

EDMONTON PUBLIC SCHOOLS

March 11, 2008

TO: Board of Trustees
FROM: E. Schmidt, Superintendent of Schools
SUBJECT: Basis of Allocation
ORIGINATOR: B. Tams, Assistant Superintendent
RESOURCE
STAFF: Jamie Pallett, Dean Power

INFORMATION

Basis of Allocation

The Basis of Allocation is a mechanism used by Edmonton Public Schools to distribute financial resources to District schools in a manner that reflects the Board Priorities and the needs of students and the school community. The basis is not intended to identify specific costs for the delivery of such programming. Except for Provincial Priority funding which is designated for specific purposes, schools have the freedom to spend their allocations in a manner that reflects district priorities and that address local conditions. Along with that freedom, however, comes the responsibility for making sound decisions which address provincial and District outcomes, and do not place financial hardship on the school now or in the future.

While the Basis of Allocation resembles the Provincial Funding Framework it is distinctively different, evolving over time with input from various District stakeholders. The District Basis of Allocation recognizes the unique learning needs of the students in Edmonton Public Schools and is based on the following principles:

- All resources available for allocation to schools are distributed equitably in accordance with responsibility for results
- Allocations are student driven
- The number of allocation categories is kept to a minimum
- The administrative costs for allocating resources are minimized
- The factors on which allocations are based are clear, consistent and easily obtainable, and
- The basis of allocation is understood and accepted by all concerned.

The Basis of Allocation distributes resources under three different categories:

- Per Pupil Allocations
- Other or "Fixed" Allocations
- Provincial Priority Funding Allocations

A sample allocation is provided in Appendix I.

Per Pupil Allocations

Per pupil allocations are provided for each student enrolled in a school on September 30th of that school year. There are eight different per pupil allocations which take into account requirements of providing programming for all students including those students with mild/moderate special needs as well as severe special needs. The student resource allocation levels, categories and rates for 2007-2008 are displayed in Appendix II.

Other Allocations

Other or “fixed” allocations are provided based on the premise that, over and above the per pupil allocations, schools should receive resources to address the unique circumstances they face. There are approximately 20 Other Allocations (Appendix III). These allocations are sometimes referred to as “fixed” allocations because the total amount for some of the allocations are “fixed” or remain the same year after year.

Provincial Priority Allocations

Provincial Priority funding is targeted and must be used for the identified initiative that it is provided for. The Basis of Allocation includes the following targeted funding allocations:

- Alberta Initiative for School Improvement (AISI)
- Small Class Size Initiative

An explanation of these allocations is provided in Appendix III.

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Appendix I - Sample Allocation

Appendix II - Student Resource Allocation Levels (1-8), Categories and Rates

Appendix III - Other Allocation Categories

**Edmonton Public Schools
2008-2009 ENROLMENT AND ALLOCATION
---[SAMPLE]---**

<u>Per Pupil Allocation</u>	
323 students	1,335,341
<u>Other Allocations</u>	
1 st Program	921
Adaptation Block Grant	3,968
Community Use of Schools (122)	2,536
Consulting/Inservices	43,009
Early Reading Incentive	37,801
Other Services	17,662
Plant Operations & Maintenance	159,897
Reading Recovery Initiative	40,843
Settlement Grant (2002)	48,850
Teacher Aide	10,781
<u>Provincial Priority Funding</u>	
A.I.S.I. Project	29,877
Alberta Education Class Size Fund	<u>179,608</u>
TOTAL	1,911,094

Student Resource Allocation Levels (1-8), Categories and Rates

	Ratio	Rate (per F.T.E. student)
Level 1:	1.00	<u>\$4,069</u>
Blended *		
Elementary		
Gifted and Talented (Challenge)		
Junior High		
Kindergarten		
Level 2:	1.03	<u>\$4,192</u>
Senior High (General)		
Level 3:	1.26	<u>\$5,134</u>
English as a Second Language (Div II-IV)		
International Baccalaureate (Div IV)		
Senior High (Other)		
Level 4:	1.27	<u>\$5,165</u>
Academic Transition		
Amiskwaciy		
Awasis		
Rites of Passage		
Terra		
Level 5:	1.94	<u>\$7,894</u>
Communication Disability		
ECS Mild/Moderate		
ELL Foreign Born Refugee Background		
Gifted & Talented Extensions		
International Students		
Learning Disability		
Literacy		
Mild Cognitive Disability		
Moderate Emotional/Behavioral Disability		
Moderate Hearing Disability		
Moderate Multiple Disabilities		
Moderate Visual Disability		
Non-verbal Learning Disability		
Strategies		
Level 6:	2.17	<u>\$8,843</u>
Moderate Cognitive Disability		
Moderate Physical or Medical Disability		

Level 7:	3.82	<u>\$15,577</u>
Blindness		
Deafness		
ECS Severe Special Needs (PUF)		
Severe Cognitive Disability		
Severe Emotional/Behavioral Disability		
Severe Multiple Disabilities		
Severe Physical or Medical Disability		

Level 8:	5.38	<u>\$21,917</u>
Autistic		
Blindness		
Deafness		
Severe Cognitive Disability		
Severe Multiple Disabilities		
Severe Physical or Medical Disability		

Home Education		<u>\$1,310</u>
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Kindergarten, elementary and junior high students, including those in second language and alternative elementary school programs, and in **home education** programs, **blended programs** and **virtual** schools:

- Allocations are based on 1.0 F.T.E. student with the exception of Kindergarten, ECS Mild/Moderate and ECS Severe (PUF) which are normalized at 0.5 F.T.E.
- Blended elementary and junior high students are funded at Level 1 for the percentage of program the school is responsible for (minimum of 50%), plus the remaining percentage of the home schooling allocation. (For forecast calculation only, blended is 50% of level 1 and 50% home schooling, and is adjusted on September 30.)
 Example: School is responsible for 60% of the student's program:
 60% of level 1 = \$2,441
 40% of home schooling = \$524
 Total Allocation = \$2,965

Senior High General allocations are based upon completion of academic courses by students attending senior high schools. **Senior High Other** allocations are based on completion of courses in International Baccalaureate, vocational, home economics, industrial and career and technology courses including courses at the 14/24 and 16/26/36 levels.

- Allocations are normalized at: Total Credits/36.5 = 1.0 F.T.E. student.
- Blended high school students will be funded on course credit completion, not on the above formula.

Other Allocation Categories

Aboriginal Education Funds: Amount allocated to schools with self-identified Native enrolment greater than 15 per cent of total enrolment.

Adaptation Block Grant: Amount allocated to elementary and junior high schools based on the number of students scoring 2 years or lower on either Reading or Writing on the district HLAT.

Alberta Initiative for School Improvement (AISI): Amount allocated to schools to support collaborative and continuous learning by district staff.

Alberta Learning Class Size Fund: Allocation provided to lower class size averages across the jurisdiction to those recommended by Alberta's Commission on Learning.

Alternate Allocations: The following educational services are exceptions to which the formulae are not applicable.

Alberta School for the Deaf	Rosecrest	WIN House
Early Education Programs	Institutional Services Programs	
Early Intervention Program	Kennedale	

Addition to Basic: Provided to schools with unique operating needs.

Community Use of Schools: Amount allocated as a result of community use of schools at \$16 for the first activity and \$8 for each subsequent activity on the same day during 2008-09, based on the actual 2006-07 bookings for community use. In addition, as a result of new user fees charged for gymnasium use under the Joint Use Agreement, additional revenues will be allocated to schools on the basis of \$25 per hour of weekend use.

Consulting/Inservice: Amount allocated to schools for the purchase of consulting services or inservice opportunities for staff. Allocations are based on weighted enrolment and the amount available per division is based on historical usage data prior to decentralization of these resources.

Designated Receiving School: Amount allocated based on the number of elementary and junior high school students attending designated schools from neighbourhoods where there is no local school (September 30, 2008), at \$51 per student.

Early Reading Incentive: Amount allocated to elementary schools to support early reading initiative programs.

Enrolment Growth: Amount allocated on a monthly prorated basis of the 2008-09 level 1 allocation rate, based on increases in enrolment beyond 5 per cent from September 30, 2008.

Establishment Grant: Amount allocated for the introduction of selected new programs in a school or for the establishment of learning resources collections and supplies in new schools.

High Socio-Economic Needs: Amount allocated to reflect the characteristics of a school's student community based on enrolment, mobility, and incidence of low family income.

Intervention Grant: Amount allocated to senior high schools to provide school based interventions intended to support students deemed to be at risk.

Multiple Program: Amounts allocated to schools with small enrolments and schools with multiple program situations.

Other Services: Amount allocated to schools for services in the areas of leadership services, marketing, information technology services, and the Bennett Centre services. Calculated on the basis of 20 per cent flat rate and 80 per cent of weighted enrolment as a percentage of total dollars available to purchase "other" services.

Plant Operations and Maintenance: Amount allocated to schools to cover the costs associated with operational maintenance, custodial salaries, and school to pay utilities. Calculated on a two part formula: Part I – maintenance allocation (90% area of school + 10% student weighted enrolment); Part II - \$328/elementary student, \$314/junior high student, \$300/senior high student.

Teacher Aide: Provided to schools with Grades 1 to 6. Allocated to schools as a percentage of the total district Grade 1 to 6 population.

Teacher Settlement Grant (2002): Represents the 6 per cent salary enhancement grant from Alberta Education and is based on the total teacher F.T.E.s in the 2002-03 school year.