funding will be based on Credit Enrolment Units (CEUs). If a student completes grade 9 in June of a school year and takes a grade 10 course(s) in the following summer months, the courses will be paid for on a CEU basis and the credits will not count towards a full time or partial program for the September to June grade 10 school year. The student taking the grade 10 summer course(s) must enter grade 10 in the September following the grade 9 year. If the student does not enroll in grade 10 in September, the CEU funding for the summer courses will be withdrawn.
- g) Full-time program funding of \$5,097 is provided for grade 10 **students with special needs** who are 15 years of age or older on September 1. This funding is also provided for students in **outreach programs** who are coded as having special needs.
- h) Grade 10 **funded students** enrolled in at least one of the following English as a Second Language (ESL) courses: ESL 1120, 1121, 1122, 1123, or 1125, will be funded at 17.5 credits per student per semester (\$2,548.50) or 35 credits per

student for a full year (\$5,097). The credits earned in another semester during the grade 10 school year will be added to the 17.5 credits for the ESL semester. If the credits for the two semesters total 31 or more, full-time program funding of \$5,097 will be provided.

- i) When two **french as a second language (FSL)** courses are taken in grade 10 in the same term, only one course will be counted for credit to determine full-time or partial program eligibility.
- j) Full-time program funding is provided for grade 10 **funded students** enrolled in approved Institutional programs (Code 550) on September 30.
- k) Full-time program funding is provided for Alberta grade 10 **funded students** who are on a **reciprocal exchange program** approved by Alberta Learning.
- l) Full-time program funding is provided for Alberta grade 10 **funded students** enrolled with a Lloydminster school division on September 30.
- m) Credits must be submitted to Alberta Learning for the school year in which they were earned (i.e., credits earned in one year cannot be claimed in another year).
- n) Credits granted through **challenge assessments** for grade 10 students will not be counted towards a full-time or partial program for funding purposes.
- o) Integrated Occupational Program (IOP) course credits will be counted towards a full time or partial program at 5/3 times each credit completed.
- p) Credits earned for senior high courses provided during weekends and evenings will be counted towards a full-time or partial program for funding purposes.
- q) Credits earned for Registered Apprenticeship Program (RAP), Work Experience, Special Projects and other credit courses involving substantial off-campus instruction will be counted towards a full-time or partial program for funding purposes.
- r) Credits earned for repeated grade 10 courses will be counted towards a full-time or partial program for funding purposes as long as instruction is provided in accordance with the same requirements as the first time the course was taken. Credits for repeated courses taken, where the student previously received a mark of 100 percent in the course, will not be counted for funding purposes.
- s) Credits earned for locally developed senior high school credit courses, where instruction is provided will be counted towards a full-time or partial program for funding purposes.
- t) Credits earned for credit-bearing religious education courses, where instruction is provided will be counted towards a full-time or partial program for funding purposes.

- u) Credits earned for Special Projects 10 - 20 - 30 courses will be counted towards a full-time or partial program for funding purposes.
- v) Funding is provided on a full-time or partial program basis for students in grade 10 who take full year junior high courses; 5 credits will be counted for each course completed (form 03AL1.2a) towards a full-time or partial program for funding purposes.
- w) Credits in ADL courses paid by a **school jurisdiction**, for students whose marks are reported by the ADLC, will be counted towards a full-time or partial program for funding purposes.
- x) Credits earned by a grade 10 student who enrolls in a **school jurisdiction** after the September 30 **count date**, if the student was not enrolled in any **school authority** in Alberta on or before September 30, will be counted towards a full-time or partial program for funding purposes.

9. **Funding for Funded Students in Grades 11 and 12**

Basic instruction funding for students in grades 11 and 12 is based on the following:

- a) Funding is provided on a credit enrolment unit (CEU) basis for senior high school courses completed during regular daytime hours, weekends, evenings and the summer months, with a maximum of 60 CEUs funded per student per school year (September to August). For senior high school courses with a credit value of 3, funding is based on 2.5 CEUs. For courses with a credit value of 5, funding is based on 5 CEUs. For courses with a credit value of 1, funding is based on 1 CEU.
- b) Funding is provided for credits in senior high school courses completed during weekends, evenings, and the summer months.
- c) Funding is provided for credits in Alberta Distance Learning (ADL) courses paid by a **school jurisdiction** for students whose marks are reported by the ADLC.
- d) Funding is provided for RAP, Work Experience, Special Projects and other credit courses involving substantial off-campus instruction;
- e) Funding is provided for repeated courses as long as instruction is provided in accordance with the same requirements as the first time the course was taken. Funding is not provided for students repeating courses where they previously received a mark of 100 percent in the course.
- f) Funding is provided for high school credit courses completed that may not otherwise be counted towards a high school diploma (e.g. ESL 1125);
- g) Funding is provided for credits earned through locally developed senior high school credit courses, where instruction is provided;

- h) Funding is provided for credit-bearing religious education courses, where instruction is provided;
- i) Funding is provided for credits in Special Projects 10 - 20 - 30 courses;
- j) Funding is provided for students in senior high school who take full year junior high courses; the equivalent of 5 credits will be funded for each course completed (form 03AL1.2a);
- k) For **students with special needs** who are 15 years of age or older on September 1 and classified as senior high students, funding is provided based on 35 CEUs. This funding is also provided for students in **outreach programs** who are coded as having special needs.
- l) Integrated Occupational Program (IOP) course credits will be counted at 5/3 times the regular CEU rate for each credit completed;
- m) Students registered on September 30 and enrolled in at least one of the following ESL courses: ESL 1120, 1121, 1122, 1123 or 1125, will be funded at the rate of 17.5 CEUs per student per semester or 35 CEUs for a full year. No additional funding is provided for other courses completed;
- n) Funding is provided for credits granted through **challenge assessments** at 20 percent of the CEU value for the courses challenged;
- o) When two French as a Second Language courses are taken in the same term; only credit for one course will be funded;
- p) Funding based on 35 CEUs is provided for senior high school students enrolled in Institutional programs (Code 550) on September 30;
- q) Funding is provided for courses that are completed but failed by students, on the basis of the number of credits for which the courses were taken;
- r) For grades 11 and 12, when a student transfers from one high school to a high school in another **school authority** during a term in which a course is offered, the **school authority** that provided the majority of instructional minutes will receive the funding from Alberta Learning.
- s) Funding based on the Basic Instruction rate is provided for each Alberta **funded student** who is on a **reciprocal exchange program** approved by Alberta Learning; and
- t) Funding based on the Basic Instruction rate is provided for Alberta **funded students** enrolled with a Lloydminster school division high school on Sept. 30.

10. Funding for Students in Integrated Occupational Programs (IOP)

- a) To recognize the extra costs of providing an IOP, the following funding is provided for those grade 10 **funded students** who are eligible IOP students:
- \$6,120 per funded IOP student in a full-time program. A full-time program is determined to be 31 or more credits completed during September to June of the grade 10 school year.
 - \$3,060 per funded IOP student in a partial program. A partial program is determined to be less than 31 credits completed during September to June of the grade 10 school year.
- b) To be eligible for IOP funding, at least 50 percent of a grade 10 IOP student's total credits earned must be comprised of approved IOP credits.
i.e., For a student who completes 20 credits (no 5/3 adjustment), at least 10 or more credits must be approved IOP course credits for that student to be defined as an IOP student for funding purposes.
- c) For **funded students** in grade 10, IOP course credits will be counted towards a full time or partial program basis at 5/3 times each credit completed.
- d) Students in grades 11 and 12 taking IOP courses will continue to be funded on a CEU basis.

11. Payment Not Provided for Funded Students in Grades 10 to 12

Basic instruction funding for students in grades 10 to 12 is **not** provided for:

- a) waived or retroactive credits;
 - b) maturity credits;
 - c) courses completed by non-resident students and **First Nations students**;
 - d) high school credits taken by junior high school students (except for summer courses); this includes CTS courses completed by students in junior high school and Heritage Language high school credit courses;
 - e) post-secondary courses, including those that have been approved as locally developed courses;
 - f) credits granted through evaluation of out-of-province courses; or
 - g) extra-curricular or co-curricular activities, such as competing on an athletic team.
12. When a **student** meets the criteria of a **funded student** and is attending a **school** in Canada that is providing both an academic and an **activity program**, and a comparable program is not available in Alberta, and the **student** has been selected by **audition** to be part of the program he or she may be funded depending on individual circumstances. The **resident board** is required to have an approved tuition agreement under section 62(2) of the *School Act*. The tuition agreement must be

approved by the **Minister** and should be submitted to the Assistant Deputy Minister of Corporate Services. Once a tuition agreement is approved, students are eligible for funding under this section only.

PROCEDURES, DOCUMENTATION AND REPORTING

1. Basic instruction funding is based on:
 - a) Student registration information in grades 1 to 10 as of September 30 that is submitted to Information Services by October 3;
 - b) Course completion information for students in grades 10 to 12 as follows:
 - i) Student Information System for specific enrolment;
 - ii) Student Records System / Course Information Database System (CIDS) for course marks;
 - iii) **Schools** are required to maintain and retain for a period of 7 years, records of student attendance, final marks, course outlines, detail assessment records for student work in the course and records of course withdrawal for students in grades 10 to 12.
 - c) Student information on Form 03AL1.2b for students attending First Nations **schools**.
 - d) Student information on Form 03AL1.2a for senior high students taking junior high courses.
2. Adjustments to enrolment data:
 - a) If an adjustment is required to the enrolment data reported to the Information Services Branch on September 30, **school authorities** must ensure that changes are made to their modification file.
 - b) After receiving your first RACERS data, any modification required can be submitted electronically using the "Add, Change, Delete" form (Form 03AL1.2c) before the April 30 deadline.
3. Basic instruction funding for students attending **school** in another province will be based on:
 - a) a copy of the agreement under Section 62(2)(a)(iii) of the *School Act*; and
 - b) a letter indicating the student's name, birthdate and grade.
4. Basic instruction funding for students that are attending a First Nations **school** will be based on:
 - a) a copy of an agreement under Section 62 (2) of the *School Act*; and
 - b) Form 03AL1.2b.
5. Funding for **students with special needs** who are directed by the resident **school jurisdiction** to another **school jurisdiction** under an **educational services**

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agreement will be provided as follows:

- a) The providing/registering **school jurisdiction** will register the student using the 140 code with the 500-grant code, the appropriate special needs code, and the resident **school jurisdiction's school authority** code.
- b) The 140 code results in the student being included in the resident **school jurisdiction's** September 30 headcount and all related funding is provided by Alberta Learning to the resident **school jurisdiction**. This ensures that the **resident board** maintains responsibility for the student. No funding is provided by Alberta Learning to the providing/registering **school jurisdiction**. Payment for student's program is the responsibility of the resident **school jurisdiction**.
- c) For students with severe disabilities coded as 140, the resident **school jurisdiction's** severe disabilities profile number will not be adjusted; therefore the resident **school jurisdiction's** severe disabilities funding will remain unchanged.
- d) The 140 code cannot be used with students coded as 110, 145, 600, or 610.
- e) The 140 code can only be used by **school jurisdictions**. The 140 code does not apply to **private schools, designated special education private schools or private ECS operators**.
- f) RACERS will provide a report of **resident students** who have been coded as 140 by another **school jurisdiction**.

ADDITIONAL INFORMATION

1. The following conditions apply for students with mild or moderate special needs who are attending a **Designated Special Education Private School (DSEPS)**.
 - a) A **school jurisdiction** that directs a student to a **DSEPS** will pay all program costs that are not covered by funding provided by Alberta Learning to the **DSEPS**.
 - b) The **DSEPS** must advise parents of the need to discuss their **child's** mild or moderate special needs eligibility and placement options with their **resident board** prior to enrolment in the **DSEPS**. The **resident board** should retain a record of the discussion. After consulting with the **resident board** about a special education program for their **child**, parents may make an informed decision on the most appropriate placement for the **child**. If parents then choose to send their **child** to the **DSEPS**, enhanced funding of \$8,718 will be paid directly to the **DSEPS**, with no cost to the **school jurisdiction**. These students must be coded by the **DSEPS** using the funding codes 110 and 500 with the applicable special needs 50s code (mild/moderate).

If a parent enrolls their **child** in a **DSEPS** without consulting with the **resident board** on the **child's** eligibility for a special education program, the **DSEPS** will only be eligible for basic support funding of \$5,343 (rather than enhanced funding

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of \$8,718) for these students. Included in the basic support funding rate is funding for basic instruction, transportation and plant operation and maintenance. These students must be coded by the **DSEPS** using the funding code 500 with the applicable special needs 50's code (mild/moderate). The 110 code cannot be used for these students.

The **DSEPS** will report all students enrolled in their **schools** to the Information Services Branch. **DSEPS** will also notify **school jurisdictions**, in writing, of their **resident students** who registered at the **DSEPS**. The **DSEPS** will also forward a copy of this notification to the Director of School Finance, Alberta Learning, confirming which students' parents discussed placement options with their resident **school jurisdiction** and which did not. This confirmation will determine the basis of Alberta Learning's payment to the **DSEPS** (i.e., enhanced funding or basic support funding).

- c) For students enrolled with a **school jurisdiction** on September 30 who transfer to a **DSEPS** after September 30 (or vice versa), funding must be transferred on a pro-rated basis based on a 10-month program. The funding transferred would be based on the months remaining in the school year. For example, if a student transfers to a **DSEPS** on December 1, funding would be transferred as follows:
- i) If the **parent** consulted with the **resident board** on the student's special education program, \$6102.60 would be transferred ($7/10 \times \$8,718$).
 - ii) If the **parent** did not consult with the **resident board** on the student's education program, \$3,740.10 would be transferred ($7/10 \times \$5,343$)

If the student returns to the **school jurisdiction**, the funding must then be returned by the **DSEPS** to the **school jurisdiction** on a pro-rated basis based on a 10-month program.

No pro-rated funding will be provided by Alberta Learning to the **DSEPS** for students enrolled after September 30.

2. Alberta Learning has an agreement with the Canadian Copyright Licensing Agency (Cancopy). Most **schools** in the province are covered in the license. Alberta Learning makes the payment for the license on behalf of all participating **school jurisdictions** and **charter schools**. The cost of the license, plus GST, is recovered from **school jurisdictions** and **charter schools** on a full-time equivalent student basis.
3. Edulink, a multi-function data exchange software tool has been created to help simplify current data management and exchange processes.

The Council of Alberta School Superintendents (CASS) and Association of School Business Officials of Alberta (ASBOA) have agreed their membership will provide the necessary funds to support Edulink for a three-year period –from September 2002 to August 2005. Alberta Learning will deduct 35¢ plus GST per **funded student** and **ECS child** on behalf of all participating **school jurisdictions** and **charter schools**.

This deduction will be made in September and based on the prior year frozen **funded student** and **ECS child** count. The deduction will be reflected on the October funding statement. It is up to the individual **school jurisdictions** and **charter schools** to apply for any GST rebate from the Government of Canada.

Alberta Learning will forward the maintenance fee of \$195,000 to Edmonton Catholic Schools, the host **board**. This funding will provide for the annual maintenance budget but is not sufficient to pay for significant changes to the software.

4. The Alberta School Boards Association (ASBA) has asked Alberta Learning to deduct the ASBA membership fees plus GST from the instruction funding for most **school jurisdictions**. These deductions will be reflected on the October and April funding statements. The deduction is calculated by multiplying a weighted student count times a fee per student (set annually by the ASBA), plus a \$6,500 basic fee charged to each **board**.