

**September 24, 2004**

**TO: All Superintendents and Secretary-Treasurers of School Jurisdictions, Charter Schools, Private Schools and Private ECS Operators.**

### **UPDATES TO THE 2004-2005 FUNDING MANUAL**

Attached are updated sections of the 2004-2005 Funding Manual for School Authorities. The changes are indicated in the left hand margin as “**Updated**”. Please ensure a copy of this package is provided to any staff who currently have a Funding Manual.

The following is a summary of the changes made:

**Table of Contents:** replace pages 1-3

- Page 2 – added new section 5.4 on Class Size Initiative

**Introduction:** replace pages 3-8

- Page 3 and 4 – updated some contact names and numbers
- Page 6 – the Reference *Standards for Special Education* is updated
- Page 7 - General Condition #3 is updated to reflect that where funding is provided, it is expected that the school authority will provide the related program or service. General Condition #4 indicates that if funding terms and conditions are not met, funding may be reduced or denied.

**Part 1 - Renewed Framework:** replace pages 1-7

- Page 2 - a new Limitation is added indicating that the transfer of revenues into/out of Operations and Maintenance, and School Capital, is prohibited as these are the responsibility of Alberta Infrastructure.
- Page 2 – a new Limitation is added indicating that K-12 funding cannot be used for Adult Learning programs.

## **Section 1.2 Base Instruction Funding For School Jurisdictions:**

replace pages 1-10

- Page 1 - Allocation Criteria #2 is updated to reflect that this funding includes funds to support programs and services for students with mild or moderate disabilities and students who are gifted and talented.
- Page 2 - Allocation Criteria #7 is updated to indicate that Declaration of Management certifying CEU's must be signed and submitted annually. This can be done on RACERS or using the new form 04AL1.2d.
- Page 9 –Additional Information 1(b), last paragraph, has been updated to improve clarity.

## **Section 1.3 Base Instruction Funding - Outreach programs:** replace page 1

- Page 1 - Procedures, Documentation and Reporting #1 is updated to change the application deadline for new Outreach programs from May 31 to March 31.
- Page 1 - Additional Information #2 is new and indicates that the *Outreach Programs Handbook* can assist in developing an Outreach application.
- Page 1 – The Reference *Outreach Programs Handbook* is added.

## **Section 1.6 ECS Program Unit Funding (PUF):** replace pages 1-6

- Page 4 - Procedures, Documentation and Reporting #4 is updated to indicate that when a PUF child leaves a program early, the changes must be reported using the new PUF Application Adjustments Form (form 04AL2.3c).
- Page 5 – Procedures, Documentation and Reporting #8, 9 and 11 are updated to improve clarity.

## **Section 1.8 English As A Second Language (ESL) Funding:** replace pages 1-2

- Page 1 - Allocation Criteria #5 requires that an assessment of proficiency in English be done annually.
- Page 1 - Allocation Criteria #6 is updated to indicate that a maximum of 5 years funding will be provided for eligible ESL students.

## **Section 1.9 First Nations, Métis and Inuit Education (FNMI) Funding:**

replace pages 1-2

- Page 1 - Allocation Criteria #2 is updated to explain that school jurisdictions can choose to either use the 2000-2001 Statistics Canada data or the number of self-identified FNMI students to calculate their FNMI funding. School jurisdictions must notify the School Finance branch by October 15, in writing, of their choice.
- Page 1 - Additional Information #1 Note is updated to indicate the choices available.

**Section 1.12 Intra-Jurisdiction Distance Funding:** replace pages 1-2

- Page 1 - Allocation Formula (b) is updated to indicate that the eligible FTE funded enrollment used in the formula will be a minimum of 100 FTE or the actual enrollment –whichever is greater.

**Section 1.13 Enrolment Growth Funding:** replace pages 1-2

- Page 1 - Allocation Formula b) (first paragraph) is updated to improve clarity.
- Page 2 - Allocation Criteria #7 is updated to reflect that the reported enrollment growth may be reviewed for reasonableness.
- Page 2 - Allocation Criteria #10 indicates that students in home education and on-line programs are not counted for school jurisdiction enrollment growth.
- Page 2 - Allocation Criteria #11 indicates that students in home education, Outreach, and on-line programs are not counted for school enrollment growth.

**Section 1.14 Enrolment Decline Funding:** replace pages 1-2

- Page 1 - Allocation Formula b) (first paragraph) is updated to improve clarity.
- Page 2 - Allocation Criteria #7 is updated to reflect that the reported enrollment decline may be reviewed for reasonableness.
- Page 2 - Allocation Criteria #8 indicates that students in home education and on-line programs are not counted for school jurisdiction enrollment decline.
- Page 2 - Allocation Criteria #11 indicates that students in home education, Outreach, and on-line programs are not counted for school enrollment decline.

**Section 1.17 Relative Cost of Purchasing Goods and Services Adjustment (RCPA) Funding:** replace pages 1-2

- Page 1 and Page 2 – Provided an explanation of how the RCPA Adjustment Factor is calculated.

**Section 1.23 Francisation Funding:** replace pages 1-2

- Page 1 - Allocation Criteria #1 is updated to improve clarity
- Page 1 - Allocation Criteria #5 requires that an assessment of proficiency in French be done annually.
- Page 1 - Allocation Criteria #6 has a wording correction from “English” to “French”. Also this has been updated to indicate that a maximum of 5 years funding will be provided for eligible Francisation students.

**Section 1.24 Stabilization Funding:** replace pages 1-2

- Page 1 - Allocation Criteria #2 is updated to improve clarity.
- Page 1 - Allocation Criteria #3 (b) is updated to indicate that this adjustment will commence in the 2005-2006 school year.
- Page 2 - Allocation Criteria #4 Chart is updated.

**Section 1.25 Enhanced ESL/Francisation and Support Services For Immigrant Students Funding:** replace page 1

- Page 1 - Allocation Criteria #4 is added to clarify that Enhanced Francisation funding and Enhanced ESL funding cannot be claimed for the student.

**Section 2.3 Program Unit Funding:** replace pages 1-4

- Page 3 - Requirement #4 is updated to indicate that when a PUF child leaves a program early, the changes must be reported using the new PUF Application Adjustments Form (form 04AL2.3c).
- Page 4 – Requirements #8,9 and 11 (a) (i) are updated to improve clarity.

**Section 3.2 Instruction Funding for Designated Special Education Private Schools:** replace pages 1-3

- Page 1 - Condition #4 is updated to correct the severe disability funding rate.

**Section 5.4 Class Size Initiative Funding**

- This new section is added to explain the Class Size Initiative funding.

**Section 6.1 Institutional Programs:** replace pages 1-5

- Page 2 - Conditions #5 and #6 have been added to improve clarity.
- Page 2 and Page 6 - b) Resident Students of Government have been removed as there are no more of these “grandfathered” students in private schools.

**Section 6.2 Regional Educational Consulting Services (RECS) Funding**

Replace pages 1-4

- Page 2 - Requirements #3 is updated to indicate that the funding allocation will be comprised of two components; one for Base Operating funding and another for Provincial Initiatives funding.
- Page 2 – Requirement #4 is updated to allow school jurisdictions that provide RECS to retain any surpluses which can be used to offset future expenses or deficits.

**Section 6.3 Learning Resources Credit:** replace pages 1-2

- Page 5 - Additional Information #5 is deleted.

**Section 6.4 Regional Consortium Funding:** replace pages 1-2

- Page 2 - Consideration #1 is updated to correct the payment dates.
- Page 2 - Consideration #3 is updated with a change in “agent board”

**Section 7.1 School Jurisdictions Funding Rates:** replace pages 3-4

- Page 3 - Addition of Class Size Initiative Funding

**Section 7.2 Early Childhood Services Funding Rates:** replace pages 1-2

- Page 1 - Minor change to 2004-2005 rate for Mild or Moderate Disabilities and Gifted and Talented

**Section 7.3 Private Schools Funding Rates:** replace pages 1-3

- Page 1 - Minor wording change to Designated Special Ed. Private Schools (DSEPS) funding description.
- Page 2 - correction to 2003-2004 Severe Emotional/Behavioral funding rate

**Section 7.4 Payment Schedule:** replace pages 1-2

- Page 1 - General Revenue Fund (GRF) payment schedule is updated to reflect two payments in March
- Page 2 – correction to Section 6.4 payment schedule

**Forms Summary:** replace page 1 and respective forms

- Page 1 – added new form 04AL1.2d Declaration of Management.
- Page 1 – changed deadline for Form 04AL1.3.
- Page 1 – added new form 04AL2.3c PUF Application Adjustments.
- Page 1 – added new form 04AL5.4 Jurisdiction Three-Year Class Size Plan.

**Glossary of Terms:** replace pages 1-21

- Page 3 – updated listing of Designated Special Education ECS Programs
- Page 10 – under definition of Funded Student, deleted 2(d).
- Page 11 – changes to definition of Home Visit
- Page 13 – updated listing of School Authorities Approved to Provide an Educational Program in an Institution
- Page 18 – under definition of Deafness, a) is updated to improve clarity.

Any questions regarding the above changes may be directed to myself, Mark Lalumiere, Ken Poon or Jeff Willan at the School Finance Branch 780-427-2055.

Sincerely,

Wayne T. Braun, CMA  
Director  
School Finance Branch