

ALLOCATION DESCRIPTION

This funding, which is in addition to Base Instruction funding, is provided to address the higher costs associated with operating schools with low enrollments, where it is not feasible to transport students from these schools to other schools of the same school jurisdiction due to distance and capacity constraints. This is an allocation method only; school jurisdictions have the flexibility to use these funds to best meet their local needs.

ALLOCATION FORMULA

$$\text{Small Schools by Necessity} = \left\{ \begin{array}{l} \text{Total} \\ \text{Base} \\ \text{Allocation} \end{array} + \begin{array}{l} \text{Total} \\ \text{Variable} \\ \text{Allocation} \end{array} \right\} \times \left\{ \begin{array}{l} \text{Total \# of} \\ \text{Small Schools} \\ \text{by Necessity} \end{array} / \begin{array}{l} \text{Total \# of} \\ \text{Small} \\ \text{Schools} \end{array} \right\}$$

+ Closed Schools Allocation (where applicable)

The variables in the formula above are explained in more detail in the Allocation Criteria.

ALLOCATION CRITERIA

The 'FTE funded enrollment' used in Allocation Criteria #1 (Total Base Allocation) and Allocation Criteria #2 (Total Variable Allocation) is determined by counting the number of **funded students** that is equal to the **funded student** head count, plus the number of **funded children** as 0.5 full-time equivalent (FTE).

1. Total Base Allocation:

- a) For each school with a 'FTE funded enrollment' of 150 or fewer;
Base Allocation = \$81,979.
- b) For each school with a 'FTE funded enrollment' greater than 150 but fewer than 226;

$$\text{Base Allocation} = \$81,979 - \left[\frac{\$81,979}{76} \times \left\{ \begin{array}{l} \text{FTE} \\ \text{funded} \\ \text{enrollment} \end{array} - 150 \right\} \right]$$

The Total Base Allocation is the sum of a) and b) for all schools in each category.

2. Total Variable Allocation:

Each school is categorized according to Table 1 below. 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'. For example, a school with enrollment in Grades 7 to 9 or a school with enrollment in K to 8, the 'best fit' category would be K to 9. For a school with enrollment in Grades 9 to 12, the 'best fit' category would be K to 12.

TABLE 1.

Grade Category	School Rate	Peak Enrollment	Small School *FTE Funded Enrollment Limit	# of Grades in the Grade Configuration
K to 3	\$546	40	80	3.5
K to 6	\$1,531	80	150	6.5
K to 9	\$1,749	80	220	9.5
K to 12	\$2,733	80	290	12.5

Once each school is categorized, the data from Table 1 is used in the following formulas to calculate the Variable Allocation for each school:

For each school,

$$\text{Variable Allocation} = \text{Unadjusted FTE funded enrollment rate} \times \text{Grade Factor} \times \text{FTE funded enrollment}$$

Where

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

And

- a) For each school with a 'FTE funded enrollment' fewer than or equal to the Peak Enrollment (see Table 1):

$$\text{Unadjusted FTE funded enrollment rate} = \left\{ \frac{\text{School Rate}}{\text{Peak Enrollment}} \right\} \times \text{FTE funded enrollment}$$

- b) For each school with a 'FTE funded enrollment' greater than the Peak Enrollment but fewer than or equal to the *Small School* *FTE Funded Enrollment Limit (see Table 1):

$$\text{Unadjusted FTE funded enrollment rate} = \text{School Rate} - \left[\text{Smoothing Factor} \times \left\{ \text{FTE funded enrollment} - \text{Peak Enrollment} \right\} \right]$$

Where

$$\text{Smoothing Factor} = \frac{\text{School Rate}}{\left\{ \text{Small School *FTE Funded Enrollment Limit} - \text{Peak Enrollment} \right\}}$$

The Total Variable Allocation is the sum of a) and b) for all schools in each category.

3. Total # of Small Schools

The total number of small schools is the total number of schools in the jurisdiction that have been allocated funding for either the Base or Variable Allocations, or both.

4. Total # of Small Schools by Necessity

For this section, 'FTE funded enrollment' is the **funded students** counted at 1.0 full-time equivalent (FTE), **funded students with severe disabilities** counted at 3.0 FTE, and **funded children** counted at 0.5 FTE.

Each small school (identified in step 3) is deemed to be 'necessary' or 'not necessary' based on the transportation of its 'FTE funded enrollment' to nearby 'receiving schools', in accordance with the following rules:

- a) The distance from the small school to the 'receiving schools' must be within 25 km for schools in rural areas, and within 6 km for schools in urban areas. Urban areas are defined as Edmonton, Calgary, Red Deer, Lethbridge, Medicine Hat, Fort McMurray, Grande Prairie, St. Albert, Sherwood Park, Spruce Grove, and Stony Plain.
- b) The 'receiving schools' must have available capacity to accommodate the additional students. Available capacity at a 'receiving school' is defined as 85% of the school building capacity, less the 'FTE funded enrollment'.
- c) The small school 'FTE funded enrollment' can be allocated to a maximum of 2 'receiving schools' per grade configuration. Grade configurations are defined as K-6, 7-9, and 10-12.

If all conditions above are met, the small school under scrutiny will be considered 'not necessary'. If any of the conditions above are not met, the small school will be considered 'by necessity'. The total # of small schools by necessity is the total number of schools that meet the latter condition.

5. Closed Schools Allocation

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%

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 the **count date** of the current school year that is submitted to Client Relationship Services by the **submission date** (October 3).
2. Students enrolled in Home education programs, **charter schools**, and Hutterite Colony Schools are not counted for funding under this section.
3. **School jurisdictions** are not required to apply for funding under this section. School Finance will determine their funding allocations.
4. **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 Schools
 - Hutterite Colony Schools
 - **Schools** that mainly serve students/children with severe special education needs
 - Hockey/Dance Schools
 - Institutional Schools
 - Online 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.