

This Manual explains the types of funding available to **school authorities** and how it can be obtained. The information in this Manual is not intended as a substitute for provincial legislation, policy, standards, regulations, specific instructions, or explanatory material issued by various branches of Alberta Education.

Alberta Education releases the Funding Manual for School Authorities for the use of central office administrators, school administrators and other parties involved in the funding of Early Childhood Services (ECS) to Grade 12 education. It will assist **school jurisdictions** (including **Francophone regional authorities and charter schools**), **private ECS operators** and **accredited-funded private schools** to access funding from Alberta Education.

### **Section Format**

The format for each section of the Manual describing the funding that is available to **school authorities** is as follows:

#### **PART 1: School Jurisdictions**

Revised

**ALLOCATION DESCRIPTION:** describes the types of costs this funding is provided to address. This is a method of allocating funding and is not intended to prescribe how this funding must be used. School boards have the flexibility in determining how these funds should be spent to best meet their local needs.

**ALLOCATION FORMULA:** the formula used to determine the amount of funding a **school jurisdiction** is eligible for.

**ALLOCATION CRITERIA:** describes the criteria that must be met to qualify for funding.

Revised

**DOCUMENTATION AND REPORTING REQUIREMENTS:** the information **school jurisdictions** are required to provide in order to access funding.

**ADDITIONAL INFORMATION:** other information useful to **school jurisdictions**.

**REFERENCES:** other documents that should be used in conjunction with this Funding Manual.

**PARTS 2 – 7: School Authorities**

Revised

**PURPOSE:** a statement describing the reason the funding is provided.**CONDITIONS:** the conditions under which the funding is provided.**REQUIREMENTS:** what **school authorities** must do to receive funding.**CONSIDERATIONS:** other information useful to **school authorities**.**REFERENCES:** other documents that should be used in conjunction with the Funding Manual.**Information Required for Funding**

Some funding is provided on the basis of student information that **school authorities** have reported directly to Client Relationship Services. Some funding may also be dependent upon **school authorities** submitting a form to the School Finance Branch. All forms referred to in the Manual can be found in the FORMS section of the Manual.

**Glossary of Terms**

The Glossary of Terms outlines the definitions of terms used in the Manual. Each term is printed in **bold face type** throughout the Manual and has a specific meaning for funding purposes.

**Identification of Content Changes**

Users are encouraged to familiarize themselves with this document in its entirety. Changes are identified in each section with the terms “New” and “Revised”. A list of major changes is provided in the accompanying document: *Summary of Significant Changes for 2007-2008*.

**CONTACT ALBERTA EDUCATION FOR ASSISTANCE**

While Alberta Education has made every effort to make the Manual clear and understandable, **school authorities** may require further information. To contact Alberta Education, please refer to the following list of contacts. For calls outside of Edmonton, dial 310-0000 then dial the area code and the number of the contact.

Revised

<b>BRANCH</b>	<b>CONTACT</b>	<b>PHONE #</b>
School Finance	Brad Smith	(780) 422-0920
	Mary-Ellen Deising	(780) 422-0312
	Mark Lalumiere	(780) 422-6550
	Ken Poon	(780) 422-1098
Business Operations and Risk Analysis	Jeff Willan	(780) 422-0930
Financial Reporting and Accountability	Dale Fulford	(780) 422-0870
Special Programs	Director -vacant	(780) 422-6326
	Ron Taylor (Calgary)	(403) 297-5021
Field Services		
Zone 1	Terry Wendel	(780) 427-5394
Zones 2 and 3	Doug McDavid	(780) 427-9296
Zone 4	Loraine Steele	(780) 427-5381
Zone 5	David Woloshyn	(780) 415-9312
Zone 6	Doug Coffin	(780) 427-5377
School Improvement	Keith Jones (acting)	(780) 427-7882
First Nations, Metis, and Inuit Services	Evelyn Good Striker	(780) 415-9300
Client Relationship Services	Help Desk	(780) 427-5318
Governance Support	Rick Hayes	(780) 427-7235
French Language Services	Paul Lamoureux (Acting)	(780) 422-7793
Budget and Fiscal Analysis	Gene Williams	(780) 427-2055
Curriculum	Merla Bolender	(780) 427-2984
	Jennifer Jackson (ESL)	(780) 422-0624
Alberta Children and Youth Initiative	Sandi Roberts	(780) 422-9423

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<b>BRANCH</b>	<b>CONTACT</b>	<b>PHONE #</b>
Stakeholder Technology	Bette Gray	780-427-1509
Capital Planning	Michael Walter	(780) 644-7149
Capital Programs Branch	Mike Irving	(780) 422-7224

Any of the individuals above may be contacted by email by typing their first name, (.) dot, last name followed by @gov.ab.ca, (e.g., [Mark.Lalumiere@gov.ab.ca](mailto:Mark.Lalumiere@gov.ab.ca)).

The 2007-2008 Funding Manual for School Authorities is available for viewing and printing on Alberta Education's Web site at <http://www.Education.gov.ab.ca/funding/FundingManual/>.

Unless otherwise indicated, funding application forms should be submitted to the School Finance Branch at:

Alberta Education  
School Finance Branch  
8<sup>th</sup> Floor, Commerce Place  
10155 – 102 Street  
Edmonton AB T5J 4L5

**FAX:** (780) 427-2147

**DOCUMENTS:**

- Advisory Manual on Early Childhood Service for Incorporated Non-Profit Societies and Private Schools* Available from the Alberta Education website – [www.Education.gov.ab.ca](http://www.Education.gov.ab.ca)  
Contact: Zone Branches – see Contacts for Assistance section of the Introduction.
- Charter School Handbook* Contact: Special Programs Branch  
(780) 422-6326
- Course Mark Quick Reference Code Table* Available from the Alberta Education website:  
[www.education.gov.ab/technology/isb/current/Quick\\_Reference\\_Codcourses\\_Tables.pdf](http://www.education.gov.ab/technology/isb/current/Quick_Reference_Codcourses_Tables.pdf)
- ECS Program Unit Funding. A Handbook for ECS Operators* Contact: Special Programs Branch  
(780) 422-6326
- First Nations, Métis, and Inuit Education Policy Framework – February 2002* Contact: First Nations, Metis, and Inuit Services  
(780) 415-9300
- Funding Manual for School Authorities 2007-2008* Available from the Alberta Education website – <http://www.Education.gov.ab.ca/funding/FundingManual/>.
- Guide to Education ECS to Grade 12 (2005)* Available from the Alberta Education website – [www.Education.gov.ab.ca](http://www.Education.gov.ab.ca)  
Click on Kindergarten to Grade 12, then select Legislation, Regulations and Policies.
- Guide to School Authority (School Board, Charter School, Private School) Planning and Results Reporting* Available from the Alberta Education website – [www.Education.gov.ab.ca](http://www.Education.gov.ab.ca)  
Click on Kindergarten to Grade 12, then click on Information for Administrators select Planning Resources for School Jurisdictions.
- Handbook for the Identification and Review of Students with Severe Disabilities* Available on the Alberta Education website  
[http://www/Education.gov.ab.ca/k\\_12/specialneeds/identificationhandbook.pdf](http://www/Education.gov.ab.ca/k_12/specialneeds/identificationhandbook.pdf)
- Kindergarten Program Statement Revised September 2005* Contact: the Curriculum Branch  
(780) 422-0624 (Jenny Jackson)
- K–12 Learning System Policy, Regulations and Forms Manual* Available from Alberta Education website – [www.Education.gov.ab.ca](http://www.Education.gov.ab.ca)  
To access the Manual, click on Kindergarten to Grade 12 Education then select Legislation, Regulation and Policies.

<i>Private Schools Reference Manual (2003)</i>	Available from the Alberta Education website – <a href="http://www.Education.gov.ab.ca">www.Education.gov.ab.ca</a>
<i>School Infrastructure Manual</i>	Contact: Alberta Infrastructure Capital Programs Division (780) 422-7224
<i>Special Education Coding Criteria 2007-2008</i>	Available on the Alberta Education website: <a href="http://www.education.gov.ab.ca/k_12/specialneeds/SpEdCodingCriteria_2006-2007.pdf">http://www.education.gov.ab.ca/k_12/specialneeds/SpEdCodingCriteria_2006-2007.pdf</a>
<i>Special Education Definitions 2005-2006</i>	Available on the Alberta Education website <a href="http://www.Education.gov.ab.ca/k_12/specialneeds/specialdef_def.pdf">http://www.Education.gov.ab.ca/k_12/specialneeds/specialdef_def.pdf</a>
<i>Standards for Special Education, Amended June 2004</i>	Available on the Alberta Education website <a href="http://www.education.gov.ab.ca/k_12/specialneeds/SpecialEd_Stds2004.pdf">http://www.education.gov.ab.ca/k_12/specialneeds/SpecialEd_Stds2004.pdf</a>
<i>Standards for the Provision of Early Childhood Special Education</i>	Available on the Alberta Education website <a href="http://www.education.gov.ab.ca/k_12/specialneeds/EC_SpecialEdStds2006.pdf">http://www.education.gov.ab.ca/k_12/specialneeds/EC_SpecialEdStds2006.pdf</a>
<i>Student Health Partnership Service Plan Guidelines for 2007-2008</i>	Available at: <a href="http://www.education.gov.ab.ca/sh/PartnerInfo.asp">http://www.education.gov.ab.ca/sh/PartnerInfo.asp</a>
<i>SIS Quick Reference Tables –for coding of students and children</i>	Available from the Alberta Education website at: <a href="http://www.education.gov.ab.ca/technology/isb/current/QReference_Code_Table.pdf">http://www.education.gov.ab.ca/technology/isb/current/QReference_Code_Table.pdf</a>

For copies of “Alberta Statutes” referenced in this Manual, contact:

Queen’s Printer Bookstore  
Main Floor, Park Plaza  
10611 – 98 Avenue  
Edmonton AB T5K 2P7  
(780) 427-4952

OR

For online access to the Statutes use <<http://www.qp.gov.ab.ca>>

For out of town calls, please dial 310-0000 to be connected toll free to any of the above numbers.

General terms and conditions related to funding are listed below. The Manual user should become familiar with these and ensure that they are met.

1. Unless otherwise specified, funding is for the current school year using the payment schedule and funding rates indicated in Part 8.
2. The **Minister** may determine the funding amount and the method by which that amount is determined. This determination may include a reduction in funding where a strike or lockout leads to cessation of services by teachers or other employees of a **school authority**.
3. Funding is provided to **school authorities** with the expectation that the **school authority** will offer the necessary programs or services to meet the needs of all **funded children/students**. It is also expected that **school authorities** will comply with all relevant government legislation, policy, regulations, and standards when applying for funding. **School authorities** are accountable to meet the education needs of all their students and children, for the results achieved and for the use of resources. **Boards** who have entered into an **education services agreement** (under Section 62 of the *School Act*) remain responsible for the educational program of their **resident student** to whom the agreement applies as per Section 45 of the *School Act*.
4. **School authorities** are expected to:
  - a) meet the conditions and requirements outlined in this Manual. Failure to do so may result in a reduction or denial of funding, and
  - b) meet the requirements set out in or adopted pursuant to Sections 39(1) and 47 of the *School Act*, by
    - i) ensuring that only those courses of study or education programs prescribed or authorized by the **Minister** are followed;
    - ii) ensuring that the minimum total hours of instruction are made available to a child or student in a school year;
    - iii) ensuring that only those instructional materials authorized or approved by the **Minister** are used in **schools** (or by the school board for locally developed courses);
    - iv) ensuring that, subject to the right of a **board** to provide religious instruction, a course, an education program, or instructional material that has been prohibited by order of the **Minister**, are not used in **schools**;
    - v) ensuring that goals and standards applicable to the provision of basic education are met; and

- vi) providing special education programming for students with special education needs.
- c) meet the applicable requirements of the *Government Accountability Act* and the *Financial Administration Act*.
- 5. The documents listed in this Manual under “References and Where to Find Them” should be used by **school authorities** as companion documents to the *Funding Manual for School Authorities*. They should not be used exclusive of each other.
- 6. **School authorities** applying for funding shall keep on file, for seven years, the documents required to support their claim for each type of funding described in this Manual, including invoices. The following are examples of other information to be kept on file:
  - a) an eligible enrollment count as of the **count date** for the school year;
  - b) copies of current **educational service agreements** including **transportation agreements**;
  - c) a record of the daily attendance of each enrolled student including high school students, the master timetable and student timetables and documents listed in Section 1.2;
  - d) a list of **schools**, teachers and administrators involved in each program.
  - e) documentation supporting a student’s eligibility as a **funded student/funded child**.
  - f) where applicable, documentation supporting a student’s eligibility for funding as a child of a **temporary resident**
- 7. Alberta Education reserves the right to request and inspect documentation to substantiate data submitted that determines funding allocations and that assists in conducting financial and other reviews. This document inspection may be conducted off-site or on-site in a **school authority**.
- 8. Per the *Learning Grants Regulation 8(1)*, an adjustment may be made to a payment when a review or audit by Alberta Education indicates that:
  - a) a **school authority** has received funding to which it was not entitled – Note: no limitation period; and
  - b) a **school authority** has not received funding to which it is entitled – Note: the limitation period for school authorities to request an adjustment/change to any funding, shall be three years including the current school year.

9. The January and subsequent payments to a **private ECS operator** shall be withheld if the Audited Financial Statements or the Budget Report have not been properly completed in accordance with the respective Guidelines and submitted to the Financial Reporting and Accountability Branch by the due date. When the documents have been submitted and determined to be acceptable, payments will then be released.
10. Payments may be withheld from **school jurisdictions** and **accredited-funded private schools** if the Audited Financial Statements or the Budget Report, or the School Board Three-Year Education Plan or the Annual Education Results Report (AERR), or any other information requested or required by the **Minister**, have not been properly completed in accordance with the respective Guidelines and submitted by the due date. When the documents have been submitted and determined to be acceptable, payments will be released.
11. **School authorities** must develop, keep current, and implement applicable written policies and procedures that are consistent with policies in Sections 1 and 2 of the *K-12 Learning System Policy, Regulations and Forms Manual*.
12. **ECS operators** who have received funding from Alberta Education to provide an **ECS program** and have decided to cease operation may be required to return a portion of their accumulated operating surplus to the Minister of Finance.
13. The **Minister** may fund a **school jurisdiction**, other person, or organization for purposes related to the education of **children** in **early childhood services programs**, or students in **school** programs that are in addition to the funding provisions of this Manual.
14. A budgeted annual operating deficit for an upcoming school year is acceptable if, and only if, sufficient accumulated operating surplus (AOS) funds are available to cover the planned shortfall without impairing the long-term financial health of the **school jurisdiction**. A **school jurisdiction** failing to submit an acceptable budget will be expected to work with Alberta Education to achieve expected financial results, and may be subject to an inquiry under Section 41 of the *School Act* and to the appointment of an official trustee under Section 42 to conduct the affairs of the **school jurisdiction**.

A **school jurisdiction** incurring an accumulated operating deficit (AOD) is expected to work with Alberta Education to eliminate the accumulated operating deficit in accordance with a **Minister** approved Deficit Elimination Plan and may be subject to an inquiry under Section 41 of the *School Act* and to the appointment of an official trustee under Section 42 to conduct the affairs of the **school jurisdiction**.