

Review of Special Education Services for  
First Nations

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INDIAN AND NORTHERN AFFAIRS CANADA

**REVIEW OF  
SPECIAL EDUCATION  
SERVICES  
FOR  
FIRST NATIONS**

**HLA CONSULTANTS  
JANUARY 1993**

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## ACKNOWLEDGEMENTS

This report represents the contributions of many people whose active cooperation and constructive efforts resulted in this review of Special Education Services for Canadian First Nations.

In particular, we acknowledge the contributions of the many provincial government representatives from the Education Departments (Special Education and Finance) in the eight Canadian provinces we visited from Nova Scotia to British Columbia.

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Without exception, the many people, too numerous to acknowledge individually, took time from their schedules to meet with us and provide the information and materials we requested. The excellent cooperation enabled this assessment that we hope will not only serve to assist with a review of funding guidelines for Canadian Indian and Inuit education, but will also be of assistance in all Canadian provinces.

We especially acknowledge the indirect contribution of the many exceptional aboriginal students this study is intended to assist.

In social science research you rarely have the opportunity to become involved in a project where the level of cooperation is exceptional to the extent that people you contact go out of their way to assist. Through this we learnt a lot and got very excited about an interesting and meaningful topic. We feel very fortunate at having had the opportunity to work on this project and meet so many people committed to the education of exceptional children.

The contents of this report are solely the responsibility of HLA Consultants, based on their best interpretation of the information provided and do not necessarily represent the views of DIAND or any of the provinces.

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## 1.0 INTRODUCTION

This assessment of special education services for on reserve Indian elementary and secondary students was prepared as a component of a larger study, being done by HLA Consultants on the provision and resourcing of special education and second level education services in eight Canadian Provinces and seven DIAND Regions.

The Special Education and Second Level Education Studies are two of five studies commissioned by DIAND in their current review of education funding.

The overall study objective is to provide an information base from which funding of special needs education and second level education services can be equitably provided for Indian education in all provinces.

More specific objectives were to:

- for all provinces, identify regulations, practices, and resources for grade school low cost and high cost special needs education services;
- research DIAND policies, funding and practices for special needs education;
- review Health and Welfare Canada and DIAND social development programs, policies and funding for on-reserve disabled students; and
- propose national definitions, standards, cost and funding formulae and the information required for national resource and regional allocation levels;

The methodology employed was the following:

- i) A brief review of data and literature relevant to the topics was conducted;
- ii) meetings were held with DIAND Alberta Region representatives to learn about the funding procedures and develop a sense for the issues;
- iii) consultations were held with two specialists, one in the area of special education and one in the area of education administration to obtain input on some of the practical aspects of data collection related to the research topics;
- iv) data collection procedures and specific information requirements were defined. These and the project parameters were then reviewed with DIAND representatives at Ottawa Headquarters;
- v) personal visits were made to representatives from the education departments' special education branch, finance branch, and in some cases Native education unit in each of the eight Canadian provinces from Nova Scotia to British Columbia; and
- vi) the information was synthesized and presented in two volumes, one each on special education and second level education services.

## 2.0 ORGANIZATION OF THE REPORT

This section describes the presentation of findings from the data collection in each of the eight provinces and seven DIAND Regional offices. The data from each of the provinces are presented in an appendix to this report.

The next and third section presents a description of education resourcing methods utilized by DIAND in their allocation of funds for education purposes, including special education, to each of the regional offices. A description of support services to special education for other DIAND Directorates and other Federal Government departments is also provided.

The fourth section is a presentation of major findings from the information obtained in the provinces and DIAND Regional offices. Extensive use is made of tables to provide more direct provincial comparisons.

The final section presents our major recommendations for DIAND consideration in their review of special education resourcing and allocation methodologies.

The appendix presents the information obtained in each of the provinces and DIAND regions. The information was reorganized and synthesized to suit the purposes of this study.

Describing the provision and financing of education in each of the provinces is very difficult because of the very complex policies, practices, regulations and calculations (formulae) each province uses and presents in a large number of documents. Difficulty in understanding is compounded because of the rapid evolution in the provision and financing of education in each of the provinces. Furthermore there are considerable variations between provinces.

The scope of this research is such that a detailed review and "full" understanding of the processes in each province is not possible. The data in the appendix provide a general overview for each of the eight provincial jurisdictions and specific philosophies, practices and funding methods for select topics are presented in more detail. The presentations are summaries of the information obtained through personal visits to each of the education ministries. The summaries are based on the researchers best level of understanding given the scope of the project. A more thorough understanding would require the reader to obtain and review for each of the provinces the many documents that support the summaries.

Some information that is presented for one province is not always presented for another. This is not necessarily because the information was available in one province but not in another. It may be due to relatively limited research time in a location, availability of key informants, information not readily identifiable for that



topic, simply a different focus and emphasis in a province, or the fact that some provinces have more autonomous school districts and therefore more decentralize services that can't readily be identified within the study scope.

The contents of each of the select topics that are addressed by province are described below:

### **Provincial Context:**

This topic addresses, in a very general manner, the philosophy and financing of education. Among other things, it presents information on: revenue sources; methods by which provincial funds are allocated to school districts; provision for local taxation; total per pupil grants; totals allocated to education; provincial enrolments; district fiscal considerations; and district organization in the provincial context.

### **Special Education:**

The financing and delivery of special education was assessed in a relatively comprehensive manner. The results are presented under several topics.

#### **Approach to Special Education**

In this section the general philosophy and approaches to special education in each province are discussed.

#### **Types and Incidence of Special Needs**

The methods by which provinces categorize special needs students, the categories utilized, and data on incidence levels are examined. The rationale for using categories includes administrative convenience, primarily from a funding perspective, definition for the purposes of student programming. Two very broad categories that are fairly commonly used are "low cost" and "high cost". Within the two broad categories are defined types of special needs.

#### **Identification, Placement and Services**

This addresses the methods utilized for the identification of special needs students having different types of needs. In some provinces additional information on placement was also provided. Rates of incidence were available from some provinces and not from others and with varying degrees of reliability.

A variety of special education services are provided; some are classroom integrated and others, such as "hospital" or "homebound" programs, are not.



Since much of the services provided are generic, the information presented includes general considerations as well as programs that are very specific.

### **Financing of Special Education**

The methods by which special education is funded in each of the provinces are presented in this section. This also includes a discussion on the accountability and reporting responsibilities of the boards and schools in their delivery of services to special needs students.

### **Participation of Other Ministries and Agencies**

Other than the Education Ministry, there are other agencies and ministries that sometimes have involvement in meeting all of the special needs. In most cases this is designed to facilitate the comfort and assistance (human and mechanical) an individual student requires to maximize learning potential.

### **Future Trends and Issues**

This section very generally addresses future trends in special education in the provinces. Additionally, other issues that are not part of the more specific headings described above are included.

### 3.0 DIAND SPECIAL EDUCATION RESOURCING POLICIES AND PROCEDURES

The approach, generally described, for DIAND funding of education services to Canadian First Nations is to allocate education funds to the DIAND Regional offices on the basis of nationally set policies, procedures and funding formulae. The regional offices then allocate the funds within their provincial jurisdictions on the basis of regionally established agreements and/or funding policies, procedures and formulae, that may be different than those employed by DIAND headquarters.

In each region funding procedures vary by type of school the Indian students are enrolled in. The Department recognizes three types of schools for funding purposes:

- provincial schools which include public and private schools;
- operated schools; and
- federally administered schools.

The two that are of major importance are the first two; provincial and band operated schools since relatively few students attend federal and provincial private schools. Of these two, band school funding is of greater concern when addressing the topic of funding equity since students attending provincial schools are funded according to tuition fees established and/or negotiated with provincial school authorities. In provincial schools Indian students receive a level of education comparable to the non-Native students they attend school with. The level of education is sometimes enhanced to respond to specific needs of Indian students; for example, with respect to cultural education and Aboriginal language instruction.

The principles that underlie DIAND's national funding formula for institutional services for on reserve schools and that are considered in the recommendations of this report are the following:

- equity (horizontal) - perceived to be fair;
- sensitivity (vertical equity - accounts for differences);
- efficiency;
- effectiveness;
- administrative viability;
- unconditionality; and
- autonomy;

Funding is on the basis of units established as FTE based on the current nominal role and the student base which is the national per-pupil non-adjusted rate. This provides horizontal equity in the formula.

An incremental student allocation includes a non-adjusted funding allocation for provision of Native language instruction and for low cost special education. The rate for low cost special education is \$195 per pupil based on student full time equivalent basis (FTE) for all students attending reserve schools.

There is then an adjustment factor to recognize "significant cost differences" between schools and communities. The adjustment factors that are applied as multipliers to the student base rate include a geographic index and a small school factor. The geographic index comes from the "INAC band Support and Capital Management Directorate" and is a weighting factor applied to 50% of the student base and the incremental allocation. The small school factor "is designed to supplement the Administrative System Allocation". It is calculated on the average number of students per grade at .05 for 5 students or less and .025 for 6 - 10 students. Other components of the adjustment factor include English as a second language (.05) and second official language (.05 where it applies).

There is an administrative system allocation supplementary to the student base. It is provided for a system with an FTE enrolment of 10 or more at a rate of \$20,000 per eligible system.

High cost special education is resourced separately and is not included as a formula service. For 1991-92, regions were requested to provide to HQ, as part of the MYOP exercise, need identification and cost information for high cost cases. This was then used to obtain and distribute incremental high cost funding for 1991-92. There is no set procedure for allocating high cost funding on a year to year basis, but regions do receive funding based on the information they provide in the "call letter" (MYOP). The MYOP process makes it the responsibility of the band/school/region to obtain professional assessments for high cost cases and request funding commensurate with the evaluations.

In addition to the special education services funded directly by DIAND Education Directorate, other DIAND branches and Federal Government departments provide services to exceptional Indian students. The two major agencies are described below:

### **3.1 Health & Welfare Canada - Services to Natives**

Current federal policy on Indian health is based on a 1979 statement on Indian Health Policy. This policy "recognizes the circumstances under which many Indian communities exist, which have placed Indian people at a grave disadvantage compared to most other Canadians in terms of health, as in other ways." The goal of the policy is "to achieve an increasing level of health in Indian communities, generated and maintained by the Indian communities themselves." Achievement of this goal is seen as based on the following three pillars:

- community development, both socio-economic and cultural and spiritual
- the traditional relationship of the Indian people to the Federal Government
- the Canadian health system.

Under this policy the Medical Services Branch (MSB) of Health and Welfare Canada provides community preventative health and health promotion programs, such as immunization, nutrition counselling and health education, on-reserve. Diagnostic and treatment services and dental treatment services are provided when otherwise not available from the province.

Under the MSB Transfer initiative, some First Nations communities have elected to resume responsibility for their own health programs. In transferred communities, health programs are designed and provided according to community based health priorities.

MSB also provides non-insured health benefits (HB) to eligible status Indians, both on and off reserve, and to Inuit. NIHB are a limited number of medically necessary health related goods and services not available to the eligible status Indian or Inuit from provincial programs or through other forms of third party coverage. Non-insured health benefits include:

- dental care;
- assistance with transportation to access medically necessary health services;
- drugs, medical supplies and medical equipment; and
- vision care.

Non-insured health services are provided to individual clients on the basis of professional medical or dental judgement. MSB has developed both a list of the benefits covered under this program and criteria under which the benefits may be accessed.

There is a need to further review the role of DIAND Social Development and Health and Welfare Canada with respect to their roles with on reserve special needs students.

### **3.2 DIAND Social Development**

Under the First Nations Child and Family Services (FNCFS) Directive, DIAND Social Development provides funding to FNCFS agencies based on a policy principle of commitment to "the expansion of on reserve to a level comparable to those provided off reserve in similar circumstances." As a result the department supports the creation of Indian designed, controlled and managed services. Provincial child and family services legislation forms the basis of this creation of

services. Each DIAND region must "initiate a regional tripartite panel or committee to review program objectives, the development of Indian standards, and to be a vehicle for ongoing discussions on issues of regional concern" (Draft Administration Manual 10-5 Volume 1).

DIAND funds the development of new ICFS organizations for pre-planning, planning, start-up, delivery and evaluation of services. Services included are prevention services, protection services, alternate care and maintenance of children in care (Foster home, group home, institution). Bands are encouraged to get together and cooperate in service delivery. For this purpose funding is based on services to 1000 or more children. Exceptions to this rule are possible on the basis of cultural contrast, remoteness and isolation and/or existing groupings. There is a funding adjustment for organizations serving less than 1000 children. Organizations are required to report periodically on services provided and use of funds.

## 4.0 MAJOR FINDINGS

It is not the intent of this report to conduct an analysis of the pros and cons of the different approaches applied by provinces.<sup>1</sup> Rather, the concern is with findings and analysis that relate to identification of methods for equitable (see equity discussion below) DIAND funding of special education services, for both high cost and low cost.

This in itself is a formidable task for four major reasons:

- i) as evidenced in the appended materials, the financing of education is very complex, in some provinces more so than others, but in all cases requiring the consideration of many variables. This is understandable when we consider how large education budgets are relative to total government budgets (in 1991-92 DIAND education expenditures were approximately 35% of total DIAND expenditures);
- ii) special education is part of the total process of education and cannot easily be addressed in isolation from all other aspects of education;
- iii) the approaches in special education are rapidly evolving with a requirement for considerable data, definitions, and consistent approaches that are necessary before realistic resourcing methods can be developed and applied; and
- iv) when addressing the question of equity with respect to resourcing education, including special education, for Indians in Canada, there are complex questions that require addressing.

The first question that requires to be answered is: "is there is a need for DIAND to identify special education for resourcing and allocation purposes?" The answer, based on what all the provinces do, is very clearly, **YES**. This then leads to the next question: "what is the best method for DIAND to do this?". This last question is the objective of this exercise.

**Equity:** The following tables and appended materials demonstrate that there are virtually no funding standards that are national in nature; all provinces apply their own standards and funding formulae to suit their particular education philosophy, policies and financial ability. Given the tremendously varied approaches, it is not possible to develop standards or formula that can be equitably applied to Indian education across Canada. Vertical equity (equity within a provincial jurisdiction)

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<sup>1</sup>. A detailed presentation of findings from each of the jurisdictions is provided in the appendix.



is necessary and the only reasonable method of assuring Indian students will receive a level of education comparable to non-Native students.

This is a current source of conflict and frustration in that the first funding principal in the national formula is horizontal equity. The factors to arrive at vertical equity recognize geographic and small school cost factors. Based on the information obtained from the DIAND regional offices, this appears to not be effective in achieving vertical equity. The recommendations that follow address methods to better achieve this. The frustration is expressed in the DIAND Regional offices developing their own Region funding formula often totally independent of the National formula, but, by necessity, within the budget generated by the National funding formula. The Regions do this in recognition of a strong need for vertical equity. The DIAND national funding formula is for the purpose of establishing national resources and regional allocation levels, and not individual school budgets.

In this report we define vertical equity as the level of resources required to ensure that Indian students, attending any school type, will receive a level of education that is comparable to that received by non-Indian students in the province in which they reside. This recognises regional differences within the provinces and with the regional adjustment factors the provinces make to equalize education services. This has to be the accepted level of equity for education funding provided by DIAND, since levels, methods, and standards are too different from one province to another. These large differences prohibit any meaningful national equity standards that make sense and do not introduce inequities between Indians and non-Indians within the same province.

Most DIAND Regional offices attempt to resource a level of special education for Indian students comparable to their non-Indian provincial counterparts. Achieving this is not easy, nor is it easily determined, because the national funding formula addresses horizontal rather than vertical equity and the level of information to achieve this and know it is achieved is not available at a regional level. The following recommendations deal with methods to achieve this.

As one might expect in view of provincial autonomy in education, wide variations were observed among provinces in education expenditures, and their content, per unit. For example, average per student spending ranged from \$3505 for instruction only in one province to \$7505 in total for another. Similarly, DIAND regional autonomy has meant per student funding variations among regions. For example, per student funding ranged from \$3868 in one region to \$5713 in another (it is very difficult to obtain comparable data, since there are no standardized definitions or measures). These variations have resulted from efforts to ensure vertical equity among students with differing needs within each province or region rather than efforts to ensure horizontal equity across regions.



**Province/DIAND major findings:** Having established "vertical" equity as the essential principle for DIAND funding of education services, and in this report particularly special education services, Tables I to VI which follow present a comparative summary of findings by topic in each of the eight provincial and seven DIAND Region jurisdictions.

Table I Financing of Education shows the following:

- The proportion of local and municipal contributions to education varies considerably by province as does the spending autonomy allowed individual school boards by the province.
- In all cases the provinces maintain a significant degree of control over the individual school jurisdictions in the manner of delivery and programming of education, and often particularly special education services. This is contrary to Band school education where local autonomy is essentially assured to a much greater degree than even school jurisdictions get from provinces. The autonomous situation creates difficulties for band operated schools because they don't even have the support of centralized services, such as special education consultants, resulting from school district organizations.
- It is apparent that provinces consider a fair degree of centralized control/guidance/support as important to the delivery of quality education services, and more particularly special education services. The reasons for this are couched in the provision of quality services. DIAND needs to examine this aspect/process carefully. It is not intended that DIAND should centrally administer special education services (DIAND has already evolved from this process), but rather DIAND should consider facilitating a process by which First Nations can centrally, possibly through regional councils or provincial bodies, administer their own special education services. These regional councils would provide the specialist support and assistance that the individual band operated schools require to provide a service equitable to that provided by their provincial counterparts. In other words, it is concluded that band operated schools individually, and similar to individual provincial schools, require a well funded support system to provide an equitable level of special education services (equitable to provincial levels).
- There are several mechanisms by which this can be done in the area of special education: provincial or regional Indian organizations; regional band councils; and shared service areas.

Table II Enrolment:

- The enrolment data show that the absolute number of Indian students in band operated schools, relative to total Indian student population, is significantly high in each province. Indian students in provincial schools receive a level of special education services comparable to provincial school non-Indian students. Funding for Indian students in provincial schools is not a critical issue since provincial school districts assess DIAND costs as incurred and are paid directly with the province and school districts assuming responsibility for equitable special education services. They in turn have a legal responsibility to assure this is done.

Table III Special Education Categories:

- There is no standardization of special education student categorization between provinces. This is significant in that categories are typically used for resourcing, assessment and service delivery. This further exemplifies the need for vertical equity within each province.
- Incidence rates are only interpretable provincially in the context of the categorization and definitions that are used. The indication is that in most provinces funding for both low and high cost students serves between 10% and 15% of the total student population. It is significant to note that some provinces, for the Indian student population, recognize higher incidence rates in the low cost special needs category and fund accordingly.
- The age range of service varies significantly at the lower end where intervention is more critical. The tendency is for education departments in most provinces to get involved in early intervention for high cost cases at an early age. This is generally done in cooperation with other agencies such as Health and Social Services. This has become a major consideration of some DIAND Regions. A policy, or policy clarification, is required from DIAND HQ in this area and it should be in the direction and funding for high cost cases at an early age. Education services are required, since the physical and social well-being of the child, in isolation of education, is not sufficient to the eventual welfare of the child. This is necessary to realize vertical equity in many provinces, and will vary by province.

Table IV Special Education Funding and Issues:

- This table demonstrates the wide provincial variance in funding methods for special education. Most provinces provide a block funding amount for low cost

exceptional students. However the amount varies as do the definitions of what is included in low cost special education. The approach to funding high cost students varies to include: a block amount included with low cost; incurred cost as assessed in an IEP; large block amount; and differentiated block based on the category of high cost.

- The amount of resourcing also varies considerably by province. It must also be remembered when looking at this table that in some provinces the provincial contribution is supplemented by a local tax contribution at the discretion of the local board of education.
- DIAND regions do not have a consistent approach to funding special education. In some regions there is an amount set aside in a block for low cost special education and in others it is simply part of the total unit block. The approaches in some regions are not consistent with the approaches in the provinces, making vertical equity impossible. The resourcing from DIAND HQ needs to be both; sufficiently adequate to enable vertical equity with each province, and flexible enough to facilitate regions developing funding policies that will ensure vertical equity.
- There is also no set approach to funding high cost cases and a lack of clear policy, procedures and regulations from HQ, that regions are aware of. This requires more clarification and communication by HQ to the regions so they recognize there are some funds available through the role of the MYOP process. Some regions who are aware of availability of MYOP funds consider the level of funding through this process to be inadequate to meet needs, and not properly arrived at through the MYOP process.
- Because of the varied inter-provincial approaches, a direct comparison of equity between DIAND and provincial funding of special education is difficult. However, it was indicated by many DIAND region representatives that the funding provided for special education, through the funding formula and the MYOP process, is not adequate to permit delivery of special education and second level education services equitable to those provided in provincial schools. This situation is largely exacerbated by lack of economies of scale for specialist services. Some regions use a "global" budget approach and take funds from other budget allocations to supplement that provided for special education through the formulae.

Table V Special Education Trends and Issues:

- The major trend is in the direction of fully integrated special education programs. The rate at which provinces are progressing in this direction varies.
- Some provinces have progressed to a total non-categorical approach and others are heading in this direction.
- There is also a trend toward earlier intervention for high cost cases.

TABLE I

## FINANCING OF EDUCATION

Region	Jurisdiction	Proportion	Local Tax Autonomy	Remoteness Factor	Small School/ Board factor
British Columbia	Province	90/10	Limited to nil	Yes	
	DIAND			Yes	Yes(Inadequate)
Alberta	Province	58/42	Total	Yes	No
	DIAND				Yes
Saskatchewan	Province	48/52 (equalized)	Nil	Yes	Yes
	DIAND	8 Tribal Council Areas			
Manitoba	Province	77/23	Total	Yes	Yes
	DIAND			Yes	Yes
Ontario	Province	44/56	Total	Yes	Yes
	DIAND			Yes	Yes
Quebec	Province	96/4(88-89)	Limited to nil	Yes	Yes
	DIAND			Yes	Yes
Atlantic	New Brunswick		Nil	No	No
	Nova Scotia	80/20	Limited	No	Yes
	DIAND				

**TABLE II  
ENROLMENT\***

Region	Jurisdiction	Total	Proportion
British Columbia	Province	546,000 FTE	30,000 aboriginal 9,500 on-reserve
	DIAND	15,000	10,000 prov. 1,000 independent 4,000 band
Alberta	Province	484,000 FTE	----
	DIAND	14,800	7,000 prov. 7,200 band 600 fed.
Saskatchewan	Province	190,811	----
	DIAND	14,000	4,000 prov. 10,000 band -- fed. (1 school)
Manitoba	Province	195,000	----
	DIAND	15,800	4,100 prov. 10,100 band 1,600 federal
Ontario	Province	1,976,000	----
	DIAND	17,500	8,200 prov. 7,300 band 2,000 federal
Quebec	Province	1,046,208	independent. 101,000
	DIAND	7,289	1,728 prov. 5,002 band 245 federal 260 independent
Atlantic	New Brunswick	140,000	----
	Nova Scotia	165,000 FTE	----
	DIAND	3,500 FTE	50% prov. 1629 band -- fed. (very few)

\* most reported enrolments are for 1991-92



**TABLE III**  
**SPECIAL EDUCATION CATEGORIES**

Region	Jurisdiction	No. of Categories	Incidence	Age Range
B.C.	Province	10 4 low cost 6 high cost	6.7% total 4% low cost 0.84% high cost 1.9% gifted .001% dep.hand.	5 to 19
	DIAND	as prov	N/A	k4 to 19
Alberta	Province	18 9 low cost 6 high cost 3 institut.	11.1% total 10.2% low cost 0.9% high cost	4 1/2 to 19; 2 1/2 to 19 for severely handicapped
	DIAND	as prov	3.3% high cost	K4 to 21
Sask.	Province	13	10-15% total 1.2% high cost	6 to 21; 3 yrs/ high cost
	DIAND	as prov	N/A	K4 to 21
Man.	Province	10	10-12% total 0.95% high cost	5 to 21; trans. prog./ S.H. in nursery school
	DIAND	4	7.1% total 6.3% level 1; 0.6% level 2; 0.2% level3	k4 to 21
Ont.	Province	11	8.0% total	4 to 21
	DIAND	as prov	10.4% band & fed. 7.8% prov. schools	k4 to 21
Quebec	Province	15	12.9% total 11.7% low cost 1.2% high cost	5 to 21 4/severe cases
	DIAND	as prov	N/A	H & W for pre-sch.
Atlantic	New Bruns.	non- categ.	funding for 10%	3 to 21
	Nova Scotia	8	12.2% total	5 to 21
	DIAND	as prov	N/A	K4 to 21



**TABLE IV**  
**SPECIAL EDUCATION FUNDING & RESOURCING \***

Region	Jurisdiction	Funding Method	Resourcing
British Columbia	Province	Teacher & assistant units	\$5780/case low cost \$16089/case high cost \$2991 gifted; \$37840 dep.hand.
	DIAND		\$360/all students - low cost; high cost most in Prov. \$100,000/6 cases
Alberta	Province	Block for low & high cost; suppl. for high incidence of S.H.	\$193 per res. student for high & low cost; \$10234 per S.H. student over 0.75%
	DIAND	Block & unit	\$180/student - low cost block \$20,000 for 1-4 high cost students + a suppl. for 5 or more + \$15000 for aide
Sask.	Province	Block	\$250/FTE low cost \$4454 high cost ; 1 \$6644 high cost 2; + local contrib.
	DIAND	Block & unit	\$405/unit low cost; high cost is by case but >1=teachers aide: Salary x #cases/8
Manitoba	Province	Block for low cost; unit for high cost	Level 1: \$45000 per 180 all pupils + \$45000 per 700 all students; Level II \$8520/case; Level III \$18960/case; Special Ed. is 11.3% of all school boards' expenditures
	DIAND	Block for resource & unit for low cost & high cost cases	\$274 per pupil for Resource (Band schools); Level I \$3800 /case Prov. & \$4560/case Band; Level II \$8520/case - Band & Prov; Level III \$18960/case - Band & Prov.

Region	Jurisdiction	Funding Method	Resourcing
Ontario	Province	Block for all; Province provides schools for deaf, blind & SLD	\$283 per elementary pupil + \$210 per secondary pupil for all types of handicaps
	DIAND	Block & unit	Portion of \$403 per pupil is for low cost; high cost funding is cost minus base support for student; tutor/escort for some @ average cost of \$20400
Quebec	Province	Teacher & assistant units	Complex formula - see sheets; Low cost 1 teacher per 17 teachers; secondary 2/21.5
	DIAND		Low cost in block High cost \$1M total
Atlantic	New Bruns.	Block	\$280-310/FTE block + \$5M/yr. for hearing & visual
	Nova Scotia	Block	\$215 x enrolment x salary factor for low & high cost; \$279/FTE total exp. for all special education
	DIAND	Block	Low cost in block High cost by case up to \$250,000 total for the region

\* In most cases block means that the amount for special education is in the block, but identified for special education. Also, in some cases (e.g. Alberta) the amount specified (\$193) is the amount provided by the province. Additional might be spent from local tax revenues.

**TABLE V**  
**SPECIAL EDUCATION TRENDS & ISSUES \***

Region	Jurisdiction	Trends & Issues
British Columbia	Province	integration; increasing incidence in all categories
	DIAND	LEA's: 10 signed & 30-50 coming
Alberta	Province	integration; special education economies of scale
	DIAND	early intervention funding; integration; high cost recognition in budget
Saskatchewan	Province	integration; accountable for special education expenditures
	DIAND	difficult to identify high cost students with non-standardized report; lower PTR recognizes need; single operating budget for bands
Manitoba	Province	severe behaviour disorders; violence in schools; medical at risk students; \$ shortage; looking at early intervention
	DIAND	coordination beyond the band level; cost differentials by region; higher incidence reported
Ontario	Province	integration; fiscal restraint; grades may disappear: residential schools vs. integration; FAS
	DIAND	insufficient funds for high cost students; band access to special education support; identification issues
Quebec	Province	integration increasing to catch up to others; behaviour disordered increasing; low cost increasing; drop out reduction; going to non-categorical; less complex financing
	DIAND	inadequate high cost \$; better funding direction from HQ; more funds for education
Atlantic	New Bruns.	integration mandated
	Nova Scotia	integration with quality programming
	DIAND	need review, clarify and communicate policy for special needs

\* this table is further explained in the appendix.

## 5.0 CONCLUSIONS AND RECOMMENDATIONS

The following present short and longer term recommendations for DIAND financing of special education services. As mentioned above, approaches in the area of special education are not independent of resourcing for the entire education system.

- There is a requirement for a national policy, recognizing vertical comparability within provinces and regions, to be developed with respect to resourcing and provision of special education and allowing flexibility in regions and sensitivity to First Nations. This is perfectly consistent with the more centralized guidance/support approach to special education in all provinces and that the provinces consider essential to the delivery of quality special education programs.
- DIAND has a very inconsistent approach from one region to the next, with respect to the manner in which they resource special education relative to their provincial counterparts, and with limited information on procedures and regulations from HQ. In many cases funding decisions at region are made by individuals who are not knowledgeable in the area of special education, let alone education, making decisions respecting an area treated with considerable importance in the provinces. This requires review.
- It was reported by most region representatives that the provision of special education services in most cases in band and federal schools is not equitable to that provided in the provincial schools. This is not exclusively a question of money, it is a question of ability in an individual band school setting, with no economies of scale, to afford specialist services, such as special education consultants. A variety of recommendations addressing this follow.
- The level of funding provided by HQ to regions for special education must be designated and sufficient for the regions to fund band and federal schools such that they can provide special education services comparable with the provincial schools, in the same geographic area, in their province of residence (vertical equity).
- A separate allocation clearly identified for low cost and high cost special education is required going from DIAND to the regions and clearly identified going from the regions to the band and federal schools. As done in virtually all provinces, this amount must be an identifiable supplementary allocation, specified down to the individual school level.

- The provinces have a measured track record of incidence rates for various categories of special needs students. This permits them to apply funding, with a relatively high degree of confidence, on a block basis. DIAND has very limited recorded information that would permit block funding of special education and very small schools with no economies of scale to apply this to. To fund adequately (vertical equity) and with confidence DIAND requires to standardize and measure compatible with the provincial approaches.
- Many provinces, again because of the importance of special education, hold the school jurisdictions responsible for the expenditure of special education funds in the area of special education. It is not part of the global budget. This, particularly in the early stages of implementing policy and programs with DIAND, should also be a requirement.
- It will not be possible to block fund, in band operated schools, high cost special education as done in some provinces because of the prohibitive high level and variability of costs and no ability at a band level to spread the costs over a large number of students. It is essential that they be funded on a cost basis, calculated through a professionally prepared IEP. DIAND HQ allocation to the regions must be based on the IEP's that should be subject to audit. Recognizing the Federal Government fiscal process and the resulting difficulties with lag time for funding not being compatible with the "same year" resource needs, HQ should set aside, in advance, a "special fund" they can draw on for high cost special education cases as they come in.
- Low cost special education should be funded on a block basis as a supplementary allocation to the basic rate. In the short term, until a complete set of provincial equity resourcing formulae can be put in place, we estimate the funding should be in the neighbourhood of \$400 per unit (all students). This amount is based on a rough average of provincial expenditures, but is somewhat higher than the provincial and local tax contribution amount in most provinces. This is necessary to go in the direction of resourcing a level of service that is equitable with the provincial schools. It recognizes that there is a higher incidence rate of low cost exceptional students in band than in provincial schools and lower numbers of students thereby band operated schools cannot achieve economies of scale. We emphasize that this value is only to serve as an interim guide, until a more precise value can be calculated individually for each province.
- Funding exceptional Indian students in provincial schools is not an issue in most provinces. Indeed, many high cost on-reserve Indian students attend provincial schools rather than band operated schools because of the specialized services that are available through provincial schools and institutions.



- It will be important to have clear definitions of high cost and low cost cases. This will present some funding difficulties since some provinces, such as New Brunswick, do not differentiate categories for funding purposes. In those provinces further investigation will be required on how the services are provided at district levels and the IEP process that forms the basis of the request to HQ for more funds done as compatibly as possible with the provincial approach.
- The age range of service varies significantly at the lower end where intervention is more critical. The tendency is for education departments in most provinces to get involved in early intervention for high cost cases at an early age. This is generally done in cooperation with other agencies such as Health and Social Services. This has become a major consideration of some DIAND Regions. A policy, or policy clarification, is required from DIAND HQ in this area and it should be in the direction and funding for high cost cases at an early age. Education services are required, since the physical and social well-being of the child, in isolation of education, is not sufficient to the eventual welfare of the child. This is necessary to realize vertical equity in many provinces, and will vary by province.
- The remoteness and small school factor, recognized by DIAND at HQ, is often incompatible with the regional resourcing approaches used for special education in the provinces. It was often reported by DIAND region representative that these adjustment factors are not adequate to sufficiently compensate for the lack of economies of scale resulting from small schools and more particularly from lack of school district support. Again, a national equitable approach is not possible because of the variations in each province. Each region should develop an approach that is consistent with their provincial counterparts to assure special education funding adequate for providing a comparable service.
- A very important consideration is the lack of ability to achieve economies of scale in the provision of special education specialist services (second level). Many provinces recognize that even some multiple school districts can't efficiently do this, and the province compensates for it. Yet, DIAND does not recognize this with individual band and federal schools. Quality specialist services are absolutely essential to the provision of quality special education services. To achieve this, we recommend that DIAND implement a system of shared service areas. The size of the areas would vary in each province/region to recognize distance between band operated schools and total student population. This needs to be reviewed individually in each region. Each shared service area might have approximately 1000 - 1500 students. This number could vary considerably by region and by areas within each region. The number was arrived at intuitively based on the total number and dispersion of students in relatively large geographic areas.

- Each shared service area would have supplementary funding for specialist administrative and special education services (This recommendation is equally important for all second level services and special education services). The positions in each service area should include, at a minimum, the following:
  - director of education; All province recognize that an individual school while having considerable autonomy requires to be directed by an administrative specialist and that this is not possible at an individual school level. The regional director of education would have responsibilities comparable to a district superintendent; assurance of the provision of quality education services consistently applied.
  - two special education/school psychologist consultants; They would require a broad range of skills such that they could assist with assessments, counselling, in-service training (this is very important in the move toward integration e.g. New Brunswick has allocated budget and specialists specifically to deal with the task of integration), assurance of the provision of quality special education services, equitable to those provided in the provincial schools.
- Comparable education services cannot be provided unless DIAND recognizes the need for the above specialist services. Classroom Teachers, generally, are not special education teachers. This is not part of general teacher training. Teachers require considerable support and assistance from professionals if special education services are to be successfully integrated.
- To provide a level of equitable education service (all education services, not just special education in isolation) each region will require a thorough review and understanding of resourcing in each province. The basis for this is well laid out in this and the second level service report, but must be explored in considerably more detail than the scope of this study permitted. Most regions do not have the staff resources with an ability to do this as it requires a good understanding of education.
- It will not be possible to determine if an equitable level of low cost special education services are being provided until a defensible measure of incidence rates is completed in each province. Most provincial education departments, and the literature, recognize that there is a higher rate of exceptional Indian students than non-Indian students, but do not have an incidence measure. Most provinces estimate they fund approximately 10% of the total population in low cost cases (this varies between provinces often because of definitional differences). The measure of incidence rates must be professionally prepared by a researcher who has good technical research capabilities and a good knowledge of special education. The research must begin with a clear definition of student characteristics that qualify for special education services (age/grade



retarded or situationally disadvantaged do not by themselves qualify for low cost services). A good incidence measure in band operated schools is essential to achieve equity at a provincial level. For example, if a province services 10% of students with an allotment of \$200, band operated schools in that province, if they have an incidence of 20%, will require twice that amount (\$400), before any adjustments are made (adjustments such as small school or geographic factors).

- All of the above recommendations must be implemented with the participation of First Nations and with the recognition of local differences and autonomy. The objective and purpose is to provide comparable special education services in all provinces. We feel this is extremely important when you consider the great importance of education, and the very large volume of DIAND education expenditures.
- A good information system, tracking special education expenditures and providing the information base required to make appropriate on-going decisions, in a dynamic evolving process, must accompany implementation of the above recommendations. This is especially critical during the sensitive implementation and initial operating phases.

## **APPENDIX**

### **A REVIEW OF SPECIAL EDUCATION SERVICES PROVINCIAL MINISTRIES & DIAND REGIONS**

## DESCRIPTION OF DATA PRESENTATION

Describing the provision and financing of education in each of the provinces is very difficult because of the very complex policies, practices, regulations and calculations (formulae) each province uses and presents in a large number of documents. Difficulty in understanding is compounded by the rapid evolution in the provision and financing of education in each of the provinces. Furthermore there are considerable variations between provinces.

The scope of this research is such that a detailed review and "full" understanding of the processes in each province is not possible. A general overview is presented for each of the eight provinces and specific philosophies, practices and funding methods for select topics are presented in more detail. The presentations are summaries of the information obtained through personal visits to each of the education ministries. The summaries are based on the researchers best level of understanding given the scope of the project. A more thorough understanding would require the reader to obtain and review, for each of the provinces, the many documents that support this summary.

The information that is presented is not, in all cases, compatible from one province to another. This is not necessarily because the information was available in one province but not in another. It may be due to more limited time with key informants, information not readily identifiable for that topic, simply a different focus and emphasis, or the fact that some provinces have more autonomous school districts than others and therefore more decentralize services that can't readily be identified within the study scope.

The following sections describe the rationale for each of the selected topics that are addressed for each of the provinces. A further section (3.0) describes the services of other federal departments that address health and social needs of special education students.

### 1.0 Provincial Context

This topic addresses, in a very general manner, the philosophy and financing of education. Among other things, it presents information on: revenue sources; methods by which provincial funds are allocated to school districts; provision for local taxation; total per pupil grants; totals allocated to education; provincial enrolments; district fiscal considerations; and district organization in the provincial context.

## **2.0 Special Education**

The financing and delivery of special education was assessed in a relatively comprehensive manner. The results are presented under several topics.

### **2.1 Approach to Special Education**

In this section the general philosophy and approaches to special education in each province are discussed.

### **2.2 Types and Incidence of Special Needs**

The methods by which provinces categorize special needs students, the categories utilized, and data on incidence levels are examined. The rationale for using categories are primarily administrative convenience, from a funding perspective, and definition for the purposes of student programming. Two very broad categories that are fairly commonly used are "low cost" and "High cost". Within the two broad categories are defined types of special needs. Rates of incidence were available from some provinces and not from others, and with varying degrees of reliability.

### **2.3 Identification, Placement and Services**

This addresses the methods utilized for the identification of special needs students with different types of needs. In some provinces additional information on placement was also provided.

A variety of services are provided to special education students; some are classroom integrated and others such as "hospital" or "homebound" programs are not. Since much of the services provided are generic, the information presented includes general considerations and programs that are very specific.

### **2.4 Financing of Special Education**

The methods by which special education is funded in each of the provinces is presented in this section. This also includes a discussion on the accountability and reporting responsibilities of the boards and schools in their delivery of services to special needs students.

## **2.5 Participation of Other Ministries and Agencies**

Other than the Education Ministry, there are other agencies and ministries that sometimes have involvement in meeting all of the needs. In most cases this is designed to facilitate the comfort and assistance (human and mechanical) an individual student requires to maximize learning potential.

## **2.6 Future Trends and Issues**

This section very generally addresses future trends in special education in the provinces, and other issues that are not part of the more specific headings described above.

## **3.0 Health & Welfare Canada - Services to Natives**

Current federal policy on Indian health is based on a 1979 statement on Indian Health Policy. This policy "recognizes the circumstances under which many Indian communities exist, which have placed Indian people at a grave disadvantage compared to most other Canadians in terms of health, as in other ways." The goal of the policy is "to achieve an increasing level of health in Indian communities, generated and maintained by the Indian communities themselves." Achievement of this goal is seen as based on the following three pillars:

- community development, both socio-economic and cultural and spiritual
- the traditional relationship of the Indian people to the Federal Government
- the Canadian health system.

Under this policy the Medical Services Branch (MSB) of Health and Welfare Canada provides community preventative health and health promotion programs, such as immunization, nutrition counselling and health education, on-reserve. Diagnostic and treatment services and dental treatment services are provided when otherwise not available from the province.

Under the MSB Transfer initiative, some First Nations communities have elected to resume responsibility for their own health programs. In transferred communities, health programs are designed and provided according to community based health priorities.

MSB also provides non-insured health benefits (NIHB) to eligible status Indians, both on and off reserve, and to Inuit. NIHB are a limited number of medically necessary health related goods and services not available to the eligible status Indian or Inuit from provincial programs or through other forms of third party

coverage. Non-insured health benefits include:

- dental care;
- assistance with transportation to access medically necessary health services.
- drugs, medical supplies and medical equipment; and
- vision care.

Non-insured health services are provided to individual clients on the basis of professional medical or dental judgement. MSB has developed both a list of the benefits covered under this program and criteria under which the benefits may be accessed.

### **3.1 DIAND Social Development**

Under the First Nations Child and Family Services (FNCFS) Directive, DIAND Social Development provides funding to FNCFS agencies based on a policy principle of commitment to "the expansion of on reserve services to a level comparable to those provided off reserve in similar circumstances." As a result the department supports the creation of Indian designed, controlled and managed services. Provincial child and family services legislation forms the basis of this creation of services. Each DIAND region must "initiate a regional tripartite panel or committee to review program objectives, the development of Indian standards, and to be a vehicle for ongoing discussions on issues of regional concern" (Draft Administration Manual 10-5 Volume 1).

DIAND funds the development of new ICFS organizations for pre-planning, planning, start-up, delivery and evaluation of services. Services included are prevention services, protection services, alternate care and maintenance of children in care (foster home, group home, institution). Bands are encouraged to get together and cooperate in service delivery. For this purpose funding is based on services to 1000 or more children. Exceptions to this rule are possible on the basis of cultural contrast, remoteness and isolation and/or existing groupings. There is a funding adjustment for organizations serving less than 1000 children. Organizations are required to report periodically on services provided and use of funds.



## BRITISH COLUMBIA

### 1.0 Provincial Context:

"Whereas the purpose of the British Columbia school system is to enable learners to develop their individual potential and to acquire the knowledge, skills and attitudes needed to contribute to a healthy society and prosperous and sustainable economy;" (Bill 67 School Act).

There is a provincially established curriculum, but the general direction is to move away from a heavy prescriptive approach to curriculum toward more of **an approach that defines outcome expectations.**

**"The education funding system is based on the block concept** recommended by the Sullivan Royal Commission on Education and the stakeholder groups. The block funds all public education programs except debt servicing and is adjusted annually for economic indicators, changes in enrolment, and changes in mandated programs. Any school board expenditures beyond the district's block allocation and beyond local revenues, must be approved by a local referendum." (Budget Instruction manual 1992/93). In other words, the province determines 100% of local education costs. School boards have only taxation power if they go to a local referendum. Additional revenue generation at a district level is limited (e.g. rentals, some federal grants, some grants from other provincial ministries, offshore student fees). Municipal taxes come back to the province as consolidated revenue. Taxation policy is such that local taxes contribute slightly under 10%.

B.C. moved to block funding in 1991. The block amount is based on 1989/90 expenditures and is adjusted annually based on cost increases, enrolment increases and mandated changes. Part of the increase is based on the reported need for each individual district.

**"The distribution of the block funding is based solely on the district's fiscal framework.** The fiscal framework recognizes variations in districts' costs for providing its various programs (each district receives a block amount that is unique to its costs). The fiscal framework is multiplied by a provincial "gross-up" factor to determine the district block funding amount." (Budget Instruction Manual 1992/93; also detailed in Fiscal Framework Services Level).

A remoteness factor is calculated and applied for each of the school districts (Budget Instruction Manual 1992/93, Appendix III, Remoteness Index for the 1992/93 Fiscal Framework).



The projected 1992/93 students to be funded are approximately 546,000 F T E (full time equivalent). This includes approximately 30,000 aboriginal students of which 9500 are aboriginal students living on-reserve but attending provincial schools.

Most B.C. students are educated through Public Schools Education. There are a relatively small number of Independent (private) schools that are partially funded by the province through contributions separate from the block amount (\$96,855,166 total budgeted 1992/93).

Individual school districts report to the department annually through audited financial statements and prescribed reporting procedures, presented in the Budget Instruction Manual 1992/93.

The 1992/93 budgeted block funding amount is approximately \$3,090,900,000. Additional contributions to the block for schools operating are made for: learning resources; special purpose grants; ESL target grants; growth after Sept. 30 and school meals (\$38,045,306 1992/93). Additional education expenditures include: contributions for school support; the ministers office; and ministry operations (detailed itemization presented in 1992/93 Budget; Ministry of Education and Ministry Responsible for Multiculturalism and Human Rights).

In 1992/93 the block average provincial amount per pupil is \$5661. The range, based on individual district cost factors, is from \$5,036 to \$12,700 (calculation presented in Budget Instruction Manual 1992/93).

## **2.0 Special Education**

### **2.1 Approach to Special Education**

"... a person who is a resident of British Columbia shall (a) enrol in an educational program provided by a board on the following entry date: (generally fifth birthday)... (b) participate in an educational program provided by the board until he or she attains the age of sixteen." (Bill 67 School Act). This makes it a matter of public policy that every child is entitled to an education.

"The ministry of Education is the major agency through which the Government implements this policy. Specific responsibility under section 155 of the school act rests with the locally-elected Board of School Trustees of the district in which the child is resident." (A Manual of Policies, Procedures and Guidelines).

The practice is to integrate special needs students "by the usual method of enrolling a child in a school"... "supports the placement of exceptional children

**in the least restrictive environment according to the needs of the child and available resources."** (A Manual of Policies, Procedures and Guidelines).

Where a Learning Assistance program is provided, to meet the needs of all students in the school, the expectation is that students will receive the major part of their education in the classroom and will not require more than 60 minutes per day in the program.

The general direction is to move toward a system that is based on instructional need rather than categories.

## **2.2 Types and Incidence of Special Needs**

The categories of exceptional students, used for financing and programming, are as follows:

### **High Incidence-Low Cost**

- severely learning disabled
- mildly mentally handicapped
- severe behaviour
- rehabilitation
- hearing impaired

### **Low Incidence-High Cost**

- moderately mentally handicapped
- severely handicapped
- physically handicapped
- visually impaired
- autistic

**Dependent handicapped and gifted are separate categories** of exceptionality.

**NOTE:** Definitions for all of the above categories are found in "Province of British Columbia, Ministry of Education Special Programs, A manual of Policies, Procedures and Guidelines". Also included in this document is a complete description of Identification and placement procedures for each category of exceptionality along with programming, service delivery, evaluation and resources.

For funding purposes the Ministry of Education recognizes the following incidence rates relative to a percentage of the total student population.

- 0.36% - moderately mentally handicapped
- 0.09% - severely and profoundly mentally handicapped
- 1-2% - severe learning disabilities
- 2% - gifted
- 2% - speech and language
- less than 1% for severe behaviour disorders
- 1.35% is the estimated incidence for mildly handicapped

- The total number of students in the various categories was as follows (Provincial Composite Fiscal Framework: 1992/93 Spring Version):
  - high incidence-low cost, 21,675 FTE
  - low incidence-high cost, 4,562 FTE
  - dependent handicapped, 481 FTE
  - gifted 10,497 FTE

It is reported that the incidence of special needs students in all high cost categories is increasing, primarily because of the rapid medical changes in medical technology. The incidence in low cost categories is not reported as changing, but, as indicated, this is likely a function of the enrolment cap (see 1991/1992 School Year. Comparison of Current to Prior Year Special Education Program Enrolment: presents bar graph comparisons of incidence levels by category, for several years).

### 2.3 Identification, Placement and Services

Moderately mentally handicapped children, it is anticipated, will usually be identified prior to their placement in school by parents and/or health care workers. An Individualized Education Plan (IEP) is planned for each child, prepared by a special education teacher with assistance from the classroom teacher. Placement is in the regular classroom, although special class placement may sometimes be necessary.

Severely and profoundly mentally handicapped students, unless the result of illness or trauma, are identified in the first months of life. An IEP is prepared for each of these students. The practice is to integrate, wherever possible, recognizing this is not always possible.

To qualify for Ministry special education funding, physically handicapped students must receive additional or direct service related to their handicap. Identification occurs early in life, unless as a result of illness or trauma. Placement for most is full integration with necessary adaptations.

School districts should have screening programs for the identification and placement of the visually impaired. With adequate support services most of the visually impaired are educated in the regular classroom and follow the regular curriculum.

Most children with significant hearing loss will have been identified prior to their admission to the school system. An IEP is prepared to address the specific educational needs of each child. It is felt that the range of individual needs for

the hearing impaired is such that a variety of options must be available. They include: integration, with the assistance of an itinerant specialist; resource room staffed by a trained teacher; self-contained class; and individualized programs particularly for the multiply handicapped. Placement in a special school, Jericho Hill, occurs when the needs of a particular student cannot be met locally or regionally.

Autistic children go through a district screening program. An IEP is prepared annually for the children requiring special programs. Wherever possible an integrated setting is used.

For severe learning disabled children education is provided on the basis of an IEP. Individualized planning is aimed at maintaining the student in/or returning the student to the regular classroom as soon as possible.

Mildly mentally handicapped students are not identified in earlier years. They become apparent when they enter school and encounter difficulties learning. Integration is the typical mode, with adaptation or special programs, such as work experience in later school years.

For students with severe behaviour disorders identification usually begins at the classroom level. Often regular classroom intervention is not sufficient and involving the services of other ministries is necessary. Individualized programming in a regular classroom setting is preferred, wherever possible.

Needs of gifted students can normally be met in the context of the regular classroom, with regular program supplements.

**Special needs students are the responsibility of Social Services and Health if there is to be any intervention prior to school age as defined by the act.** They become the responsibility of education at school age. The "cut-off" age is technically 19 years, but they may continue if in a graduating program and have a reasonable expectation of completion.

**Speech and language pathology services are provided by the school board with a direct contract with a pathologist or through contract with the Ministry of Health.**

Other specialized services such as physiotherapy are provided much the same as described above.

For most of the above, following assessment, an IEP should be prepared. **Parents should play an important role in the process.**



An evaluation component is a must to measure program effectiveness. "The measure must always be the progress of the exceptional student." (A Manual of Policies Procedures and Guidelines).

For severely handicapped children additional non-education support services are provided.

A Special Education Core Curriculum Supplement is available from the Ministry to assist with programs when the special need is such that the student has to depart at least partially from the standard curriculum.

## **2.4 Financing of Special Education**

While the direction is to move away from categories of special needs, the funding guidelines are categorical to facilitate securing the resources through the financial framework.

Where appropriate, school jurisdictions are encouraged to cooperate and prepare joint plans for special need students, to better achieve certain economies of scale.

For funding purposes there is a 3.6% enrolment cap on high incidence-low cost special need students.

**Funding for high incidence-low cost is as follows:**

- for the first 4 students (FTE): 2.0 teaching unit;
- plus, for the next 32 students: 1.0 teaching units per 8 students;
- plus, for the remaining students: 1.0 teaching unit plus 1.0 teacher assistant unit for every 14 students;
- plus, for the mildly mentally handicapped, there is a provision for job training experience where there is a secondary program which includes job experience. It is 0.15 teaching units for the first 10 students and 0.10 teaching units for every 10 additional students.

**funding for low incidence-high cost is as follows:**

- for each of the first four students: 0.5 special teaching unit plus 0.5 teacher assistant unit;
- plus, for each of the next 8 students: 0.25 special teaching unit plus 0.5 teacher assistant unit;
- plus, for each of the remaining students: 0.125 special teaching unit plus 1/3 teacher assistant unit;
- plus, for the moderately mentally handicapped, job training funded the same as that presented in the point above.

- **funding for the dependent handicapped is as follows:**
  - for the first 10 students: 1.0 special teaching unit plus 1.0 teacher assistant unit;
  - plus, for each of the next three students: 1/3 special teaching unit plus 1.0 teacher assistant unit;
  - plus, for each of the remaining students: 0.2 special teaching unit plus 1.0 teacher assistant unit.
- Provincial composite school district expenditures (Fiscal Framework: 1992/93 spring version) are:
  - high incidence-low cost, \$125.3 million for instruction and job training;
  - low incidence-high cost, \$73.4 million instruction and job training;
  - dependent handicapped, \$18.2 million;
  - gifted, \$31.4 million
- The above, translated to additional special education expenditures per FTE in each category, is approximately as follows:
  - high incidence-low cost, \$5,781/FTE
  - low incidence-high cost, \$16,089/FTE
  - dependent handicapped, \$37,838/FTE
  - gifted, \$2,992/FTE.
- The districts are not specifically accountable for allocating the special education funds they receive to special education purposes, except for a legislated mandate to provide the services and audits to confirm the service is provided.

## **2.5 Participation of Other Ministries and Agencies**

- **For some students, it is recognized that educational services need to be provided in conjunction with services from other ministries,** in particular, Health, Recreation and Welfare. For example, with students who have severe behaviour problems it may be appropriate to involve other ministries such as Human Resources and Mental Health.
- **The Ministry of Education and the Ministry of Human Resources and/or Corrections Branch of the Ministry of Attorney General jointly fund programs that are supervised by the school district to rehabilitate students with severe socio-emotional problems.**
- Some districts, in conjunctions with hospitals, provide programs for students absent from school due to hospitalization. Special teachers for hospitalized



students should support the regular school program. A similar type of homebound program is provided by some districts for students confined to home for health or other reasons.

## **2.6 Future Trends and Issues**

The trends are toward more integration of special needs students in the classroom and the participation of other ministries to facilitate the placement of special needs students in the classroom.

**Incidence rates in most categories of special need are increasing and are expected to continue to increase.** The increases are primarily because of improved survival rates and improved ability to personally function through advances in medicine and through rapid changes in hard technology, providing more ability to learn and communicate. This also facilitates placement in the regular classroom.

## **3.0 DIAND British Columbia Region Office**

### **3.1 General Approach**

Approximately 66% of on-reserve Indian students in British Columbia attend provincial or private schools. **Enrolments are in the neighbourhood of 10,000 students in provincial schools, 1000 in independent schools, and 4000 in band and federal schools** (only 4 federal schools with a total of 10 teachers).

The B.C. Ministry of Education has legislative responsibility for the education of all students resident in the province. On-reserve Indian students are not excepted.

**High cost special needs students of school age are generally in the provincial system.** Prior to school age, their special needs are met by other branches of DIAND and/or other Federal Departments, such as Social Services and/or Health and Welfare Canada.

**Funding Services** in the Region office determine the amount of funds that are available for education and the budgets are then set accordingly.

One problem is that Region gets funded from HQ based on the previous years' Nominal Role and yet the adjustment has to be made locally before they get the funds from HQ.

Another problem is with adult students coming back to grade school and associated methods of funding. The approach has been to fund them on the "block" if they are in a Ministry approved program.

### 3.2 Indian Students In Provincial Schools

Through a Master Tuition Agreement (MTA), currently expired and being re-negotiated, **DIAND pays a per student tuition to the province for the education of Indian students in provincial schools.** The block amount charged DIAND is equivalent to the block amount the district is paid on a per pupil basis for the education of all its students (varies by district according to district cost factors).

Native Indian special needs students are identified and paid for through the block funding amount in a manner equitable to non-Indians.

In addition to the block amount, the band, for student books and supplies, receives \$200 per student attending provincial schools.

All bands, based on a formula, receive funds for an education coordinator (this may not in all cases be sufficient to fund a whole position).

Transportation of students is included in the block. In situations where bands want to run their own student transportation, they have to arrange to get a contract from the local district, payed for by the district to provide the service.

**There is provision in the MTA for bands to opt out of the MTA and sign a Local Education Agreement (LEA) with a local school district.** It is an arrangement for the provision of education services. In this case the band gets the block rate, established for that district and it is up to them how they apply it in the agreement. For example, they might hold some of the block back to run their own student transportation. A LEA acceptable to the Region is necessary. They are generally for a one year term with annual reviews.

For students who attend independent schools, region pays the band the local block rate. The band then enters into a tuition agreement with the school. The "wrinkle" that is introduced is that independent schools typically get 35% to 50% of the block from the Ministry and charge a student tuition of approximately

\$1500/year. The band then receives more funds than it pays for the education of students in independent schools.

### 3.3 Indian Students in Band Schools

- Band schools follow the provincial curriculum.
- Bands can register as independent schools so they can get funding for non-Indians who attend band schools
- Band schools receive funding based on Nominal Role information from Sept. 30.
- **The base rate for the initial allocations is \$4,000 per registered FTE per year (Indian & Inuit Affairs B.C. Region, 1992-93 Management Regime and Budget Allocation, Education). This set amount is based on available budget. It is adjusted as the year progresses to consume the budget.**
- **The \$4,000 is then adjusted by a geographic index developed nationally. The adjustment is then divided by 2 because it is their contention that only 50% of the costs are geographically sensitive.**
- **There is then a small school factor adjustment, exactly the same as the national allocation. The maximum is for a maximum 5% adjustment:**
  - less than 5 units per grade, adjust unit cost @ 5%
  - 5 - 10 units per grade, adjust 2.5%
  - more than 10, no adjustment.
- **The feeling is that the small school adjustment factor is very inadequate. This also relates to the second level services that are economically provided in a multiple-school district setting, which the individual band schools can't have**
- **Administration is funded on the basis that if you have 10 units or more you get \$20,000. There is an assumption that some of the basic unit cost of \$4,000 is for administration.**
- **High cost special education funding is provided on an individual case basis. Documentation using Ministry of Education high cost, low incidence definitions is required. Most high cost students are in provincial schools. There are six high cost funded students in band schools by which region divided the available funds of \$100,000. Prior to this high cost students in band schools were funded at the expense of something else. The expectation is that this number will go up now that funding is recognized as being available.**
- **There is an additional allocation of \$360 per student (geographically corrected) for low cost special education. The feeling is this is higher than what the province provides, recognizing a higher incidence rate. The additional funding for low cost last year came from the \$7 million that Headquarters made**

available to all the regions. Band schools are not accountable for how to spend the low cost allocation.

School evaluations are done every 5 years, funded under a separate allocation. The funds are given to bands as part of their total budget and expected to provide an evaluation every five years.

Like accommodation, student transportation is funded under a separate allocation when there are no alternatives to a boarding situation.

Student financial assistance is based on an allowance schedule of:

- grades 8-10                \$100/yr.
- grade 11                \$200/yr.
- grade 12                \$300/yr.

### **3.4 General Trends and Issues**

**There is a trend in the direction of LEA's.** There are currently 10 signed LEA's and 30 to 50 in progress. This gives the bands a bit more control over education of their students, but is still within the provincial system. It is more local, rather than have it generically covered through a provincial MTA.

## ALBERTA

### 1.0 Provincial Context:

**Elementary and secondary education in Alberta is the shared responsibility of the province and local school boards.** The province establishes goals of education, standards, policies, guidelines and procedures under the School Act. A policy manual, regulations and the School Grants Manual describe the allocation of provincial grants for education and the conditions attached to that funding. School boards determine how education programs and services are delivered and the resources required to carry out their responsibilities. There has been an increasing focus by Alberta Education on results achieved.

School board expenditures are funded from two main sources - provincial grants and property taxes.

**The provincial government provides a program of grants to each school board with the majority of funding being paid in the form of a basic per student grant.** This program of grants is funded from a combination of property tax revenues from commercial and industrial property and general revenues of the province. **The basic per student grant paid to a school board for 1992-93 is \$2161 at the elementary level, \$2324 at the junior high level and \$2506 at the senior high level.** The rate per student in kindergarten ("early childhood services") is \$1260. **This grant is also provided to private operators of early childhood services programs.**

In addition to these basic per student grants school boards are paid grants for student transportation, boarding and fiscal equalization (compensation for low tax base, remoteness and population sparsity). Grants are also paid to school boards for specific programs including community schools, distance learning, high need schools, Native education, languages, special education and vocational education (School Grants Manual).

**School boards may raise additional funds through a local property tax or "supplementary requisition" and various fees. As a result the province funds 58% of total school board expenditures.**

In the 1991-92 school year there were 466,600 students in grades 1-12 enrolled with 186 school boards. There were an additional 34,800 children enrolled in school board early childhood services programs and a further 6,600 enrolled with private operators. Expenditures on students enrolled with school boards is approximately \$2.9 billion.



Individual school boards report their expenditures to Alberta Education annually through financial statements and schedules prescribed by regulation (Financial Reporting Regulation).

The current model for funding education in Alberta has been basically the same since 1970 but has had fiscal equity funding added and revised since then as well as numerous program specific grants. A current concern in the province is that fiscal equity funding is inadequate to deal with disparities in local property tax wealth.

## **2.0 Special Education:**

### **2.1 Approach to Special Education**

Programs and services for all students in Alberta are provided in accordance with the requirements of the School Act and with stated goals and policies. These goals and policies are described in a comprehensive Alberta Education policy manual and a manual on special education grants.

Under the School Act every individual is entitled to have access to an education program in accordance with the Act. A school board is responsible for providing a program for every one of its resident students and may determine that a student is in need of a special education program (The School Act, sections 3 and 29).

A special education program is a program provided for an "exceptional student". An "exceptional student" means a student who requires a different program or an adaptation or modification to the regular school program (Special Education Policy, document number: 02-02-01).

School boards are encouraged, whenever appropriate, to provide programs for exceptional students in regular school environments.

### **2.2 Types and Incidence of Special Needs**

The School Act refers to "characteristics" of a student which may determine the student's need for a special education program. These characteristics are: behavioral, communicational, intellectual, learning or physical characteristics, or a combination of those characteristics (section 29(1)).

More specific types of special needs that are used for administrative purposes include:

- a) Severe handicaps
  - dependent mentally handicapped
  - severe behaviorally disordered
  - multi-handicapped
  - severe physically handicapped
  - deaf
  - blind
- b) Mild/Moderate Handicaps
  - trainable mentally handicapped
  - educable mentally handicapped
  - behaviour disordered
  - learning disabled
  - hearing impaired/hard of hearing
  - visually impaired/low vision
  - speech and language impaired
- c) Institutional/Homebound
  - Social Services
  - Solicitor General
  - Hospitals
  - Homebound
- d) Gifted and talented

In the 1991-92 school year 51,100 out of 460,000 students in grades 1-12 or approximately 11.1% of students enrolled in schools run by school boards were identified as "exceptional students" coming under the above categories. An additional 600 students were served in institutions and homes. In schools run by boards the percentages of exceptional students in each category were: 41.1% learning disabled, 21.0% gifted & talented, 15.7% speech & language impaired, 7.1% educable mentally handicapped, 6.4% behaviour disordered and severe behaviour disordered and 9.7% in other categories. A more detailed breakdown of incidence figures and definitions are found in the recent report from the Alberta Education Response Centre entitled "Students With Challenging Needs: Updated Facts & Figures 1992". Appendix A of the Response Centre report contains a complete set of definitions of categories of "exceptional students".

## 2.3 Identification, Placement and Services

**School boards are responsible for the identification, assessment and placement of exceptional students, development and implementation of Individual Program Plans (I.P.P.), and evaluation of the individual progress of exceptional students**

A student identified by a school board to be in need of a special education program is entitled to have access to a special education program.

School boards shall develop, keep current, and implement written policies and procedures consistent with provincial policies and procedures.

Consultation with the parent and, where appropriate, the student shall occur before a board places a student in a special education program. Depending upon the needs of the student, an assessment of a professional specialist may be used as information in the placement decision making process.

Consistent with the School Act a school board shall establish a procedure to hear appeals regarding decisions which significantly affect the education of an exceptional student.

**A board may determine that it cannot meet the special needs of a difficult-to-serve resident student in an education program provided by the board and refer the matter to a Special Needs Tribunal (Special Education Policy document number: 02-02-01).**

## 2.4 Financing of Special Education

**Provincial grants for "low cost" and "high cost" students consist mostly of a general per student grant to school boards.** This grant is paid to all boards at the rate of \$193 per resident student and is intended to cover both "low cost" and "high cost" students in grades 1-12. However, where a school board has a percentage of severely handicapped students in excess of the provincial "bench mark" (0.75% in 1992-93), an amount of \$10,234 is paid for each such student in excess of this percentage.

For kindergarten (early childhood services) children special education funding is paid differently than for grades 1-12. For mild and moderate handicaps the rate is \$1,478 per child and for severely handicapped children a program unit grant is paid at a rate of \$22,431 for the first child in the unit and an additional amount of \$4,487 for each additional child in the unit, up to 6 children, and \$7,469 for each child in excess of 6 in the unit (School Grants Manual).

School boards are funded on a school year basis. Grants are announced early in the calendar year and, before the end of April, boards submit to Alberta education their budget estimates in a prescribed form. The financial statement of actual expenditures for the previous school year is required by October 31.

Students are funded from age 4 years 6 months in early childhood services and from age 5 years 6 months in grades 1-12 until the age of 19. After age 19 some students are funded as extension students on an F.T.E. basis. In early childhood services a child may be funded as young as age 2 years 6 months where that child is severely handicapped.

Special education expenditures represent approximately 6% of total expenditures for Alberta school boards (Financial and Statistical Report of Alberta School Jurisdictions, 1989-90). However, expenditures in this category tend to be under reported due to the practice of integrating exceptional students with regular classes.

Alberta Education also provides funding for "high needs schools" in Edmonton and Calgary. Grants of this type are for schools which have significant numbers of students who are disadvantaged educationally, socially and economically. Alberta Education has allocated \$2.7 million for this purpose for the 1992-93 school year.

## **2.5 Participation of Other Ministries and Agencies**

- The Alberta Government has various services for persons with disabilities, some of whom may be "exceptional students", both "low cost" and "high cost". Most services to children are provided under Alberta Health and include aids to daily living, coordinated home care, speech language and audiology and early intervention. Aids to daily living assists both disabled and chronically ill persons to secure basic medical equipment and supplies necessary for more independent functioning at home or in a home-like setting. Upon referral by a physician and assessment by program administrators, children with some illnesses may receive various therapies and personal care in the home. Speech-language pathology assessment, consultation and treatment are available at health unit facilities throughout Alberta. The early intervention program provides home-based professional support to families with children who are developmentally delayed from birth to three and a half years of age. "The aim of this program is to strengthen the family's ability to encourage their child's development and to enhance the quality of family life through the provision of support to parents" (A Guide to Services for Albertans With Disabilities, Alberta Family and Social Services).

Two hospitals (Glenrose in Edmonton and Calgary Childrens' Hospital) provide psychological, occupational therapy and physical therapy services when referred by a physician.

The public school boards in Edmonton, Calgary and Grande Prairie provide assessment, consultation and teacher in-service services for severely mentally handicapped students to all Alberta school boards in their regions under a contract with Alberta Education. The Grande Prairie public school board also delivers services to handicapped students on a fee for service to other northern school boards.

## **2.6 Future Trends and Issues**

Integration is an issue with teachers in terms of meeting the psychological needs of students. Also some groups such as the gifted and the learning disabled prefer to be kept separate.

Re-allocation of funds between provincial departments has been an issue (eg. re-allocation of speech and language funds from Education to Health).

Economies of scale in the delivery of special education services is an issue. Alberta has many small school jurisdictions with some operating schools and some not operating schools. Some of these jurisdictions are quite isolated from others. These factors affect the cost of providing services and the feasibility of providing services in many locations. In response to this situation some are forming consortia or partnerships.

## **3.0 DIAND Alberta Region Office**

### **3.1 General Approach**

There are approximately 14,500 Indian students in the region with 7,000 in band schools, 500 in federal schools and 7,000 in provincial schools.

Students are funded from K4 to age 19 with some funded beyond age 19.

There are 15 bands operating schools.

An individual program plan (I.P.P.) is required before a "high cost" student (in a band-operated, provincial school or private school) is funded by the regional office. This plan must be based on a "comprehensive evaluation that includes an assessment appropriate to the situation (educational, medical, psychological,



speech, hearing and other tests and assessments) which identifies the learning disability(ies). IPP's are discussed with parents and appropriate local authorities. The IPP outlines the present level of educational performance goals for the school year, specific intervention strategies, resources needed and outcome measurement and evaluation procedures" (Management Regime). Based on this information the regional office reviews the school's submission and identifies the level of support to be provided.

The regional office does not collect data on the numbers of students with special education needs. However, there is data available on the number of "high cost" special education students. Approximately 490 or 3.4% of 14,500 Indian students in the region are identified as "high cost" special needs students. These students are those in provincial and band schools and who fit the 11 categories listed below.

Numbers of "high cost" students are forecasted from year-to-year based on estimates provided by bands.

Some Native students receive services by attending off-reserve clinics funded by the province. Some on reserve students receive services at clinics run by H. & W.C.. In some cases this includes speech therapy.

H.W. & C. will not provide pre-school or early intervention services of the type provided to non-Indians by the province since it states that this is an education service. As a result the DIAND regional office (since 1991-92) has provided some of these services.

### **3.2 Indian Students in Provincial Schools**

For Indian students who are enrolled in a provincial school (including those who have special needs) actual costs are paid to the school board, either directly or through the Indian band.

### **3.3 Indian Students in Band Schools**

A basic per student amount of \$4850 in 1992-93 is paid for each pupil enrolled in a band-operated school. An additional amount of \$180 per student is paid for "low cost" special education. "High cost" special education is funded under a "management regime" intended to provide additional resources for implementation of a high cost special education program in a band operated school beyond what is generated by the band operated school basic instructional and "low cost" special needs formula. Extra funds are provided



for the incremental costs of students in the following categories adapted from Alberta Education definitions of "handicapping conditions":

- dependent mentally handicapped
- severe behavioral disorder
- multiple-handicapped
- severe physically handicapped
- hearing impaired
- visually impaired
- trainable mentally handicapped
- educable mentally handicapped
- speech and language impaired
- exceptional student
- fetal alcohol syndrome (FAS).

A student is eligible for funding if the student falls into one or more of these categories (High Cost Special Education Management Regime (Band Operated Schools) - Alberta Region).

- Funding for "high cost" special education is paid at a rate per unit (ie. one student in grade 1-12 or 2 students in kindergarten). The rate is \$20,000 for 1-4 units, \$5,000 per unit for 5-8 units and \$1,200 for each unit above 8. For dependent multiple/mentally or severe physically handicapped students a rate of \$15,000 is paid for a teacher aide for 1-5 students.
- Expenditures for low cost and high cost special education are not reported by category. There is no standard chart of accounts among bands to enable this kind of expenditure reporting. In the financial statement of a band, all education expenditures tend to be lumped together under "education" as distinct from other non-education categories of band expenditures.
- Regional tribal councils provide some services to band schools in support of special education.

### **3.4 General Trends and Issues**

- Early intervention programs of the province for non-Native students with special needs are not being resourced and programmed the same for Native students.
- "High cost" special needs students are being recognized in the budgets of regions and band schools.
- Mainstreaming or integration of special needs students is an issue in the region as it is a national issue.

## SASKATCHEWAN

### 1.0 Provincial Context

**"Education in Saskatchewan is based on a commitment to addressing the needs of the individual learner."** The adopted goals of education for Saskatchewan describe the characteristics of an educated person (Special Education Policy Manual, Oct. 1989)

Total 1991 enrolment in provincial schools was 196,566 (190,811 FTE) students.

Boards of Education receive funds from three sources:

- local revenue
- provincial grants
- tuition fees

**The education foundation grant formula** (Operating Grants Paid to School Divisions):

- **Grant = recognized expenditures - recognized revenue**
- **Grant = total of all recognized expenditures - (assessment x equalization factor)**

**The basic per pupil rates in 1992-93 are:**

	<u>Major Urban</u>	<u>All Others</u>
- kindergarten	\$1,555	\$1,640
- elementary	3,007	3,156
- middle	3,224	3,383
- secondary	3,714	3,883

This is the recognized amount, not the amount of the provincial grant since local revenues are netted out (1992 Provincial Funding).

The basic per pupil rates are to cover expenditures for administration, instruction, plant operation and maintenance, non-capital furniture and equipment, non-capital renovations and repairs, current interest expenses and bank charges and special events transportation.

Recognized expenditures are on a per pupil basis, plus incremental cost of special education and other items such as transportation.

Recognized revenue is the basic amount to be paid by local taxation. The equalization factor represents that level of local revenue necessary to provide an acceptable education program.

Availability of provincial funds affects the size of the per pupil basic rate and the equalization factor. The size of grant to any one district depends on ability to pay.

**The ratio of provincial/local education funding is approximately 48%/52%.**

Total recognized education expenditures by all districts in the province in 1991 were \$804,612,219.

**In 1991 total per pupil expenditures** (includes debt retirement, plant operation, transportation, etc., but not Ministry) for all school boards was \$5,169. **If only administration and instructional services are considered, the total expenditure per pupil was \$3,506** (Preliminary Budget Analysis).

The basic program rates are adjusted by a "Sparsity Factor" (the cost of providing the education service increases as the density of students in a school division decreases).

There is a further "Declining Enrolment Adjustment" for districts with continuous decline.

There is a further "Small School Factor Adjustment".

## **2.0 Special Education**

### **2.1 Approach to Special Education**

"The purpose of special education is to provide educational opportunities and support services for exceptional children and youth." (Special Education Policy Manual, Oct. 1989)

**Education of exceptional children is a shared responsibility.**

Early intervention is necessary to enhance opportunities for education.

**Wherever possible the approach is to integrate the special needs student in the regular classroom.**

The school divisions are responsible for the delivery of special education programs in their jurisdiction and are accountable in that they must report they have the program and personnel for high cost and low cost funding.

## **2.2 Types and Incidence of Special Needs**

**Designated pupil funding is recognized through the identification of individual pupils with severe disabilities under the following discrete categories** (Special Education Policy Manual, Oct. 1989. This manual provides comprehensive definitions for all categories and includes descriptions of identification procedures, assessment, placement and services.):

- visually impaired
- hearing impaired
- trainable mentally retarded
- orthopedically disabled
- chronically health impaired
- severely multiply disabled

**Educationally disturbed students include:**

- learning disabled
- socially/emotionally disturbed
- behaviourally disordered
- speech disordered
- language disordered
- low intellectual ability

**Gifted students are a category of special need.**

The total number of high cost special needs students served in Saskatchewan schools in 1991-92 were 2,359. **Special education representatives feel their total incidence rate, all categories, is between 10% and 15%.**

## **2.3 Identification, Placement and Services**

In each of the six education regional offices there is a coordinator of special education. They are responsible for consultation, inservice and data collection in their region.

Additionally, within the Ministry there are special education consultants who provide a range of services including: consultation; curriculum; resource materials; and agency liaison.

In planning the appropriate placement, the major considerations include the following:

- special needs of the child;
- as close to home as possible;

- maximum interaction between disabled and non-disabled students; and
- available support services.

Identification occurs through the parents and the health system for the more severe cases and through parents and teachers for the less severe.

School divisions are responsible for school programs for students between the ages of 6 and 21 years. They may chose to extend their commitment for individual circumstances. **If they are "high Cost", they can enter the system as early as three years of age** (if designated the school division "may" take them and provide a service.).

**"Shared Service" areas have been established in the province.** Through these, several school divisions collaborate to form service areas, creating the enrolment and financial base necessary to support certain special services. Each service area has a minimum enrolment of approximately 7000 (17 in the province). Grants from the department are available to fund 3.5 full-time professional positions, of which school psychology and speech language pathology must be provided.

There is an equipment grant to assist school divisions with technical equipment used by special needs students.

Additional costs of transportation of designated disabled students is provided through a special grant.

"Student of the Province Funding" is available to support students with severe behaviour disorders who are wards of the government, or in a special school, or a relatively new program called "Students in Care of Social Services".

Additional services include "The Psycho-Educational Assessment Clinic" and the "Special Education Information Network of Saskatchewan".

## 2.4 Financing of Special Education

Financing is through incremental rates per pupil enroled in addition to the basic per pupil rate, and must be approved by the Special Education Branch (Operating Grants Paid to School Divisions).

Total special needs education expenditures by all provincial school districts in 1991 were \$37,053,688. The total value of special education services in total in Saskatchewan is now in the neighbourhood of \$48 million (personal communication).

In 1992 the recognized incremental rates for special education were \$4,454 per identified student high cost category 1 (severely handicapped), and \$6,644 for high cost 2 (deaf, blind and/or multiply handicapped). This recognizes that there will be an approximate equal contribution through local tax revenues.

Special needs program funding is for pupils who are learning disabled or emotionally disturbed, low ability, gifted learners, and those with speech or language problems (often referred to as low cost cases). Funding is based on the number of special education support staff reported by each division, up to a maximum of one unit per 200 k-12 pupils (1992 Provincial Funding). The value of one unit is \$25,000. This again recognizes an approximate equal local tax contribution. Therefore, **low cost special education expenditures in total are approximately \$50,000 / 200 = \$250 per enrolled student.** This was derived based on the last ten years of information reported by school divisions.

## **2.5 Participation of Other Ministries**

There is an interagency liaison program between Education, Health and Social Services for activities such as early childhood intervention programs, placement and integrated school based services.

"Students in Care of Social Services" is a service jointly provided by Social Services and Education.

## **2.6 Future Trends and Issues**

The trend is to increased recognition of special education in an integrated setting.

With budget cuts to education in total, funding for special education has not been cut proportionally.

## **3.0 DIAND Saskatchewan Region Office**

### **3.1 General Approach**

Approximately 30% of on-reserve Indian students attend provincial schools. This equates to about 4000 from a total of approximately 14,000 on-reserve Indian students.

Students are eligible for education funding at a k4 level till age 21.



There are 61 band schools.

**"The intent of the Saskatchewan Region of Indian Affairs is to provide education services that parallel those provided by the province." (Policy)**

Lag time in getting enrolment adjustment money from HQ is not a problem because of the large Indian Affairs budget in Saskatchewan, and their approach more and more to administer it as a single operating budget.

The special needs funding for high-cost is to be directed first to the student with the greatest need and then to successively lower levels of need (based on the principle of limited resources).

The region pays the bands not the province, the school districts, or the tribal councils (8 tribal councils in Sask.).

It was indicated there is a real problem with identifying high cost students given the manner in which the nominal role is prepared. It is up to each school and teacher to interpret the definitions and classifications with no standardization. At region level the nominal role information is not used for special needs identification.

For high cost cases Health and Social Services are in the picture prior to K4. At K4 it may be joint depending on the case. The cut-off age is extended to 22 years.

### 3.2 Indian Students in Provincial Schools

Every year the province announces how they'll fund education, including high cost special needs education. Since the province pays 48% and the local tax base the other 52%, some school divisions (approximately 40%) come back to Region and ask to make up the difference for high cost funding, the others do not but could at any time and thereby significantly impact on region education budgets.

Region funds high cost on the basis of an IEP, professionally prepared and consistent with provincial regulations.

Region has discretionary program funding of \$505 per student for supplies and equipment, low cost special education, LD, ED, paraprofessional services, cultural education, curriculum development and some counselling services. Provincial schools receive \$505 less the school supplies component of \$110 for each unit (\$395/student for the above described services, including special

education.)

In some cases, if the band has a tuition arrangement with the board, most of the funds will go directly to the band, if not they'll only get the portion over which they have discretion. Approximately 40% of bands are handling their own tuition agreements.

### 3.3 Indian Students in Band Schools

The categories for high cost special needs students in band schools is the same as those of the province (69 designated high cost students in total).

**High cost special needs students are funded on the basis of an approved program, at cost** (The identification, classification, and programming is done by professionally trained personnel). **However, when there are several designated students in a school, based on the assumption that one teacher and one teacher associate can accommodate up to eight designated students, resources are provided on a prorated basis (e.g. teacher salary + teacher aide salary = X. For designated students funding = 4/8 of X).**

**Band schools are allotted \$405/student, for the range of services described above in provincial schools including services for low cost special needs students.**

Mature students are funded based on 25% of age 17-35 living on reserve.

Band schools are funded at a PTR of approximately 17:1 (but operate closer to 12:1), recognizing higher incidence of need.

**Lack of economies of scale make a band/provincial school equity comparison, particularly with second level services very difficult.**

### 3.4 General Trends and Issues

**Saskatchewan Region more and more are going in the direction of treating their total budget as a single operating budget.** This has implications in education in that they are not so dependent on HQ education funds to come in a timely manner and exactly as needed.

They are going in the direction of establishing more of a community based formula funding methodology which would provide First Nations with additional budget and program flexibility (Saskatchewan Region, Management Regime

1992-93, Elementary/secondary funding).

Several policy areas are under review and development. They include second level services, core curriculum initiatives, development of a standardized education model, and regime and direction for the evaluation of elementary/secondary Indian directed education.

## MANITOBA

### 1.0 Provincial Context

A new funding program called the Schools Finance Program was introduced for the 1992/93 school year. This program is established under the Public Schools Act and is comprised of operating and capital support.

The provincial government determines recognized expenditures for each school board according to a formula which is a combination of amounts per instructional unit and allowable expenditures. Instructional units are based on ratios divided into enrolment with the ratio varying by level of education and school division. The amount of allowable expenditures is determined from expenditures as reported in specified and defined function within the FRAME structure. The recognized expenditures are funded from a combination of provincial grants and local property taxes and mining revenue. The amount of base support paid to a school board is determined by subtracting property tax revenue from the recognized expenditure using a provincial standard mill rate (7.9 mills in 1992/93) for every school board (Funding of Schools 1992-93 School Year).

Base support also includes support for:

- building occupancy costs,
- special needs (level I),
- counselling and guidance,
- library services,
- and professional development.

Categorical support is also provided for:

- transportation,
- board and room,
- additional special needs (levels II and III),
- vocational education,
- English as a second language,
- language development for Natives (off reserve),
- heritage language,
- French language programs/instruction,
- small schools,
- curricular materials,
- students at risk,
- decreasing enrolment,
- remoteness allowance.

Provincial grants are funded through an educational support levy and consolidated revenues of the province.

The number of pupils enrolled for 1991-92 was approximately 195,000 for grades K-12 with 54 divisions and districts. Expenditures for these students is approximately \$1.1 billion.

Individual school boards report their expenditures to Manitoba Education annually through prescribed financial statements which use standardized expenditure categories under a structure referred to as FRAME. The new funding plan uses amounts reported in some of these categories for 1992-93 to influence the amount of funding provided where actual expenditures are less than the amount of funding provided in the category.

## 2.0 Special Education

### 2.1 Approach to Special Education

**"In Manitoba, as a matter of public policy, all children are entitled to a public school education. The Public Schools Act requires that 'Every school board shall provide or make provision for education in Grades 1 to 12 inclusive for all resident persons who have the right to attend school' (Section 41[4]). This section of the Act constitutes mandatory legislation for school divisions/districts to provide education programs for all children, including those children with special learning needs" (Special Education in Manitoba: Policy and Procedural Guidelines for the education of Students with Special Needs in the Public School System).**

**"The goals of special education is consistent with the goal of regular education: to support students in developing the knowledge and skills they require to live meaningful, self-fulfilling lives with as much independence as possible in their communities. It is the policy of Manitoba Education and Training to support the education of students with special learning needs in regular classroom settings whenever this is in the best interests of students. A variety of special supports are available to facilitate such integration. Support is also available for students who require alternative learning environments for a portion or all of the school day" (Policy and Procedural Guidelines).**

Provincial policy is to provide for all children access to learning opportunities which are commensurate with their needs and abilities. For students with

special learning needs, this means that school divisions/districts are responsible for:

- offering appropriate educational programs and the support services needed by students,
- providing the most enabling learning environment possible under the circumstances,
- providing individualized programs when appropriate,
- using a program planning process involving a team approach - parents, educators, support personnel - and the student where possible.

**All school divisions are required to develop and keep current a board-approved Annual Divisional Special Education Action Plan (ADAP).**

**Principles and procedures are the same for "low cost" and "high cost" students, although the resources required for programming do differ.**

## **2.2 Types and Incidence of Special Needs**

For funding and programming purposes special needs students fall under three categories or levels:

### Level II

- Severely multi-handicapped
- Severely psychotic
- Severely autistic
- Deaf/hard of hearing
- Severely visually impaired
- Severely emotionally/behaviorally disordered

### Level III

- Profoundly multi-handicapped
- Profoundly deaf
- Profound emotional/behavioral disorders

Level I students are those who have less severe disorders. Level II and III students tend to be "high cost" and Level I students are "low cost".

Level I students are usually integrated but some such as EMH, TMH and language development students have special classes. The majority of Level I students are integrated. Level II students are integrated but some require a



segregated setting. Definitions of categories under each funding level are found in Annex I, "Guidelines for Application for Low Incidence Support for School Divisions/Districts".

Manitoba Education does not "count heads" or do formal surveys to identify the number of special needs students. The number of level II and III students is 1850 out of 196,000 students or 0.95%. Although the number of level I students has not been counted, one department official estimates incidence (including gifted students) of about 10-12% in southern Manitoba and as much as 20% in northern Manitoba.

### **2.3 Identification, Placement and Services**

"Decisions regarding the educational placement of students who require extensive modification of their educational programs shall be based on a goal-directed written Individual Education Plan (IEP)" (Policy and Procedural Guidelines).

School divisions/districts shall provide for early identification and intervention programming. This starts in kindergarten with the teacher identifying students at risk and setting up teams to develop programs for maximum achievement. The province is now working on a transition program for identification of students with special needs in nursery school. School boards also have a transitional program for T.M.H. students and others who need support when they leave school. (This involves an agreement among the departments of Education, Health and Family Services).

Identification and placement of special need students are required to incorporate the following elements and principles in addition to early identification and intervention:

- systematic assessment of a student's educational needs,
- a cooperative approach involving all persons who have information relevant to the student,
- programming and placement shall be based on a comprehensive plan,
- provision of the most enabling learning environment.

**This process may include an assessment by a professional specialist where it is deemed that such an assessment would assist in ensuring the best placement for the student.**

Generally the options for placement range from enrolment in a regular class with minor program modifications to regular classroom instruction plus

supplementary instructional services to segregation in to a full time special class or facility. **Specific service for individual categories of special needs students are not prescribed in order to encourage a school to look at what will work best for the student.**

## **2.4 Financing of Education**

Provincial grants for "low cost" or level I special needs students consist of a \$45,000 grant per 180 eligible enrolment which is equivalent to \$250 per student. Coordinator or clinician support is also provided at a rate of \$45,000 per 700 of eligible enrolment, equivalent to \$64 per student. Level II support is \$8,520 for each student who fits this category. Level III funding is \$18,960 for each student who fits this category (1992-93 rates of support).

School boards are funded on a school year basis. Manitoba Education reviews applications for level II and III funding individually with the process beginning in the May-June period prior to the school year the funding is applied for.

Manitoba Education funds students from kindergarten age (age 5 as at December 31) until age 21 or, on an exception basis, age 22. There is a nursery school program in some schools but this is funded by Family and Social Services.

Special education expenditures or expenditures on "exceptional" programs represent approximately 11.3% of total expenditures for Manitoba school boards in 1991-92. This includes expenditures on administration and co-ordination of special education, the teaching of exceptional students in special classes and special support and services given to pupils in both regular and special classes (eg. teacher aides). Administration is 0.5%, instruction is 2.5% and support services is 8.3%. However, expenditures in these categories tend to be under reported due to the practice of integrating exceptional students with regular classes.

Manitoba Education recently introduced funding for "students at risk". This funding which will total \$10 million in 1992-93 is provided for regular and pilot compensatory projects in Winnipeg schools with identified at risk students. This funding is targeting students who are identified based on the following criteria:

- school attendance rate
- students who are 2 or more years behind their age group in reading and numeracy skills

- total school enrolment
- migrancy rate
- students formally involved with social service agencies
- number of students referred because of language difficulty
- total population
- incidence of low income
- single parent families.

## **2.5 Participation of Other Ministries and Agencies**

Manitoba Health and Manitoba Family Services participate in the planning process for school leavers (eg. TMH students). Family Services provides a service to the home for behaviour disordered students. Manitoba Health may provide nursing services for a student in a health crisis including a medical procedure during a school day.

There are various services for disabled persons which are available from government and non-profit agencies. A listing of these is available in a services handbook from the Society for Manitobans with Disabilities.

## **2.6 Future Trends and Issues**

Violence in schools.

Severe behaviour disorders are growing steadily, mainly in Winnipeg but also in rural areas.

Medically at risk students and behaviour disordered students are a source of conflict with the Manitoba Teachers' Society.

Fiscal restraint and a shortage of funds for special education.

## **3.0 DIAND Manitoba Region Office**

### **3.1 General Approach**

The regional office has developed policies and procedures for DIAND schools which are similar to those prescribed for provincial schools (Resource Unit - Special Education Procedures Manual). Although these policies and procedures are followed for federal schools, band schools may or may not be following them.

The total population of Native students in 1991-92 in the region was 15 348 with 64% being in band-operated schools, 26% in provincial schools and 10% in federal schools. This included approximately 1120 special needs students in the three levels. Of these , 55% were in band-operated schools, 34% in provincial schools and 10% in federal schools.

The regional office categorize special needs students according to the three "levels" used by Manitoba Education. Within the population of Native students attending provincial and band-operated schools the incidence rates at each level are approximately the following:

- Level I: 6.3%
- Level II: 0.6%
- Level III: 0.2%

This is a total of 7.1% of students in band-operated and provincial schools. It does not include any gifted students, students receiving "language development" support or students with an identified special need who are not funded. The 0.8% in levels II and III compares with 0.95% at these levels among the non-Native population in provincial schools.

Special needs student population forecasts are largely judgemental based on a regional office assessment of what is reasonable when considering past funding.

Health & Welfare Canada provides nursing stations on some reserves to which special needs students have access. Some vision, hearing and psychomotor skills screening occurs at these stations. Some psychologist services are also provided by HWC in some communities under contract with consultants. The Medical Services Branch provides "uninsured benefits" which include glasses, dental care and wheelchairs.

Manitoba Family Services operates a program with federal funding. A local agency supported by Family Services serves several bands and becomes involved if a child is neglected. Involvement takes the form of counselling or, upon referral by a physician, psychological services.

A categorical breakdown of special education costs is not available.

### **3.2 Indian Students in Provincial Schools**

For Indian students who have special needs and who are enrolled in a provincial school a fee equivalent to actual cost is paid to the school board.

In the region the term "high cost" is applied to the three "levels" used by Manitoba Education. In addition to the tuition fee for a regular pupil support for specific pupils in each of these levels is provided as follows for pupils in provincial schools:

- Level I: \$3800 per unit.
- Level II: \$8520 for each pupil.
- Level III: \$18,960 for each pupil.

Language development funding is also provided to some provincial schools where Native students attend. This funding is paid at a minimum rate of \$400 and a maximum rate of \$660 per pupil with the rate depending upon the ratio of Native to total population in the school. A high ratio means a lower rate. The average rate is \$600. This funding only applies to 6% of pupils attending provincial schools.

### **3.3 Indian Students in Band Schools**

An amount is included in the basic per pupil grant paid for each pupil enrolled in a band-operated school. This basic per pupil amount for 1992/93 consists of a student base amount of \$3868 plus an "incremental student allocation" of \$461. **The incremental student allocation consists of \$187 for "native language" and \$274 for "resource teachers".** These amounts are subject to "adjustment factors" to increase funding by a percentage to recognize geographic cost factors and school size. The percentage varies with the school.

In the region the term "high cost" is applied to the three "levels" used by Manitoba Education. Support for specific pupils in each of these levels is provided as follows for pupils in band-operated:

- Level I: \$4560 per unit.
- Level II: \$8520 for each pupil.
- Level III: \$18,960 for each pupil.

### **3.4 General Trends and Issues**

Coordination beyond the school level is missing in the band-operated and federal school systems. Each school seems to stand alone.

Cost differentials by region.



Resources may decline when a special needs student moves from a federal school to a band-operated school.

More FAS children and children suffering from the effects of gas sniffing. There are whole communities with these kinds of problems.

Children who have experienced physical and sexual abuse.

Group homes on reserves housing students with problems.

Increasing cost of funding special education arising from:

- bands improving identification and program planning
- incidence of "high cost" students due to socio-economic problems
- children who, in the past would have stayed home, are attending school
- provincial rate increases for special education.

Concern about whether additional funds based on "50% of incremental costs" was really additional funds or came out of funds for provincial tuition.

## ONTARIO

### 1.0 Provincial Context:

"Elementary and secondary education in Ontario is the shared responsibility of the province and local school boards. The province establishes objectives, standards and guidelines through the Education Act, policy memoranda, and regulations such as the General Legislative Grants Regulation that determine the allocation of provincial grants for education funding. School boards determine how education programs and services are delivered and the resources required to carry out their responsibilities.

School board expenditures are funded from two sources - provincial grants and property taxes." (Toward Education Finance Reform: A description of the Present Funding Model and the Terms of reference for Reform, and the 1992 General Legislative Grants Regulations).

The provincial government determines recognized expenditures for each school board according to a per pupil formula. These recognized expenditures are funded from a combination of provincial grants and property taxes. The amount of basic per pupil grants paid to a school board is determined by subtracting property tax revenue from the recognized expenditure using a provincial standard mill rate for every school board. School boards may fund unrecognized expenditures from additional property taxation. As a result the province funds 55% of recognized expenditure but only 44% of total expenditure.

The basic per pupil rate used in determining recognized expenditure has three components: a base amount, a special education amount and a "pooling" amount to compensate for changes to the local commercial tax base. In 1992 the base amount per pupil is \$3954 per elementary pupil and \$4886 per secondary pupil. The special education amount is \$283 per elementary pupil and \$210 per secondary pupil. The amount per pupil for "pooling" is \$48 at all levels (Toward Education Finance Reform).

In addition to the basic per pupil grants the province pays board-specific grants and program-specific grants. The board-specific grants cover 100% of recognized costs for conditions such as distance from sources of goods and services, small classes, small schools and small boards, and needs created by socio-economic conditions of the population served. Program-specific grants are provided to extend programs and services into areas that respond to local needs and to meet provincial priorities. These include grants for Native-as-second language courses and for isolated boards.

The estimated number of pupils enrolled for 1992 is approximately 1,976,000 including junior kindergarten pupils. Pupils are enrolled with 172 school boards operating 4,766 schools. Expenditures on these students is approximately \$14 billion.

Individual school boards report their expenditures to the Ministry annually through financial statements and schedules prescribed by the Ministry (1991 Financial Statements and Schedules).

The current model for funding education in Ontario was developed in 1968 and is seen to no longer adequately address the principles of equality of educational opportunity for all pupils and equality of tax burden among local ratepayers. **A new funding framework is being developed under the Education Finance reform Project started in September of 1991.** This project is proceeding to develop a new funding model based on the principles of equity, adequacy, accountability, flexibility and cost-effectiveness (Toward Education Finance Reform).

## **2.0 Special Education:**

### **2.1 Approach to Special Education**

Programs and services for all pupils in Ontario are provided in accordance with the requirements of the Education Act and with stated principles and goals of education. These principles and goals are described in a 1984 special education manual and in various policy circulars.

Under a 1980 amendment to the Ontario Education Act, since 1984 a school board must identify and provide (or buy) service for "exceptional pupils". An "exceptional pupil" means a pupil whose behavioral, communicational, intellectual, physical or multiple exceptionalities are such that he is considered to need placement in a special education program by a committee established by the board under the Act. This includes all pupils whether low cost/high incidence or high cost/low incidence.

**"A special education program means, in respect of an exceptional pupil, an educational program that is based on and modified by the results of continuous assessment and evaluation and that includes a plan containing specific objectives and an outline of educational services that meets the needs of the exceptional pupil"** (extract from a 1984 special education manual from the Ontario Ministry of Education).

## 2.2 Types and Incidence of Special Needs

The following exceptionality groupings are described in regulations and the above mentioned special education manual:

a) Behavioral exceptionalities

socially maladjusted and/or emotionally disturbed

b) Communication exceptionalities

- autistic
- hearing impaired
- learning disabled
- speech and language impaired

c) Intellectual exceptionalities

- gifted
- educable retarded
- trainable retarded

d) Physical exceptionalities

- visually impaired
- orthopaedic and/or physically handicapped

e) Multiple exceptionalities

multi-handicapped

In the 1990-91 school year 100,000 out of 1.9 million pupils or approximately 8.0% of students enrolled in schools run by school boards were identified as "exceptional pupils" coming under the above groupings. An additional 4700 pupils were served in care, treatment and correctional facilities. In schools run by school boards the percentage of exceptional pupils in each category were: 48.2% learning disabled, 21.1% gifted, 10.1% educable retarded, 5.9% behavioral, 5.5% speech and language impaired, 3.8% trainable retarded, 3.0% multi-handicapped, 1.6% hearing impaired, 1.3% autistic, 0.9% orthopaedic and 0.5% visually impaired, (1990-91 Key Statistics, Elementary and Secondary Education in Ontario).

100.

### **2.3 Identification, Placement and Services**

At the request of the pupil's parent or upon notification to a parent an IPRC (Identification, Placement and Review Committee) is convened to review an educational assessment of the pupil, identify the pupil's need and make an appropriate placement. The IPRC shall interview the parent of the pupil and, with permission of the parent, may interview the pupil or obtain a health assessment from a qualified practitioner. Generally the options for placement are: integrated class, resource withdrawal, special class or a "provincial school". In this context a "provincial school" means a school run by the Ontario government for blind, deaf or learning disabled pupils.

### **2.4 Financing of Education**

Provincial grants for "low cost" and "high cost" pupils consist almost entirely of a block grant based on a general per pupil amount for special education used in the calculation of recognized expenditure under the general funding formula (1992 rates of \$283 per elementary pupil and \$210 per secondary pupil). In addition the province provides direct services to deaf, blind and some learning disabled pupils. Where a school board provides services to blind or deaf pupils it receives additional funding for salaries and benefits for specialist teachers and teacher-aides.

School boards are funded on a calendar year basis. Grants are announced early in the year and, within a month, they submit to the Ministry their budget estimates in a prescribed form with revised estimates being submitted in October. The financial statement of actual expenditures for the previous calendar year is required by March 31.

Pupils are funded from age 4 (in junior kindergarten) to age 21.

Special education expenditures represent approximately 6% of total expenditures for Ontario school boards. However, expenditures in this category tend to be under reported due to the practice of integrating exceptional students with regular classes

### **2.5 Participation of Other Ministries and Agencies**

The Ontario government has various programs and services for disabled persons some of whom may be "exceptional pupils", both "low cost" and "high cost". Most services to children are provided by the Ministry of Community and Social Services and include developmental services for children.



handicapped children's benefit and children's mental health centres (Inventory of Ontario Government Programs and Services for Disabled Persons, 1986). There are also care and treatment centres across the province operated by Ministries other than Education with the teachers being paid for by the Ministry of education. (These are listed in the general legislative grants regulations).

**There is a recent (1985) innovation of ISNC (Integrated Services for Northern Children).** This program involves inter-ministerial management committees in each of the major areas of Ontario's north (Northwest, Northcentral and Northeast) with committee representation from the ministries of Education, Health and Community and Social Services. Prior to this innovation MCSS delivered assessment and intervention services for children with social, emotional and behavioral needs through approved children's agencies in the North, mostly children's mental health centres. The Ministry of health, through hospitals and community-based programs, also provided specialized assessment and intervention services for children with speech, language and physiological problems. The Ministry of Education through its regional offices and boards provided for a range of special educational services including speech and language correction. The primary functions of these three area-committees are to review unusual cases and to coordinate specialized assessments for children with special needs. **This new coordination was made necessary by the shortage of professionals available in Northern Ontario and the small but widely dispersed population.**

## **2.6 Future Trends and Issues**

- Integration is a trend. Gifted and learning disabled groups are not inclined to support integration.
- Grade 9 may disappear.
- Fiscal restraint has led to cut backs in services to special needs pupils as boards are reducing some specialist services they are not mandated to provide. Psychologists, speech and language therapists and classroom assistants are particularly affected. Staffing ratios are now very unstable.
- Residential schools versus complete integration for deaf pupils is an issue.
- Fetal alcohol syndrome (FAS) has become a concern.

### 3.0 DIAND Ontario Region Office

#### 3.1 General Approach

- There are approximately 17,500 Indian pupils in Ontario with 7,300 in band-operated, 2,000 in federal and 8,200 in provincial schools.
- The regional office does not collect data annually on the numbers of students with exceptionalities but a 1989 study completed for the regional office indicated an incidence rate of 10.4% among pupils in band and federal schools. This is compared with an incidence of 7.8% in provincial schools. Definitions of exceptionalities are the same in almost all respects between provincial and DIAND funded schools. However, the count of exceptional students in band and federal schools included a category called "situational" which accounted for 18% of the exceptional pupils identified in those schools (Survey of Native Students in Special Education, Educational Clinic, University of Western Ontario Survey, April, 1989). This category refers to:
  - pupils who are severely age/grade retarded by reason of extended absence from school
  - pupils who are severely age/grade retarded due to inappropriate or ineffective modes of instruction
  - pupils who are severely age/grade retarded due to environmental factors such as poor nutrition, insufficient sleep over time, socialization differences, self discipline, motivation, etc..

(Ontario Region Special Education Handbook, Ontario Regional Office, 1986). Excluding the "situational" pupils the incidence rate in federal and band schools was 8.5% which is similar to the incidence in provincial schools. Aside from the "situational" category the 1989 study noted several other categories where the two groups differ. It was noted that the federal/band population has a higher proportion in the behavioral, hearing impaired, speech/language and multi-handicapped categories and lower ones in the learning disabled, gifted, educable and trainable retarded. Several reasons for these differences are suggested in the study.

The region uses a "cascade model" which describes a continuum of services (Regional Office Special Education Handbook). This model applies to all levels of exceptionalities. It applies to federal schools and is strongly recommended for band operated schools. Application of this model identifies the need for special education support services for some pupils.

The region has developed special education procedures for DIAND schools which are similar to the IPRC process in provincial schools. It is assumed that

band-operated schools are following them. Some bands tie their procedures to school board procedures. The procedures developed by the regional office are based on the "cascade model" which provides further steps and options for students who are more difficult to serve than others.

Applications for extra or "incremental" funding for exceptional students are received from the school by the DIAND district office before being forwarded to the regional office for approval. Each application must be accompanied by an individual student assessment which must be updated each year. Generally, funds are provided on a first come first served basis. For students attending provincial schools the DIAND regional office pays directly to the school board or through the band, depending upon the board's agreement with the band.

Band schools contract specialists to do individualized assessments and special education consultations for specifically identified students. Federal schools contract with individuals and provincial schools to obtain these services.

Health and Welfare Canada provides nursing stations, clinics and hospitals accessible to on-reserve Indians. Off-reserve Indians utilize provincial health facilities. Off-reserve Indian children in Northern Ontario also receive services under the provincial program of Integrated Services for Northern Children (as described under the Ministry section).

The Ontario Ministry of Community and Social Services (MCSS) provides some services under a cost share agreement with DIAND Social Development. Under this agreement the province provides some of the same social services on-reserve as are available off-reserve (eg. child welfare programs, programs for abused children), with most of the costs being reimbursed by DIAND..

Health and Welfare Canada does not provide speech pathology services and behaviour testing, which some feel it should provide.

There are 10 tribal councils which provide "second level" services (including some special education services) to band schools operating under the council.

Expenditures for low and high cost education are not reported by category in audited financial statements provided by bands. DIAND district office and then the regional office received the audited financial statement in conformance with the agreement with the band. The statements usually report expenditures by grant category with education being one category. A breakdown of expenditures within the education grant category is generally not available. Similarly, categorical expenditures for native students receiving special

education services in provincial are not available. (A financial statement may not be released without permission of the band.)

### 3.2 Indian Students in Provincial Schools

Indian students who have exceptional needs and who are enrolled in a provincial school have actual costs paid to the school board, either directly or through the Indian band.

### 3.3 Indian Students in Band Schools

An amount is included in the basic per pupil grant paid for each pupil enrolled in a band-operated school. This basic per pupil amount for 1992/93 consists of a student base amount of \$3740 plus an "incremental student allocation" of \$403. The basic amount for special education is not identified separately in these amounts. Although the terms "high cost" and "low cost" are not used in the region, identification procedures are the same for exceptional pupils in all categories. Extra funds are provided for the incremental costs of exceptionalities which are generally:

A. **tutor/escort** for a severely handicapped student (sometimes for 2 or 3 students) in a regular classroom; or

B. **withdrawal classroom** costs which may include:

- a tutor/escort for a severely handicapped student,
- classroom assistant,
- lower P.T.R.

(Withdrawal classroom costs are generally provided only to the larger schools, ie. with 300-350 students.)

"Exceptional resourcing" students are usually provided with a tutor/escort to enable them to function in a classroom or school environment. The tutor/escort ensures the pupil is comfortable, tutors the individual, helps the individual with seat work and works with the individual on a special modified program. This tutor/escort differs from a "classroom assistant" which is not restricted to special education, works with groups of students and takes part in class instruction. The annual funding provided for a tutor/escort falls in the range of \$18,000-25,000 each for an average of approximately \$20,400.

For the self-contained classroom incremental costs are calculated by taking the cost of the self-contained classroom (that are approved by a review in the district office) and subtracting the funds that are generated by the funding

formula for the number of students in the self-contained classroom. Due to the Department's promotion of a policy of mainstreaming there are very few schools in the region that have a large enough population that could consider a full time self contained classroom environment (Regional Office memo on High Cost Special education and Self Contained Special Education Classrooms, dated 21 June 1991).

### **3.4 General Trends and Issues**

- Adequacy of funding for high cost students.
- Culturally appropriate assessment tools are needed.
- Over-identification and mis-identification. Criteria are needed to identify children in some categories such as "situational". There also appears to be a lack of identification of gifted students.
- Limited accessing by band operated schools of special education support services.
- Lack of consistent policy and policy application across the region with respect to high cost funding. Four district offices treat similar cases differently as a result of flexibility in the guidelines. This may be contributing to high identification levels.



## QUEBEC

### 1.0 Provincial Context

Elementary school normally covers six years and secondary 5 years in Quebec.

In 1990-91 per student costs in Quebec were 13% lower than in Ontario, compared to 27% higher in 1981-82 (Education Indicators, Quebec, 1992)

**Per pupil spending (only school board costs) in Quebec in 1990-91 was \$5,088.** Between 1981 and 1990 spending in constant dollars decreased by 3%, while the school enrolments decreased by 4%. (Education Indicators, Quebec, 1992)

There are also many subsidized private schools in Quebec (total enrolment of approximately 101,000-9% total student population). In 1990-91 they spent a total of \$432 million (\$4,724/FTE). Of this amount the province paid 58%, tuition fees 25%, service agreements with school boards 5%, and 12% donations. (Education Indicators, Quebec, 1992).

Full-time and part-time enrolments in 1990-91 in Quebec were:

- pre-school (4 years old)	6,842
- pre-school (5 years old)	82,862
- elementary	558,432
- secondary	398,082
<b>TOTAL ENROLMENT</b>	<b>1,046,208</b>

In 1991 full-time and part-time enrolments were 1,148,877 (Basic Statistics on ... Education, Quebec, August, 1992)

There were 199 school boards in Quebec in 1991-92.

School boards are very autonomous. They have guidelines and a general curriculum, developed by the Ministry, to follow. They are audited to assure they comply to their mandate.

**Education financing in Quebec is very complex based on many formulae that take account of various factors including:**

- enrolments at each of three levels
- isolation (distance)
- poverty (economically disadvantaged region)
- teacher salaries at local level

A bit more understanding of this very complex system of financing is presented

through an examination of some portions of one school divisions' budget calculations:

- avg. teacher salary/PTR = allocation per student (\$1,550-kindergarten \$2,790-primary, \$3,650-secondary)
- administration costs = \$275/student
- equipment = \$23/student
- separate sum for building operation and maintenance
- special education budget calculated through PTR for each category and number of recognized students (see below).
- small school and distance factor adjustment \$600/student  
(not possible to isolate second level service expenditures to any greater extent)

**The provincial Ministry of Education funds well in excess of 90% of all global grant money to districts. The remaining, less than 10%, comes from local taxes.**

**The three broad categories by which education is financed are:**

- education services
- administration
- equipment

## **2.0 Special Education**

### **2.1 Approach to Special Education**

The law specifies that all students must be able to develop their individual potential and that all children of school age have a right to education services provided by school boards (La Réussite Pour Elles at Eux Aussi, Direction de L'adaptation Scolaire et des Services Complémentaires, Avril, 1992)

**The identification, placement and provision of special education is the responsibility of the individual boards.** The Ministry does not prescribe. It provides definitions and regulations to assist with identification, financing and categorization.

**Because of variations in interpretation from one board to the next in developing categories of special need, the boards are not required to categorize. Categorization is done at the ministry from the individual descriptive records.** This enables more precise funding to individual needs, but requires a detailed information base at the Ministry.

- Districts now like the category with associated funding approach because they can associate, funding with an individual, plan for it, and come back for more as an individuals needs change and as new students enter.
- Services are designed to meet individual needs.
- Individual boards are required by law to have a professionally prepared IEP for all high cost special needs students. Parent involvement is mandatory through a designated partnership environment.
- The new laws are designed to provide for service adaptation and not to prescribe a certain type of service.
- The province supports the provision of special needs education services in all locations, as much as possible.
- Provision of services in an integrated setting will continue to increase particularly in elementary. Integration is more difficult for learning disabled at secondary levels.

## **2.2 Types and Incidence of Special Needs**

- **Quebec has a system with 15 categories for special needs children:**

- minor learning handicap
- severe learning handicap
- behaviour disorder
- severely behaviourally and emotional disordered
- minor mental handicap with minor behaviour disorder
- moderately mentally handicapped
- severely mentally handicapped
- minor physical and mental disorder
- more severe physical and mental disorder
- developmentally handicapped
- visually impaired
- hearing impaired
- severely developmentally hearing impaired
- autistic
- severely developmentally psychologically disordered

Note: The terms are translated as literally as possible. For a full description of the categories and their interpretation refer to "Interpretation des Définitions des Élèves Handicapés ou en Difficulté D'Adaptation ou D'Apprentissage". (Quebec).

Information by category is collected at the board level and summarized by the Ministry.

In 1991-92 there were a total of 148,423 special needs students identified at all three levels; pre-school, primary, secondary. They account for approximately 12.9% of the total student population.

Of the above totals, approximately 14,000 (approximately 1.3% of the total student population) are considered more severely handicapped and high cost, while approximately 134,000 (12% ) are considered learning disabled or low cost (La Réussite Pour Elles at Eux Aussi, Direction de L'adaptation Scolaire et des Services Complémentaires, Avril, 1992)

They feel that rates of incidence are increasing for low cost categories of special education. They foresee that incidence rates will increase in behavioral areas, but not in other areas.

Estimates of the incidence of behaviour disordered children, for which special education services are required at some time, are between 3% and 6% (École et Comportement, Poliquin-Verville et Royer, Ministère de l'Éducation du Québec, 1992).

### **2.3 Identification, Placement and Services**

The provision of services is non-categorical. Boards are autonomous within guidelines for the special education services they provide. The province provides instructional guidelines for special education as they do for all other education programs (La Formation Générale des Jeunes: L'Éducation Préscolaire, L'Enseignement Primaire et L'Enseignement Secondaire. Instruction 1992-93).

To realize economies of scale, there are large region organizations comprised of area larger than any one board, that offer specialized education services. More and more, they are trying to have the same level of regional services available to smaller districts.

For the more severe cases education begins provision of services at 4 years of age. However, the age of mandated services is generally 5 to 21 years. Below this other Ministries address the needs. The qualifying age for special needs funding from Education will be extended down soon.

It is legally mandated that boards have a professionally prepared assessment and IEP for special education students.

Local committees comprised of special education students, parents and teachers have a prominent role in the provision of services at the local level. This is very compatible with a totally integrated non-categorical approach with emphasis on the student and the services.

There are no provincially prescribed methods or processes for identification. It is solely a board responsibility. The province provides the categorical definitions, their interpretation, the regulations and, very importantly, the guidelines and documents to assist the boards with identification. The province then does the final categorization from the professionally prepared board assessments and fund accordingly.

## 2.4 Financing Special Education

Supplementary grants for special education funding are available under a pupil/teacher ratio formula, as follows:

	<u>Kind.</u>	<u>prim.</u>	<u>second.</u>
- minor learning handicap	1/32	1/24	2.06/21.5
- severe learning handicap	1/32	1/12	2.06/21.5
- behaviour disordered 1/16	1/8		2.75/21.5
- severely behaviourally and emotionally disordered	N/A	1/8	2.75/21.5
- minor mental handicap with minor behaviour disorder	1/32	1/12	2/21.5
- moderately mentally handicapped	1/16	1/8	2.75/21.5
- severely mentally handicapped	1/7	1/3.5	7.96/21.5
- minor physical and mental disorder	1/12	1/8	2.75/21.5
- more severe physical and mental disorder	1/12	1/6	3.66/21.5
- developmentally handicapped	1/12	1/8	2.75/21.5
- visually impaired	1/10	1/4	6.6/21.5
- hearing impaired	1/10	1/4	6.6/21.5
- deaf-mute	1/10	1/5.2	4.48/21.5
- Multiply handicapped 1/12	1/6		3.66/21.5
- autistic	1/7	1/4	5.24/21.5
- severely developmentally psychologically disordered	1/7	1/4	5.24/21.5

The above ratios compare to the regular ratio of 1/24-primary and 2.06/21.5 secondary (although in practice these ratios may vary).

The funding that is received is calculated by applying the above ratio to the number of recognized special needs cases to determine the number (or



fraction) of teacher positions that are recognized for each category of need and applying the number(s) or fractions of positions to the average teacher salary for that district. Using a weighting method, additional expenses (materials, etc.) are factored in for some special needs categories.

**For low cost special education, funding is based on one additional professional staff per 17 regular professional staff in primary and 2 to 21.5 in secondary.**

NOTE: see attached "annex II" for estimated average per student expenditures on special education, by special needs category for 1988-89.

With integration, the student teacher ratio for high cost cases is lower. Therefore, there is a saving on professional staff that can be applied to other special needs students.

## **2.5 Participation of Other Ministries**

There are agreements with other agencies such as Health and Social Services to provide complimentary services. This can include a school nurse or social workers.

Very specific services such as a physiotherapist for more severe cases are provided through Ministries other than Education.

## **2.6 Future trends and issues**

The reduction of students dropping out of school (all students who leave school without receiving a diploma) will be a Ministry priority over the next few years (Education Indicators, Quebec, 1992). There is a special Ministry unit on this topic with \$40 million allocated for projects.

**The trend is to go in the direction of total integration without categories, but more important is the move towards services that meet needs.**

In approximately two years, they will be going away from the need for individual records and categorization at the Ministry level as incidence rates become well stabilized (for smaller districts more specific measure may continue to be necessary).

**They are looking at moving toward a less complex system for financing education.** The need to continuously control board declarations and submissions is too complex.

### 3.0 DIAND Quebec Region Office

#### 3.1 General Approach

In the Quebec region there are 245 Indian students in federal schools, 1,782 in provincial schools, 260 in private schools and 5,002 in band schools as of Jan. 1992.

They apply the budgets that are set by HQ formulas for the province and feel limited in that they only have so much to spend.

**There is concern that high cost special education funding may not be adequate under the funding formulae set at HQ.**

Regionally, they provide approximately \$200 per student to the Quebec First Nations Education Council for curriculum development.

Additionally, the first nations education council receives \$7,700 for each member community. Some communities that are not part of First Nations Council also receive the funds directly.

There are three major Indian groups in Quebec. Inuit- 25% in DIAND schools, 75% in provincial schools; Cree-75% DIAND, 25% province; Naskapi-75% DIAND, 25% province.

There are no DIAND Indian curriculum services except for those provided through formula funding. Prior to 1986 there were.

**All second level services for Indian education come from the community through the funding formulae.**

**Identification is primarily through the health system for pre-school children and through the schools for the less visible cases. Professionally prepared assessment are required for high cost cases.**

Additional services for special education, pre-school and in-school, are provided by Health and Welfare Canada and Social Services.

Some funding that goes into education occasionally comes from other internal region budgets (global budget approach).

Region did a student transportation study and funds transportation through a budget separate from school operations.

### 3.2 Indian Students in Provincial Schools

**Funding for on-reserve Indian students is provided to the province, as invoiced, to cover all costs for an education comparable to that received by provincial school students.**

The province submits a bill to Diand for the education of on-reserve Indians in provincial schools (There is an outstanding claim of approximately \$43 million charged to DIAND by Quebec, that DIAND does not recognize as an education cost).

Funding for 92-93, for example, was additional to the \$27 million for band school education. There are three Indian groups who are funded by agreements (James Bay Convention) separate from HQ formula money.

For private schools, region pays what is billed, but not more than provincial school costs.

### 3.3 Indian Students in Band Schools

**The Quebec region formula for band and federal schools as of 1989 recognizes more strongly than before, the following:**

- curriculum adaptation
- native languages
- second language instruction
- administration costs
- geographic location of schools
- small schools factor
- special needs education

(The first four are funded at a rate of 22.5% of the instructional amount. See "Politique Régionale en ce qui a trait au Financement des Écoles Fédérales et de Bandes".)

**In 92-93 the national formula provided \$27,604,000 for band and federal school education in Quebec. Of that amount \$494,000 was for special education (high cost), \$110,000 for school evaluations and \$27 million was left to distribute.**

**In 1992-93 the following block funding applied:**

- K4 & K5-\$3,447 FTE
- primary-\$4,707 FTE
- secondary-\$5,303 FTE

This is further adjusted for each band for a geographical and small school factor.

The geographical factor is an extra 50% of the total funding formula (the numbers of FTE x block per student).

The small school factor is an index applied to the funding formula, calculated as follows:

- 1-100 students = .100
- 101-200 = .080
- 201-300 = .060
- 301-400 = .040
- 401-500 = .020
- 501 + = .000

Last year a total of \$1,000,000 was provided to band and federal schools for high cost special needs education. The \$1 million was comprised of \$494,000 from the formula, \$342,000 as part of the extra HQ national allocation, and \$164,000 from other region budgets.

High cost special needs education is funded on the basis of submitted and approved cases and not by categories.

- Low cost is not identified as a separate funding amount. It is part of the block.

### 3.4 General Trends and Issues

- They feel a need for more clearly defined policies for special education funding from HQ and the money to go with it.
- It was expressed that the \$1 million allocated in 92-93 to high cost special needs education is not adequate.

## NEW BRUNSWICK

### 1.0 Provincial Context

Municipal (property) taxes are collected by the province. Therefore, the full contribution for education comes from the province to the local school boards

**The approach to funding is primarily block, based on formulae.**

School boards do not have a right to tax for education services.

The per pupil amount in the block fund is equal across the province. The only differentiation is in the special needs block that will vary between \$280 and \$310.

There are three general divisions in government: Education, Social Services and Health. Education is given an allocation and then they decide how much will go for Ministry operations and how much to school divisions, after they decide the allocation between the Anglophone and Francophone programs.

The province has a parallel system for Francophone education, at all levels including the Ministry.

There are approximately 140,000 students in all provincial schools. Anglophone and Francophone.

Each district has a fair amount of autonomy on how they spend the money they receive. They get the funds and guidelines and do not have large bureaucracies. **Within the global budget there are two mandated things; special needs and library @ \$7.00/student.**

### 2.0 Special Education

#### 2.1 Approach to Special Education

The approach to special education is integration and non-categorical except for visual and hearing impaired. Those two categories are funded separately.

**Integration is mandated through legislation. 'Integration is a process whereby exceptional pupils are educated in neighbourhood schools in age-appropriate regular classroom settings with their peers and are provided with programs and services based on their individual strengths**



**and needs."** (Active Life For Disabled Youth - Integration in the School Perner, D. E., 1991)

The philosophy is, "If exceptional students are to live and work in the same "normal" environment as their non-exceptional peers, a range of special services, special supports and special programs must be developed to meet their individual needs." (Department of Education, Working Guidelines on Integration).

Removal of a pupil from the integrated classroom setting occurs only when extensive individual program planning indicates that education in that setting, with support services, cannot meet the pupils education and social needs.

Some districts are ahead of others in the integration process and services for the exceptional students. The districts that are ahead are those who focus on the system as being the problem, not the student being the problem.

A regional approach with the other Atlantic provinces was historically used for the education of the visual and hearing impaired. There is rapid movement away from this to an integrated approach.

By legislation, the special education program is defined as being designed to meet the needs of an individual student and **the basis for the program and service must be the individual student.**

## **2.2 Types and Incidence of Special Needs**

**New Brunswick has a non-categorical approach. The only two categories with special recognition for funding purposes are hearing and visually impaired.**

**The block funds allocated for special needs education are intended to serve approximately 10% of the student population.**

## **2.3 Identification, Placement and Services**

**There is regional cooperation for certain types of special needs in the Maritime provinces (e.g. residential school for the hearing impaired in Amherst). With more program integration, the need for this is becoming redundant.**

**Have home programs for at risk drop-out students.**

**Presently funding begins at age 3 for high cost special needs children. This will change to 5 years next year with Social Services assuming responsibility between 3 and 5 years.** Regardless of who pays the bill, they will receive the necessary services (Department of Education, "Working Guidelines on Integration", refer to this document for details on special education programming and services, financing, placement, and shared service areas )

Students drop-out of the education system at 21 years.

Identification is with the health system for early more visible cases. Some pre-school screening through the public health system also identify special needs students. Other variables, such as socio-economic, are examined to identify at risk children.

**An interdisciplinary team has responsibility to collect, interpret and report information for evaluation and program planning for children with special needs.** The core group of the interdisciplinary team is comprised of a psychologist, a nurse, a social worker and an academic diagnostician. One of the main functions of the team is to alleviate pressure on parents who would otherwise have to approach the numerous agencies and resources (Definition of an Interdisciplinary Team).

To enable exceptional children to live and work in the same environment as their non-exceptional peers, a range of special services, special supports and special programs must be developed to meet individual needs. These may include curriculum modification, different evaluation procedures and teaching methods, alternative assignments and materials, resource room programs, adjusted timetables and physical classroom modifications.

**With integration, the regular classroom teacher assumes a lot of responsibility and must feel they are part of a larger team in this endeavour.**

Some school districts are too small to have access to professionals that are necessary to keep certain exceptional students in an integrated setting. therefore, **there are 7 shared service areas in the province**, with each having a person whose task it is to assist school districts with integration of exceptional students. (Department of Education, Working Guidelines on Integration).

## **2.4 Financing Special Education**

**Funding for special education is at an average of \$300 per student (all students) per year, for all categories except visual and hearing impaired. The**

average ranges from \$280 to \$310/district based on historical information and needs higher in some districts than in others.

Approximately \$5 million per year is spent on the hearing and visually impaired.

With all of the special grants, there is approximately \$45 million that is spent in the province on special education (equates to approximately \$325 per student).

Eighty-five percent of the special education funding in the block goes for resource teachers, teaching assistants and for professional development and support.

The province added an extra \$61 million over 4 years for excellence in education. Some of the extra "new" money goes for special needs such as integration and behaviour disordered students.

## **2.5 Participation of Other Ministries**

Health and Social Services work as a team with Education for the more severe cases at an early age (3).

New Brunswick is moving to a system where Social services will pick up the cases from ages 3 to 5.

**At Education Ministry, in partnership with other ministries, primarily Health, they provide support services including: psychologists; speech pathologists; social workers, and health and community service workers.** Very little funding for these services is done at the district level.

## **2.6 Future trends and issues**

They are very intensively in a process of non-categorization and full integration. The process is mandated legislatively.

### 3.0 DIAND Atlantic Region Office

#### 3.1 General Approach

At the level of the regional office, funding for special needs students is differentiated, but there is no specific continual amount. **Funding is on a case by case basis.**

There are three federal schools in the Atlantic region, but they are all very small (one is only a kindergarten-K4, one is k4-6, and the other k4-9)

**Approximately 50% of on-reserve Indian students attend provincial schools.**

In New Brunswick there are no high schools on reserves. Nova Scotia has one.

**Region does not have a specific policy or approach for funding special needs students, because there are too many provinces involved.**

**Funding for high cost special needs students is done on the basis of a professionally prepared psychological-education assessment, including review process, programming and costs, and is submitted by the community.**

Identification of special needs students occurs primarily through expressed concerns from educators and through more obvious visible exceptionalities. **Testing and IEP preparation is purchased out of the band allocation** supplementary funding comes next.

There is very limited work done on curriculum through region and bands, because there are no economies of scale. On a project basis, there has been some funding from other sources (Native Council of Nova Scotia) for special materials (tapes, books). DIAND has occasionally put in limited funds for special projects in this area.

There are no second level services from region in the area of special needs education.

**Education funding for special needs students does not occur prior to K4.** The cut-off of 21 years of age is as stipulated by the province.

**There are no low cost funds specifically earmarked for Indian students attending band or provincial schools. It's up to them to decide on programs from the allocated per pupil funds. This can be through special programs and teachers, aids, or lower pupil/teacher ratios.**

The 1992-93 education budget is:

- total sum band operated:	\$ 9,712,881
- total sum provincial:	11,961,284
- total sum federal:	628,039
- boarding:	12,000
- transportation:	2,342,700
- student financial assistance:	129,200
- guidance counselling:	839,000
- education instruction support:	397,092

The guidance counselling total is based on a rate of \$195.00 per student for all schools, all students (minimum \$5,000/band).

Some bands on a project specific basis receive funds from the education budget for cultural education projects (92/93 2 bands: total \$34,267). Additionally, all bands, regardless of where students are enroled, get \$130/student, enroled in grades 9-12, for financial support (spending money).

Bands whose students are in provincial schools receive \$100/student for supplies, books, etc.

School committees, other than for band operated schools, are funded at \$600 per committee.

### 3.2 Indian Students in Provincial Schools

There are 2,086 students in provincial schools.

**The average tuition per student is approximately \$4,679**, ranging from a low of \$3,864 to a high of \$5,127. In New Brunswick the funds are paid to the province and in Nova Scotia the funds are paid to the band.

**There are no standards of costs for special needs students. Region pays the costs as assessed by the provinces and the approach in each of the provinces differs.**

There is a master agreement in place between New Brunswick and Canada. Because the province collects the municipal taxes, DIAND pays one flat rate for attendance, with no need to match a local tax contribution.

One of the results of the New Brunswick full fare going from the province to the boards is that the boards bill DIAND extra for all sorts of things (texts, field trips, equipment), saying the funding for identified specific things is not



provided sufficiently by the province.

**Region sets an ancillary budget of approximately \$2 million per year. From that \$1,000 per student (unique to this region), to a maximum of \$150,000 per band is allocated to the band to assist Native Indian students and those responsible for them to provide transition and support services. The band decides how to spend this money within the mandate of helping meet the needs of the students. At the discretion of the band some second level services are provided from this ancillary funding. Funding can include liaison, Indian teacher, tutoring, and special library materials.**

**For the provincial schools, \$500,000 is set aside to assist with high cost special needs students. Region pays the funds to the bands and the bands manage the funds by entering into an agreement with the school board.**

Unit costs with provinces do not include a component for high cost special education, this comes on a per case basis. Unit costs do include provision for the same level of low cost special education services that are provided to provincial students.

### **3.3 Indian Students in Band Schools**

Total enrolment in band schools is approximately 1,629 students.

**Unit cost averages \$5,713, but ranges from a low of \$4,000/student to a high of \$11,900/student.**

The unit block amount (based on last year budget plus 4.5%) includes all instructional services including administration and most second level services. Additional items that are recognized and budgeted separately include:

- special education (case basis for high cost);
- student accommodation (as negotiated where necessary);
- student transportation (last year budget plus 4%);
- student financial assistance (grades 9-12 \$130/student);
  
- guidance and counselling (\$195/student); and
- school committee (\$600 per committee).

The condition for band education funding is that they are responsible for providing a level of education such that the students can transfer without penalty.

Band schools generally follow the provincial curriculum, with some adaptation for native culture. Core curriculum is provided at no charge from the province

From the total education budget, \$250,000 is skimmed off the top to pay for high cost special education in band operated schools in the Atlantic Region. The funding on a priority basis goes to those with the largest expressed need. The \$250,000 is based on historical patterns. This pays the education costs. Other needs are paid for through Health.

Region has approximately \$12.5 million for band school education. The per pupil allocation is calculated as nominal role x last year unit cost - all other fixed costs (\$250,000 special needs, \$100,000 school evaluations, etc) = remainder which determines the price increase for this year.

### **3.4 General Trends and Issues**

Personnel at region feel that if there was a set policy and approach for funding special needs students, there would be more requests. This suggests that not all special needs students are getting the required services.

Region personnel express a need to have HQ clarify funding for special education.

Amount of funding for high cost special needs appears to be growing and can't be predicted because of the relatively low number of cases and the extreme associated cost variations. Region feel they need more flexibility from HQ to deal with this.

## NOVA SCOTIA

### 1.0 Provincial Context

The entire education system is set by the province.

In 1989-90 there were approximately 165,000 FTE students enrolled in provincial schools in 21 school districts.

Total education expenditures were \$698,890,452 in 1990 or approximately \$4,217/FTE.

**In 1991 the estimated operating expenditures cost per pupil averaged \$4,351** (Statistical Summary, Dept. of Education, Sept. 1991)

Across the province the ratio of administrators FTE (certified teachers) to teaching staff FTE was 1/12.8 in 1991.

The average PTR as of Sept. 30, 1991 was 15.9 (includes all educational professional staff, for example, superintendents and principals). The average teaching class size was 22.9 (elem.), 21.5 (junior), 22.8 (senior).

In Fiscal April 1, 1992 to March 31, 1993, operating grants to school boards exclusive of funding for debt service charges on school construction, will amount to \$566.2 million. Total education expenditures for the same period are estimated at \$787 million. (District School Board Funding 1992-93). Note: this excludes the municipal tax share.

**In Nova Scotia, 80% of education is funded by the province and 20% is funded by the municipality to the boards. The boards have limited control over the 20%. Some larger boards go to their city to ask for tax payers to pay more than the equalized education tax rate of \$39 per \$100 assessment.**

Boards get block funding in a global budget and have discretion over expenditures, within guidelines.

The school act in Nova Scotia says boards have a responsibility for services to physically and mentally handicapped children, but does not say anything about other exceptionalities. However, their policy statement covers other exceptionalities.

**Education funding is calculated as follows:**

- number of weighted student units (weighting is 1.0 grades p-6 and 1.2 grades 7-12) x \$2649 x two factors to assist boards with higher than average teacher salaries and operation of designated schools. Additionally there is a further 2% increase for boards with enrolments of less than 6500 (District School Board Funding 1992-93).
- from above subtract municipal support amount at education tax rate of 39 cents per \$100 of uniform assessment.
- add \$75,000 for all districts to assist with salary adjustment in 92-93.
- boards designated as operating isolated or distant schools get \$200,000
- \$425,000 is then added for every district school board as a district management grant to assist with central office administration expenditures
- school boards designated as operating isolated or distant schools receive a further \$200,000.

## **2.0 Special Education**

### **2.1 Approach to Special Education**

**A principal education objective is to maximize strengths of all children regardless of exceptionality.**

Special education at the ministry level is emerging rapidly. The Special Education Division in the Department is new as of the fall of 1992.

Budget restraint has put pressure on special education services. One result is the relatively long wait to get some services, such as assessment services.

The direction of services is integration with a strong emphasis on quality programming.

"Programs and services for exceptional students may be provided through a variety of school settings, according to the needs of the students. The above labels (categories in following "types" section) should not be used as descriptors for individual students. Student strengths and needs are used to develop appropriate programs and labels should be used only as administratively necessary for funding and data collection purposes." (Administration of the Special Education Grant to School Districts)

**"... most students who require special education services can have their needs met in the regular classroom...** This integration can provide the greatest degree of educational opportunity for most students with exceptional needs... The issue no longer is whether most students with exceptional needs should

or should not be integrated, but what support is needed for integration to be successful." (Statement on Integration, Department of Education nov. 1991)

From time to time instruction for students with exceptional needs may best be delivered outside the regular classroom. Parental involvement and consent is required for all aspects of services including identification, professional assessment (individual diagnostic, psychological and/or educational assessment), program planning, placement, and evaluation.

## **2.2 Types and Incidence of Special Needs**

**The funds provided through the special education grant shall be used to provide programs and services to students who are assessed as having any of the following exceptionalities, if the student's needs cannot be met through the regular programs and services:**

- cognitive impairments
- emotional or behavioral disorders
- learning disabilities
- physical disabilities and/or other health impairments
- speech impairments and/or communication disorders
- sensory impairments - vision, hearing
- multiple disabilities
- intellectually gifted

Students with severe vision and Hearing impairment are funded separate from the block through the handicapped persons Act and the Atlantic Provinces Special Education Authority.

It is intended that the above not be descriptors for individual students but rather that strengths and needs be used to develop appropriate programs. (On this basis, the best explanations and definitions are found in two documents. "Administration of the Special Education Grant to School Districts" and Directions for Completion of Special Education Questionnaire.")



Incidence is measured, through a board reporting format for special needs students and programs. In 1989-90 incidence rates were as follows:

- educable mentally handicapped	1,655 students (1.0% of total enrolment)
- trainable mentally handicapped	431 (.26%)
- physically handicapped	198 (.12%)
- multi-handicapped	188 (.11%)
- behaviour/emotional handicapped	759 (.46%)
- speech language impaired	4,774 (2.9%)
- specific learning disabled	4,530 (2.75%)
- unspecified learning problems	7,140 (4.33%)
- sensory impaired vision	148 (.09%)
- sensory impaired hearing	177 (.433%)
<b>TOTAL</b>	<b>20,000 (12.13%)</b>

### 2.3 Identification, Placement and Services

The ages exceptional children must be served in the education system are 5 to 21 years.

Some larger boards do pre-school screening, relatively informal. Most of the identification will occur through the public health system. The pre-school screening will involve vision and hearing, speech/language pathology and possibly some basic academic skills.

As in other provinces, larger jurisdictions tend to attract more exceptional children because of better all-round service levels through economies of scale and better non-education support services.

"School boards are responsible for the identification, assessment, placement (level and location of a program), education programs and monitoring of progress of children with special needs." (Policy Statement on Special Needs Placement, Dept. of Education, Nov. 1988)

"No child may be placed in a special class or program without the consent of the parents or guardians." (Public School Programs, 1986-87. 1987-88)

Smaller districts rely on health services to do psychological assessments. There is no charge but the wait can be long. The reason for this is the funding does not include assessment services.

Behaviour disorders are not covered by legislation.

There are segregated schools for more severe cases of exceptionality: Atlantic Province schools for the visual and hearing impaired, a residential school for the severe learning disabled, and another day school for the severe learning disabled.

## 2.4 Financing Special Education

Funding is not by category, but boards are told the eight categories they are expected to serve with the special needs block funds.

Charges against the special education grant can include:

- persons to direct, implement and evaluate;
- special class teachers;
- resource teachers;
- school psychologists and educational assessors;
- speech and language pathologists;
- paraprofessionals;
- secretarial and clerical in support to the above;
- travel costs for personnel; and
- specialized educational equipment and materials.

**The special needs block funds are not global, they are designated and must be spent on special needs education. Boards often will supplement this block with additional funds.**

**For 1992-93 the special education non-global grant is the lesser of the actual cost of approved special education programs and services or \$215, multiplied by the boards total funding enrolment (not just special education enrolment) and by the salary weighting factor for the school board. This funding is to cover both high cost and low cost cases. As mentioned, this amount is supplemented by a local contribution and often by funds from the global budget.**

Between 1982 and 1988 there was a 76% increase in special education funding, but, even within that, budgets and consequent availability of some special education services are difficult to come by (over that same period funding for all education increased substantially-operating cost per pupil [all costs] in 1991 were 174% of 1982 levels).

For high cost cases there is generally one aid per pupil. A tendency may be to have fewer teachers and more teaching assistants to run the programs for exceptional children. This will necessitate a closer look at standards for paraprofessionals.

In 1990 special education expenditures were \$46,216,799 or \$278.84/FTE. Of that amount, provincial funding accounted for \$36,384,321 or \$219.53/FTE (Special Education 1990 Budget).

Total expenditures on special education in Nova Scotia were \$50 million in 91-92. Of that amount, \$38.6 million came as designated from the province. The remainder was added by boards.

## **2.5 Participation of Other Ministries**

Ministries of Health and Social Services have responsibility for special needs children before the age of 5.

There are children's training centres in several locations for children who require special care (severe cases). They are funded by Social Services, but are now being phased out with a transfer to the integrated school setting.

"Small Options Homes" and larger institutions for more severe cases are under Social/Community Services; education does not assume costs unless they are in the school (this results in a bit of a conflict over who is responsible for education services).

The Department of Health works cooperatively with aids and other personnel in providing advice and assistance for in-school care of pupils with special care needs.

## **2.6 Future trends and issues**

While integration is considered the direction, quality programming to provide the needed support for integration is a major concern.

They feel programming is the major issue that will define the success of integration and special needs education.