



Memorandum

Date: October 17, 2018
To: Planning and Facilities Committee
From: Mitch Van Aller, Director of Operations
Prepared By: David Widdis, Planning Manager

Action Item: Proposed Work Plan for Long-Term Facility Plan Update

1.0 ISSUE STATEMENT

As part of the British Columbia Ministry of Education requirements is that school districts prepare Long-Term Facility Plans. The District's plan is part of an overall goal that;

"Each Central Okanagan School District student (K-12) will provide evidence of being a Learner, Thinker, Innovator, Collaborator and Contributor"

The district-wide Facility Plan forms the basis for all investment decisions by the Ministry. The Long-Term Facility Plan takes into account educational program requirements and trends, operating capacities, current condition of facilities, current and anticipated changes in land use, yield rates, community demographics, local community and economic development strategies and other considerations.

2.0 RELEVANT BOARD MOTION/DIRECTION

Main 12P – 202: December 12, 2012 Public Board Meeting

THAT: The Board of Education receive and approve the Long-Term Facility Plan, as amended at the November 28, 2012 Public Board Meeting.

3.0 BACKGROUND

In December 2012, the Board approved the District's Long-Term Facility Plan (LTFP). The LTFP provides a comprehensive rationale and business case for specific capital projects that may be proposed as part of the District's five year capital plan. In addition, the LTFP provides other key local decisions such as school consolidations, grade configurations and locations for future district programs and maintenance priorities. The LTFP outlines a plan for a ten year planning horizon.

Since the adoption of the LTFP, the District has experienced significant growth that has impacted the current facilities and educational programming in the District. Some considerations related to opportunities and constraints that surfaced since the adoption of the LTFP include:

- Available capacity in some schools and enrolment overflow in other schools throughout the district.
- Increasing enrolment impacting the utilization of many schools.
- Current and increasing anticipated pressures on Early French Immersion programs and facilities.

- The introduction of Late French Immersion and the consideration of Middle French Immersion and how these programs amalgamate with Early French Immersion programs.
- Review of the District's long-term vision for a new schools and school additions.
- Facilities ability to accommodate outside programs with growing enrolment.
- The transitioning of all students through the various grade levels and grade reconfigurations.
- Opportunities for how we engage and teach students in current and new spaces around the new Curriculum Framework.
- The implementation of a Strategic Plan and the LTFP.

The review of the LTFP must consider all the changes experienced in the District. Although the vision and mission identified in the LTFP may be still relevant, the review will assess the impacts the changes in the District has seen and how they impact the long term future of schools and facility needs.

In 2016, the Ministry of Education has provided guidelines for the development and/or review of a LTFP. The intention of the guidelines are to help develop consistency with the plans across the province. In addition, a LTFP is to provide the background necessary for the development of a District's Five Year Capital Plan. The Ministry guidelines are provided in Appendix B.

The development of the current LTFP included the establishment of a steering committee. The proposed committee would include: Superintendent of Schools/CEO, Deputy Superintendent, Secretary-Treasurer/CFO, Director of Operations, Planning Manager, Assistant Superintendents (Central Kelowna, Lake Country, Mission, Rutland, Westside), and a Board Member.

4.0 POINTS FOR CONSIDERATION

LTFP was adopted on December 2012 and the District has seen several changes in the demographics, school enrolment and educational programs among other things that warrant a review of the LTFP at this time.

5.0 OPTIONS FOR ACTION

- 5.1 Authorize staff to proceed with the LTFP Review.
- 5.2 Amend the process to guide the LTFP Review.
- 5.3 Deny the recommendation to proceed with the LTFP Review.
- 5.4 Provide additional or different direction.

6.0 FOLLOW-UP/REVIEW

- 6.1 Establishment of a Steering Committee for the plan.
- 6.2 Confirm the schedule with the Steering Committee.
- 6.3 Define the a consultation process for the LTFP.
- 6.4 District staff will proceed with the draft schedule defined in Appendix A and bring forward updates at future meetings of the Planning and Facilities Committee for review and discussion.

7.0 DIRECTOR OF OPERATIONS COMMENTS

Staff will continue with the review of the LTFP to address the Ministry requirements and update the document to work in conjunction with the Five Year Capital Plan submissions.

8.0 STAFF RECOMMENDATION

THAT: The Planning and Facilities Committee recommends to the Board:

THAT: The Board of Education direct staff to undertake the review of the Long Term Facility Plan as scheduled in Appendix A.

9.0 APPENDIX

A. Draft Schedule for Review of the Long Term Facility Plan

B. Ministry of Education Long Range Facilities Plan Guidelines

Appendix A

Schedule for Review of the Long Term Facility Plan

PROPOSED PROCESS & SCHEDULE

Establish Steering Committee	Nov 2018
Establish Schedule	Nov 2018
Establish Consultation Strategy	Nov 2018
Review Ed Plan Guiding Principles with Board at P & F Mtg	Dec 2018/Jan 2019
Information Gathering (ie. Meetings with municipal planning departments, Identify and update residential developments, Facility Audits, Update Enrolment Projections and Capacity's	Jan – Mar 2019
Half Day Workshop #1 with Assistant Superintendents <ul style="list-style-type: none">• Demographics• Catchment Area Review• Development of Options• Educational Considerations• Facility Conditions• Capital Plan	Feb, 2019
Development of Recommendations & Goals	Feb & March 2019
Half Day Workshop #2 with Assistant Superintendents <ul style="list-style-type: none">• Demographics• Catchment Area Review• Development of Options• Educational Considerations• Facility Conditions• Capital Plan	March, 2019
Refinement of Recommendations & Goals	March, 2019
Recommendations & Goals Analysis Workshop #3	April 2019
Board Consultation	April 2019
Public Consultation	May & June 2019
Review of Consultation and Adjustments	June 2019
Review of Recommendations & Implementation Strategy	June 2019
Prepare Final Updated to Long Term Facility Plan	Summer 2019
Steering Committee Review of Draft Long Term Facility Plan	Sept 2019
Public and Board Review of Draft Long Term Facility Plan	Oct 2019
Final Adoption of Long Term Facility Plan	Oct/Nov, 2019

Appendix B:

LONG RANGE FACILITIES PLAN GUIDELINES

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PART I: INTRODUCTION

This *Guideline* is to be read in conjunction with the *Capital Plan Instructions for Five-Year Capital Plans* published by the Ministry of Education.

The LRFP is a mechanism for school districts to effectively demonstrate that proper facility planning is taking place in support of the districts educational plan over a 10 year window. LRFPs are required to:

- ✓ Be developed, maintained and made available upon Ministry's request.
- ✓ Have the concurrence of the appropriate Ministry Planning Officer (PO) prior to being approved by the Board.
- ✓ Be in planning, development or finalized upon receiving the Capital Plan Instructions.

LRFPs will be prepared using district financial resources. LRFPs remain valid until they are changed and are not required to be revised or re-submitted annually. However, as part of their annual Five-Year Capital Plan submission, the Board will be required to certify that no significant changes have occurred within the district that warrant a revision to the LRFP.

The LRFP is expected to be developed in accordance with all Regulations, Orders-In-Council, School Act Ministerial Orders as well as Ministry Policies, Instructions and Guidelines provided by the Ministry. The LRFP has no authority to amend the intent or direction provided above; for example, while the LRFP may identify a proposed school closure, the School Opening and Closure Order must be followed to implement the closure.

PART II: SCHOOL DISTRICT PLANNING

The fundamental premise of the LRFP is to provide a mechanism for districts to demonstrate they are managing their facilities in an effective, economic and efficient way in support of their educational goals. The LRFP places the need for capital projects in a district-wide context and becomes the basis for submission of capital project requests by the district and for investment decisions by the Ministry.

The LRFP will identify at least the following:

- ✓ the educational programs operating within the district
- ✓ future trends or anticipated new initiatives, including both those of the school district and the government
- ✓ the current district enrolment and forecast enrolment trends for 10 years
- ✓ potential reconfiguration of district programs
- ✓ the current capacity of all facilities, including temporary accommodation and/or rental facilities
- ✓ how maintenance of the district's permanent facilities will be carried out
- ✓ building condition of all of the district's facilities
- ✓ implementation of sustainability initiatives to meet the goals of the Province
- ✓ use of temporary accommodation including rental or leased space, and
- ✓ transportation of students

The government of BC has also supported appropriate alternative community uses on school sites and/or in school facilities. More details of this initiative are provided in Part III.

School districts are expected to make decisions on the optimum use of their facilities based on a district-wide perspective. However, in some districts there may be a necessity or advantage in evaluating facilities on a zone or geographic basis, based on the layout of the school district and/or the community it serves. Such statistical study areas are acceptable as long as they are clearly identified and the rationale for their allocation is provided.

Where school districts may not have internal expertise in planning, they should consider the retention of the appropriate external expertise and experience in making informed assessments about enrolment, capacity and utilization to supplement the district's ability to complete their LRFP.

There are some changes that are considered significant and these changes will require formal revision to a district's LRFP. Examples are:

- ✓ any significant changes in educational programs, either initiated by the district or by government
- ✓ enrolment projections that exceed 10% (either increase or decrease) over the 10 year window of the LRFP
- ✓ proposed reconfiguration of schools
- ✓ a change in the availability status of any facility used for K-12 education, and/or
- ✓ other events that potentially affect investment decisions in the district's facilities.

Any revision of a district's LRFP must be discussed with the appropriate Ministry Planning Officer (PO) for concurrence before being approved by the Board. In developing the LRFP, at a minimum, the PO must be consulted as the following are identified:

- ✓ Capacities of individual schools
- ✓ Establishment of statistical study areas
- ✓ 10 year enrolment forecast
- ✓ Final draft LRFP prior to submission to the Board for approval

In the development of the LRFP, districts are expected to work with local and other related jurisdictions and to consult with each other on future development, school enrolment, school site requirements, locations, etc. The planning inherent in the LRFP will also provide the framework and data necessary for the establishment of a School Site Acquisition Charge (SSAC). This will permit the submission of a stand-alone capital project request for site acquisition.

PART III: REQUIREMENTS FOR LONG RANGE FACILITIES PLAN

1. BACKGROUND

The Long Range Facilities Plan (LRFP) is not simply identification for needed capital projects but rather it is a comprehensive plan outlining how the district will manage its school facilities in order to deliver its educational programs at the highest possible standard. This requires a two- step approach:

1. examining how to best utilize the current operational and maintenance resources of the district to best maintain its facilities, and
2. identifying the capital project requirements at the end of a facilities life or to meet changing needs.

The effective, efficient and economic use of a district's facilities may also impact the transportation of students where facilities are not located within acceptable walking distances.

The Ministry continues to seek funding from government both for operational grants to districts as well as new capital funding. However, for the foreseeable future, both school districts and the Ministry must exercise reasonable expectations of the overall investment in educational facilities by government. Toward this end, it is important for school districts to ensure that the LRFP is capable of sustainable delivery of the best possible facilities to meet the districts educational programs.

2. REQUIREMENTS

The following are the minimum requirements to be included in the LRFP:

a. Educational Considerations

Housing students and staff for the delivery of high quality educational programs is the reason a school district has facilities. Therefore a review of the programs offered in a district is critical to understanding the need for facilities. In addition to the core curriculum for K-12, districts may have organized for other special programs i.e. Montessori, French Immersion, Aboriginal Education, special needs, district programs, etc., that impact on the location and use of the district's facilities.

In this section, an outline of the key educational programs is required to better understand the allocation and use of facilities.

School districts are also being encouraged to introduce more choices and greater flexibility in the education system. The mandatory establishment of catchment areas for each school will ensure that students have priority to attend their neighborhood school, but will also enable school districts to create “specialty” schools that will serve the larger community.

It is recognized that many schools now provide space for important community functions. The allocation of these spaces within the school facility needs to be identified as part of the space use allocation since they potentially affect available space and overall school utilization. Any space utilization contained in classrooms such as childcare, district programs, etc should also be identified.

b. Existing Situation

This section identifies the current situation at the time the LRFP is prepared and will be the “base case” for the school district. It includes the following:

- **Inventory of School District Facilities**

All district assets used for K-12 education must be identified. These include, but are not limited to the following:

- Elementary schools
- Middle schools
- Secondary schools
- Special purpose schools
- Leased or rented property used for K-12 school purposes
- Temporary classrooms (portables, etc)

In order to operate, the district may also have facilities that are not used for day-to-day K-12 purposes. These should also be included within the districts LRFP.

- Board offices
- administrative buildings
- maintenance facilities
- garage
- adult education centres
- vacant sites owned by the Board, and whether rented or leased to others
- closed schools that may or may not have an alternate use
- storage
- etc.

In many districts, facilities may have a combination of uses, including a mixture of K-12 education, district facilities and community uses. Where this is the case, it should be clearly identified in the LRFP.

- **Non-School Users within District Facilities**

The government of BC has also supported appropriate alternative community uses on school sites and/or in school facilities. Any other non-K-12 educational use on school property should be identified. Examples include childcare centres, recreation centres, education support programs, etc. The district may also share an operational or site management relationship with the external user.

The allocation of any space within the school facility in addition to the Ministry area standards need to be identified as part of the space use allocation.

- **Condition of Existing Facilities**

The information of the condition of all district facilities needs can be accessed through the Capital Asset Management System (VFA database). As the information from this database are based on a standard type facility audit, districts can undertake a more comprehensive facility audits if they feel it is necessary to properly identify the building condition. The LRFP does not require the district to conduct a more detailed Facility Audit.

A qualified and independent consultant must be used if a formal Facility Audit is undertaken. Before engaging such a consultant, the Ministry Planning Officer can confirm whether the preparation work for implementation of the Capital Asset Management System may be able to provide this service.

- **District or Community Geography**

School districts are expected to make decisions on facilities based on a district-wide perspective. However, in some districts there may be a necessity or advantage in evaluating facilities on a zone or geographic basis.

If districts currently utilize zones or have different conditions for different geographical areas, then the zone or geographic area should be clearly identified and the rationale for its allocation provided as part of the LRFP.

- **Capacity**

Capacity is defined as the operating capacity of each school, which is a function of the nominal capacity, grade configuration and class sizes. The district will identify the current capacity of each facility used for K-12 education. Concurrence by the Ministry Planning Officer is required once these have been identified in the LRFP.

- **Current Enrolment**

School districts will provide the current enrolment in the first year of the LRFP, both by district (or zone and/or geographical area as applicable) and by individual school.

- **Utilization**

With the identification of K-12 school facilities, capacity and enrolment, the utilization of individual schools can be calculated.

- **Transportation of Students**

Transportation of students is affected by the location, condition and educational use of the district's facilities. The district will identify where transportation of students is required and include an inventory of their transportation fleet in accordance with Schedule D.

The identification of the above factors will allow the district to develop the current situation as a "base case". Such a base case will be able to predict the operational and maintenance costs over the 10 year window of the LRFP. This "base case" may then be used for comparison with other potential options.

c. **Enrolment Forecast**

Effective capital planning requires a long-term overview of enrolment in order to predict trends in the supply and demand for facilities, and to avoid potentially costly short-term solutions.

The Ministry provides a ten year projection of enrolment for all districts. Based on this, the district will provide an enrolment forecast for individual schools.

School districts may choose to develop their own ten-year projections based on local knowledge of future development, enrolment trends, future housing and student yield rates; however, in these cases the school district needs to document why their projections differ from the projections of the Ministry.

d. **Challenges for the Future**

Any needed adjustments due to changing educational requirements, new programs, district initiatives and community impacts should be identified and the impact on the district's schools quantified. This includes changes both as a result of school district initiatives as well as that of government.

Other typical considerations in this section might include:

- the impact of heritage,

- post-disaster agreements and requirements,
- sustainability initiatives
- the need for additional temporary accommodations
- schools that are listed on the active Building Envelop Program (BEP) roster for future projects, and
- schools identified Seismic Mitigation Program along with their current seismic risk.

The future of B.C. schools is also changing with the government of BC supporting appropriate alternative community uses on school sites and/or in surplus school facilities. Typical examples are:

- Neighbourhoods of Learning. This project will see education and community services brought together in a single neighbourhood hub – one where schools and community organizations can create places where people can access educational and community services under one roof. Schools throughout the province will be able to adopt this model in the future to use extra space in schools to best meet the needs of their students and communities. All school districts are expected to move towards a more inclusive approach when planning the use of school space in the future.

For the purposes of the LRFP, districts will identify purposely build (new schools built since the Neighbourhood of Learning initiative started where up to 15% of the total gross area was made available for Neighborhood Learning Centers (NLC)) and converted space (existing schools before the NLC initiative) of an individual school that is allocated to Neighborhoods of Learning initiatives such as early learning or child-care programs, office or meeting rooms for non-profit organizations, health clinics, sports programs, family resource or seniors' centres, industry training, or branch libraries.

- StrongStart BC Centres. Districts will identify classrooms in their elementary schools to accommodate these centres over the window of the LRFP.
- Alternate Community Uses. School districts are to clearly identify any and all community partners who are located within schools or are anticipated to be located within schools.

As a result of shifting demographics and population patterns there are fewer students in the schools, leaving many of these valuable facilities under-utilized. As part of these assessments during development of the LRFP, districts may also need to review the allocation of existing space within their district. This may require the re-allocation of catchment area boundaries in order to ensure the optimization of available space.

e. Impact on Utilization and Optimizing Available Space

School districts must be able to demonstrate that they are using their existing school facilities efficiently, effectively and economically based on the broader context of capacity utilization at the district (sub-district) level.

The purpose of optimizing space utilization is to ensure sufficient space is available to students today and for enrolment forecasts over the next 10 years, while minimizing the costs of construction, operation and maintenance arising from inefficient use – ultimately so the maximum amount of funding can be directed to instruction and programming.

What is considered “optimal space utilization” varies between large urban districts and small rural districts due to practical realities of population distribution, density, travel distances, and weather extremes. Additionally, an approach to optimizing space utilization varies between school districts due to declining enrolment, stable enrolment, increasing enrolment or shifting enrolment within the school district. As such, the Ministry will assess what is practical and achievable on a project specific basis as part of the PRFS and PDR.

f. Potential Options

Based on the current situation within a district and the constantly changing educational environment, it would be unusual if a district had no other options for the future of its facilities. These options will quantify the operational costs, specific capital projects and components that require further analysis or public consultation.

School districts experiencing continued declining or shifting enrolments should reduce the inefficient use of school facilities through facility consolidation. Various options should be evaluated to determine a preferred option. Should the building be replaced rather than renovated, and conversely, should the building be renovated rather than replaced? If a replacement is in order, is it more practical to add on to other schools to reduce capacity or need for the replacement school?

For school districts experiencing significant growth, there may be options for new schools, consolidations, reconfiguring or property acquisition to protect future sites.

All of these options will have an effect on both operating and capital costs. If, as a result of this evaluation, a capital project is being requested and the district is below the Ministry utilization guidelines or proposes an addition, replacement or new space, the district must clearly identify what other options have been considered.

g. Comparison of Options

Based on the above evaluation, it should then be possible to identify other options to compare to the base case (current situation).

The Ministry will consider replacement, in special circumstances, addition requests that are supported by a comprehensive business case evaluation that confirms the optimal utilization of schools in consideration of their age, building condition, capacity, and location. The business case

should also identify potential savings in operating costs as well as the type of change, affects on other facilities, estimated costs of conversion, and the timetabling for such changes.

In order for the Ministry to support a request for capital, the option proposed must be compared to the base case. Such a comparison should follow generally accepted rules for a “business case”. It will be important for infrastructure investment purposed that the overall least cost alternative be identified. In cases where this is not being recommended, then detailed justification must be provided.

h. Implementation Strategy

For capital projects, districts should be able to identify capital project priorities, the sequence for implementation and general timelines to meet the educational needs of the district.

The district should specifically identify what option it is recommending.

PART IV: REPORT FORMAT AND DOCUMENTATION

The LRFP report will consist of a report with specific schedules. The report will contain at least the information listed in these Guidelines and the Schedules.

The following schedules are required to be submitted as part of the LRFP.

MANDATORY SCHEDULES:

- A. Overall School District Map
- B. Inventory of SD Facilities
- C. “Base Case” Summary
- D. Transportation of Students
- E. Option(s)
- F. Options Comparison
- G. Recommended Option and Implementation Strategy
- H. MPO Checklist and Concurrence Assessment Tool

OPTIONAL SCHEDULES: (if applicable to LRFP)

- I. Consultation
- J. Statistical Study Areas
- K. Facility Audits

PART V: SUMMARY

Consultation is not a mandated requirement for the LRFP. However, it is suggested that the LRFP identify all consultation that might have been undertaken during its development.

Note that the Ministry of Education has published Ministerial Orders that affect the disposal of lands and improvements and the opening and closure of schools. It is critical, that if the LRFP has provisions affected by these or other Ministry directives, that the district be in compliance with the required consultation process and timeframes.

Should school districts have any concerns with the information requested or how to interpret these guidelines, they should contact their Ministry Planning Officer.

MANDATORY SCHEDULES

- A. Overall School District Map – map showing SD boundaries, local jurisdiction boundaries, location of all facilities.
- B. Inventory of SD Facilities – spreadsheet to include, school data, capacity, enrolment, utilization, facility condition index, etc.
- C. “Base Case” Summary – current situation, but explains impact of continuing without new capital.
- D. Transportation of Students – outline of fleet info (#s, age, etc), replacement program in accordance with Ministry guidelines and rationale for transport.
- E. Option(s) – list of other options to achieve the district’s educational objectives.
- F. Options Comparison – tabular comparison chart to be developed.
- G. Recommended Option and Implementation Strategy.

OPTIONAL SCHEDULES: (if applicable to LRFP)

- H. Consultation – identify all consultation by date and location during development of the LRFP

- I. **Statistical Study Areas** – maps with school identifiers of zones or geographical areas as required

- J. **Facility Audits** – scoring sheet attached as per Ministry guidelines only if formal facility audit conducted. Complete Facility Audit reports to be made available to Ministry on request.