

ALLOCATION FORMULA

$$\text{Small School by Necessity} = \left\{ a) + b) \right\} \times \left\{ \frac{\# \text{ of small schools by necessity}}{\# \text{ of all small schools}} \right\}$$

Updated

+ Closed Schools Calculation (where applicable)

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

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;

$$\text{Base Allocation} = \$78,030$$

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

$$\text{Base Allocation} = \$78,030 - \left[\frac{\$78,030}{76} \times \left\{ \text{FTE funded enrolment}^* - 150 \right\} \right]$$

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 or equal to the Peak Enrolment (see Table 1 below):

$$\text{Variable Allocation} = \left\{ \frac{\text{Unadjusted FTE funded enrolment}^*}{\text{rate}} \times \text{Grade Factor} \times \text{FTE funded enrolment}^* \right\}$$

Where in the above formula;

$$\frac{\text{Unadjusted FTE funded enrolment}^*}{\text{rate}} = \left\{ \frac{\text{School Rate}}{\text{Peak Enrolment}} \right\} \times \text{FTE funded enrolment}^*$$

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

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	\$520	40	3.5
K to 6	\$1,457	80	6.5
K to 9	\$1,665	80	9.5
K to 12	\$2,601	80	12.5

PLUS,

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

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

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,

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

$$\text{Grade Factor} = \left\{ \frac{\text{\#of grades with FTE funded enrolment*}}{\text{\# of grades in the grade configuration}} \right\}$$

TABLE 2

A **school** that 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	\$520	40	80	3.5
K to 6	\$1,457	80	150	6.5
K to 9	\$1,665	80	220	9.5
K to 12	\$2,601	80	290	12.5

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

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**, and Hutterite Colony Schools are not counted for funding under this section.
5. In the 2004-2005 school year **school jurisdictions** started to receive Small Schools by Necessity funding for those **schools** closed that would have qualified as a Necessary Small School. The funding is provided at declining rates 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.

DOCUMENTATION AND REPORTING REQUIREMENTS

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**:

Revised

- Outreach Schools
- Home Education Schools
- Religious Education Schools
- Hutterite Colony Schools
- **Schools** that mainly serve students/children with severe special needs
- Hockey/Dance Schools
- Institutional Schools
- On-Line Schools
- Language/Cultural 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.