

Letter of Understanding on Classroom Complexity and Student-Teacher Ratios (STR)

Bargaining Between
The Alberta Teachers' Association
and
The Teachers' Employer Bargaining Association

Effective September 1, 2025

1. Purpose

This Letter of Understanding establishes a province-wide framework to ensure that classroom conditions are safe, manageable, and aligned with the educational needs of Alberta's diverse learners.

The framework:

1. Defines phased-in student-teacher ratios (STR) weighted for complexity;
2. Requires spring planning and pre-September 30 verification to ensure staffing and class configurations align with projected enrolment and complexity; and
3. Provides a tiered appeal process for circumstances where actual class composition exceeds prescribed STRs, even after funding allocations are finalized.

2. Phased-In Student-Teacher Ratios (STR)

Effective Date	Division	Maximum STR	Notes
2025-09-01	Kindergarten – Grade 3	26:1	Weighted per Section 3, Weighted Complexity Factors; labs/shops capped at 24 students
	Grades 4 – 6	32:1	
	Grades 7 – 9	34:1	
	Grades 10 – 12	36:1	
2026-09-01	Kindergarten – Grade 3	23:1	Weighted per Section 3, Weighted Complexity Factors; labs/shops capped at 24 students
	Grades 4 – 6	29:1	
	Grades 7 – 9	31:1	
	Grades 10 – 12	33:1	
2027-09-01	Kindergarten – Grade 3	20:1	Weighted per Section 3, Weighted Complexity Factors; labs/shops capped at 24 students
	Grades 4 – 6	26:1	
	Grades 7 – 9	28:1	
	Grades 10 – 12	30:1	

Effective Date	Division	Maximum STR	Notes
2028-08-31	Kindergarten – Grade 3	17:1	
	Grades 4 – 6	23:1	Weighted per Section 3, Weighted Complexity Factors; labs/shops capped at 24 students
	Grades 7 – 9	25:1	
	Grades 10 – 12	27:1	

*In calculating the above STRs, only those teachers who are providing direct instruction to the students shall be used.

* Divisions would be required to make best efforts to comply with class size and composition requirements.

3. Weighted Complexity Factors

Category	Weight	Description
Typical learner	1.0	No identified additional supports
High-incidence / low-cost exceptionality	1.5	Mild/moderate disability, ELL, francization, or behavioural designation
Low-incidence / high-cost exceptionality	2.0	Severe or multiple disability, complex medical or behavioural needs
Refugee/newcomer (≤ 2 years in Canada)	1.5	Requires cultural and language transition supports
Gifted (Code 80)	1.25	Requires enrichment or individualized programming
Students receiving, or who ought to be receiving, targeted and/or individualized supports as defined by Alberta Education	1.5	Some families, especially those new to Canada, are choosing not to have their child assessed because of cultural stigmas, but the child still requires supports and intervention.

Divisions shall rely on Alberta Education student coding, as detailed in Appendix A, when determining complexity weightings.

4. Spring Planning and Pre-Funding Verification

1. Spring Forecasting

By May 31 of each year, each principal shall prepare projected class configurations for the

upcoming school year based on reasonably anticipated enrolment, identified student complexity, and program requirements.

Divisions shall use these forecasts to allocate certificated staff sufficient to achieve the weighted STRs in Section 2, Phased-in Student Teacher Ratios (STR).

2. Pre-September 30 Verification

Between September 1 and September 29, each division shall review and, where necessary, adjust the spring forecasts using actual registrations and updated complexity data.

Where projected weighted STRs exceed the maximums, the division must make reasonable efforts to reallocate staffing or adjust class groupings prior to September 30.

3. Funding Constraint

The Parties acknowledge that under Alberta Education's current funding model, once the September 30 enrolment count is submitted, divisions cannot obtain new funding for that school year.

Post-September 30 adjustments or remedies must therefore be achieved through internal reallocations, operational changes, or compensatory supports.

5. Division Resource Obligations

When a class exceeds its applicable weighted STR—whether during spring planning, pre-September 30 verification, or due to the addition of new students after September 30—the Division must, within five (5) operational days, take one or more of the following actions:

1. **Provide Additional Supports:** Assign educational-assistant hours, specialist teacher FTE, or other professional services.
2. **Adjust Class Structure:** Reassign or redistribute students within the school or program.
3. **Provide Temporary Relief:** Authorize release time or substitute coverage for planning, assessment, or case management.
4. **Document Non-Compliance:** Where no immediate remedy is feasible, provide written reasons and a plan identifying the date or method by which compliance or mitigation will be achieved.

The Division shall make every effort to meet the applicable weighted STRs.

6. Appeal Mechanism

Stage 1—Teacher Appeal to Principal

Trigger: A teacher believes that their class complexity—based on spring planning, pre-September 30 revision, or the addition of new students—exceeds the applicable weighted STR.

Process:

1. The teacher provides a brief written notice to the principal that details the non-compliance and suggests remediation using the action(s) specified in Section 5, Division Resource Obligation.

2. The principal reviews the concern and responds in writing within five (5) operational days, identifying actions or supports to be implemented.
3. If unresolved, the teacher may advance to Stage 2 within five (5) operational days of receiving the response.

Stage 2—Principal Appeal to Superintendent

Trigger: The principal or the teacher from Stage 1 determines that school-level resources are insufficient to meet the required STR or to mitigate additional complexity.

Process:

1. The superintendent (or designate) reviews the case within ten (10) operational days of receipt.
2. A written decision is issued within five (5) operational days thereafter, detailing the actions, reallocations, or timelines for remedy (where reasonably practicable, implementation shall be no later than ten (10) operational days after the decision).
3. If divisional resources are deemed to be insufficient, the superintendent shall proceed to Stage 3.

Stage 3—Division Appeal to *Education Act's* Complex Education Needs Tribunal (CENT)

Trigger: The division cannot, within its allocated resources, meet the required STR or provide adequate supports.

Process:

1. The division files its appeal within ten (10) calendar days of the Stage 2 decision.
2. The CENT's decision is binding on both Parties.

The procedures of the CENT are detailed in Appendix B.

7. Timelines Summary

Stage	Initiated By	Division Response	Maximum Completion Time
1	Teacher → Principal	5 + 5 days	10 operational days
2	Principal → Superintendent	10 + 5 days 10 + 5 + 10 days	15 operational for decision 25 operational days (includes implementation)
3	Division → Tribunal	10 days to file	10 calendar days

8. Protection of Teacher Time

Should the teacher be required to collect data, perform STR calculations, or attend meetings related to compliance or appeals, any such time will be added to the assignable time calculation.

All required information shall be drawn from existing division enrolment and coding records.

9. Transparency and Reporting

Each division shall publish by no later than the last operational day in December annually:

- Weighted STRs by grade group;
- Number and outcomes of teacher and school appeals; and
- Actions taken to mitigate complexity pressures.

10. Review

This Letter shall be reviewed by the Parties in spring 2027 to determine whether adjustments to ratios, timelines, or funding assumptions are required.

Appendix A: Student Coding and Complexity Weighting Reference

A.1 Low Incidence / High-Cost Students (*Weighted 2.0*)

Code	Description
41	Severe Intellectual Disability
42	Severe Emotional / Behavioural Disability
43	Severe Multiple Disability
44	Severe Physical or Medical Disability
45	Deafness
46	Blindness
47	ECS Severe Language Delay
48	ECS Moderate Language Delay

A.2 High Incidence / Low-Cost (Mild / Moderate) Students (*Weighted 1.5*)

Code	Description
10	ECS Developmentally Immature
30	ECS Mildly or Moderately Disabled (includes Mild/Moderate Intellectual, Emotional/Behavioural, Hearing, Visual, Communication, or Multiple Disability)

Code	Description
52	Moderate Intellectual Disability
53	Emotional / Behavioural Disability
54	Learning Disability
57	Communication Disability
58	Physical / Medical Disability
59	Multiple Disability

A.3 Additional Populations Considered Under Complexity Weighting (*Weighted 1.5 unless otherwise noted*)

Code	Description	Weight
301	Foreign-Born Student	1.5
303	English as an Additional Language (EAL)	1.5
306	Francization – Canadian Born	1.5
307	Francization – Foreign Born	1.5
640	Refugee Status	1.5
80	Gifted and Talented	1.25
	Students receiving, or who ought to be receiving, targeted and/or individualized supports as defined by Alberta Education	1.5

A.4 Additional Complexity Factors

Students shall also be included in complexity weighting where they:

- Present significant or persistent behavioural concerns that pose safety risks or continuous disruption;
- Receive or require Targeted and/or Individualized Supports under Alberta Education definitions;
or

- Are identified through local or external assessments as having learning or medical needs that materially affect instruction.

Such students shall be weighted at 1.5, unless professional assessment warrants a higher classification under A.1.

A.5 Continuity of Designation

1. A designation shall follow a student transferring between schools or divisions unless formally rescinded by Alberta Education.
2. The receiving school shall apply the existing code and weighting until re-evaluation occurs.
3. Students entering from outside Alberta with recognized special-education designations shall be temporarily classified at the equivalent weighting pending coding confirmation.

A.6 Safety and Capacity

In specialized settings (laboratories, shops, technical rooms), class enrolment shall not exceed the number safely accommodated by the facility under applicable safety standards and fire codes, regardless of STR calculations.

A.7 Review and Update

- This appendix shall be reviewed annually each June to confirm alignment with current Alberta Education coding.
- New or amended codes that affect student weighting shall be incorporated by mutual agreement of the Association and Division.

A.8 Summary of Weighting Framework

Category	Description	Weight
Typical Learner	No additional supports	1.0
High Incidence (Mild/Moderate)	Codes 10, 30, 52–59	1.5
Low Incidence (Severe/High-Cost)	Codes 41–48	2.0
Language / Cultural Support	Codes 301, 303, 306, 307, 640	1.5
Gifted and Talented	Code 80	1.25

Category	Description	Weight
Other Significant Behaviour / Functional Impact	Locally determined	1.5–2.0

Appendix B: Complex Education Needs Tribunal Reference

B.1 Statutory Authority

The Complex Education Needs Tribunal is established under Division 5 (Sections 30.4–30.7) of the Education Act, SA 2012, c E-0.3, as administered by the Minister of Education for the Province of Alberta.

This appendix summarizes the statutory duties, decision-making authority, and procedural expectations of the Tribunal as they pertain to appeals under Section 6 of this Letter of Understanding.

B.2 Establishment and Jurisdiction

1. The Minister may establish one or more Complex Education Needs Tribunals to consider matters referred by school boards under the *Education Act*.
2. The Tribunal's jurisdiction arises when a school board determines that a student requires supports and services that the board cannot provide under any other provision of the Act.
3. Upon referral, the Tribunal must either:
 - Confirm the board's determination that additional supports are required beyond what the board can provide, or
 - Determine that the board is capable of providing an appropriate education program.

B.3 Tribunal Duties and Powers

Once a referral is accepted, the Tribunal is empowered to:

1. Develop or Approve a Plan:

- If the Tribunal confirms the board's determination, it must develop or approve a plan that meets the student's complex educational needs.
- The plan identifies the roles of all parties involved (the board, the student, the parent, Alberta Education, and other service agencies) and assigns responsibilities for funding and service delivery.

2. Determine Funding Apportionment:

- The Tribunal has authority to apportion the costs of supports and services among the parties named in the plan.

3. Ensure Compliance:

- Once the plan is approved, both the division and the parent must comply with its provisions.
- Where the Tribunal determines that the board can provide an appropriate program without a specialized plan, the board is legally required to do so.

4. Exercise Powers under the Public Inquiries Act:

- The Tribunal and its members have the powers of a commissioner under the *Public Inquiries Act*, enabling them to compel evidence, summon witnesses, and obtain records necessary to fulfill their duties.

B.4 Review and Duration of Tribunal Plans

1. A plan developed or approved by the Tribunal must be reviewed at least once every three (3) years, or earlier if the Tribunal so directs, until the student is no longer entitled to an education program under the *Education Act*.
2. The review may be conducted by the same Tribunal or another Tribunal established by the Minister.
3. The review may amend, confirm, or replace the existing plan, as necessary to continue meeting the student's needs.

B.5 Ministerial Review

1. Either a parent or a division may request in writing that the Minister of Education review:
 - A Tribunal's confirmation of a board's determination, or

- A plan developed or approved by a Tribunal.
2. Upon such request, the Minister may review, vary, or confirm the decision of the Tribunal.

B.6 Implementation and Compliance

1. Once the Tribunal has rendered a decision, the board must immediately implement the plan or corrective measures specified in the ruling.
2. Failure to do so may constitute non-compliance under the *Education Act* and be subject to Ministerial direction or enforcement.

B.7 Relationship to this Letter of Understanding

1. The Tribunal serves as the final external mechanism of appeal under Section 6 (Stage 3) of this Letter of Understanding.
2. Nothing in this Appendix restricts a teacher's or division's ability to resolve issues through the earlier stages of the appeal process described in the LOU.
3. References to the Tribunal in the LOU are to be interpreted consistently with the authority, duties, and review requirements set out in this Appendix and in Division 5 of the *Education Act*.

B.9 Summary Table of Tribunal Functions

Function	Description	Statutory Reference
Establishment	Created by Minister of Education	s.30.4
Jurisdiction	Matters where board cannot meet complex needs	s.30.4(1)
Decision	Confirms or overturns board determination	s.30.4(2)
Plan Development	Develops or approves individualized plan; apportions funding	s.30.5(1)–(2)
Compliance	Plan binding on board and parent	s.30.6(1)
Periodic Review	Every three years, or sooner if required	s.30.7(1)
Ministerial Review	Minister may vary or confirm Tribunal decision	s.30.8
Procedural Powers	Powers of a commissioner under <i>Public Inquiries Act</i>	s.30.9

B.10 Future Updates

If Alberta Education issues regulations, procedural rules, or policy directives that specify timelines or processes for the Complex Education Needs Tribunal, the Parties agree that these documents will take precedence over the expectations in B.6. Additionally, Appendix B shall be updated by mutual consent to incorporate those new provisions.