

ALLOCATION FORMULA

NEW

$$\text{Small School by Necessity} = \left\{ \begin{array}{l} \text{a) + b) } \end{array} \right\} \times \left\{ \begin{array}{l} \text{\# of small schools by necessity} \\ \text{/} \\ \text{\# of all small schools} \end{array} \right\}$$

a) and b) are calculated using the formulas below. A small school by necessity is described in the ALLOCATION CRITERIA.

A small school is a school that receives funding under a) or b) or both:

a) Base Allocation: the sum of i) and ii) for **schools** in each category,

i) For each **school** with a ' FTE funded enrolment ' * of 150 or less;

$$\text{Base Allocation} = \$76,500$$

ii) For each **school** with a ' FTE funded enrolment ' * of 151 or more but less than a ' FTE funded enrolment ' of 226;

$$\text{Base Allocation} = \$76,500 - \left[\frac{\$76,500}{76} \times \left\{ \begin{array}{l} * \text{ FTE} \\ \text{funded} \\ \text{enrolment} \\ - 150 \end{array} \right\} \right]$$

AND,

b) Variable Allocation: the sum of i) and ii) for **schools** in each category:

i) For each **school** with a ' FTE funded enrolment' * of less than the Peak Enrolment (see Table 1 below):

$$\text{Variable Allocation} = \text{Unadjusted FTE funded enrolment' rate} \times \text{Grade Factor} \times \begin{array}{l} * \text{ FTE} \\ \text{funded} \\ \text{enrolment} \end{array}$$

Where in the above formula,

$$\text{Unadjusted * FTE funded enrolment Rate} = \left\{ \begin{array}{l} \text{School Rate} \\ \text{/} \\ \text{Peak Enrolment} \end{array} \right\} \times \begin{array}{l} * \text{ FTE} \\ \text{funded} \\ \text{enrolment} \end{array}$$

$$\text{Grade Factor} = \frac{\begin{array}{l} \# \text{ of grades} \\ \text{with * FTE} \\ \text{funded} \\ \text{enrolment} \end{array}}{\begin{array}{l} \# \text{ of grades in the} \\ \text{grade configuration} \end{array}}$$

AND, the following table,

TABLE 1

A **school** which does not fit clearly into one of the categories in the Table should be included under the category that is a 'Best Fit', see ALLOCATION CRITERIA #4.

School Type Less Than Peak Enrolment	School Rate	Peak Enrolment	# of Grades in the Grade Configuration
K to 3	\$ 510	40	3.5
K to 6	\$ 1428	80	6.5
K to 9	\$ 1632	80	9.5
K to 12	\$ 2550	80	12.5

PLUS,

- ii) For each **school** with a greater 'FTE funded enrolment' * than the Peak Enrolment (see Table 2 below):

$$\text{Variable Allocation} = \frac{\text{Unadjusted * FTE funded enrolment Rate}}{\text{Peak Enrolment}} \times \text{Grade Factor} \times \text{* FTE funded enrolment}$$

Where in the above formula,

$$\text{Unadjusted *FTE funded enrolment Rate} = \text{School Rate} - \left[\text{Smoothing Factor} \times \left\{ \text{* FTE funded enrolment} - \text{Peak Enrolment} \right\} \right]$$

AND,

$$\text{Smoothing Factor} = \frac{\text{School Rate}}{\left\{ \text{* FTE funded enrolment limit} - \text{Peak Enrolment} \right\}}$$

$$\text{Grade Factor} = \frac{\text{\# of grades with * FTE funded enrolment}}{\text{\# of grades in the Grade Configuration}}$$

TABLE 2

A **school** which does not fit clearly into one of the categories in the Table should be included under the category that is a 'Best Fit', see ALLOCATION CRITERIA #4.

School Type >= Peak Enrolment	School Rate	Peak Enrolment	Small School *FTE funded enrolment limits	# of Grades in the Grade Configuration
K to 3	\$ 510	40	80	3.5
K to 6	\$ 1428	80	150	6.5
K to 9	\$ 1632	80	220	9.5
K to 12	\$ 2550	80	290	12.5

**Smoothing factor: school rate / * FTE funded enrolment limit minus Peak Enrolment

* For the purpose of this section, ' FTE funded enrolment ' is the **funded children** counted at 0.5 full-time equivalent and the number of **funded students** that is equal to the **funded student** head count.

ALLOCATION CRITERIA

1. Small Schools by Necessity funding is provided to a **school jurisdiction** in which the 'distance between schools' is such that the transportation of students from one **school** to another **school** of the same **school jurisdiction** is not practical. 'Distance between **schools**' is defined as 25 kilometres by **highway** in a **rural district** or 6 kilometres by **highway** in an **urban district**. If there are no schools within the 'distance between **schools** ' that can accommodate the additional students because of capacity or grade level considerations a school will be considered necessary.
2. Capacity of a school will be determined in consultation with Alberta Infrastructure. A school with a utilization of 85% is fully utilized.
3. Examples of 'Best Fit ' relative to **school** categories in Tables 1 and 2 are a **school** with enrolment in grades 7 to 9 or a **school** with enrolment in K to 8, the ' Best Fit ' category is K to 9.
4. Students enrolled in Home education programs, **charter schools**, **outreach programs**, **on-line programs** and Hutterite Colony Schools are not counted for funding under this section.
5. Beginning in the 2004-2005 school year **school jurisdictions** will receive Small Schools by Necessity funding for those schools closed that would have qualified as a Necessary Small School. The funding will be provided at a declining rate as follows:

First year School Closed	100% of Small Schools by Necessity Funding
Year 2	75%
Year 3	50%
Year 4	25%
Year 5	0%

6. Schools that closed before the 2004-2005 school year are not eligible to be included for funding under this section.

PROCEDURES, DOCUMENTATION AND REPORTING

1. Student registration information for **funded children** and **funded students** as of September 30 of the current school year that is submitted to the Information Services Branch by October 5.
2. **School jurisdictions** are not required to apply for funding under this section. School Finance will determine the funding entitlement of **school jurisdictions**.
3. Schools of choice will not be considered in Small Schools by Necessity funding. The following list provides examples of the excluded categories of these schools:
 - Outreach Schools
 - Home Education Schools
 - Religious Education School
 - Hutterite Colony Schools
 - Schools that serve mainly students/children with special needs
 - Hockey/Dance Schools
 - Institutional Program Schools
 - On-Line Schools
 - Language Schools
 - French Immersion Schools

This is not intended to be a complete list of all the categories but, for the purpose of this section, is intended to provide clarification of what is meant by schools of choice.