

APPENDIX C: LONG-RANGE FACILITIES PLAN GUIDELINES

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PART I: INTRODUCTION

The *School Act* provides that the Minister of Education may require a board of education to prepare and submit a capital plan for its school district to the Ministry. The Ministry also requires additional supporting information when it considers whether to provide funding support for any proposed Minor Capital Program project or Major Capital Program project included in a Five-Year Capital Plan submission. Detailed project information is currently provided through the submission of templated forms and documents. The Ministry also depends on other longer-term capital planning information upon which a board of education may make decisions for its school district.

Each board of education is expected to have a Long-Range Facilities Plan (LRFP) in place for its school district that lays out various management strategies regarding its inventory of capital assets - primarily to support changes in student enrolment and educational programming goals. Although a current LRFP is not required to be included as part of a Five-Year Capital Plan submission, the Ministry may request a school district to reference relevant sections of the LRFP to help inform its capital plan review process.

PART II: LONG-RANGE FACILITIES PLAN FOR SCHOOL DISTRICTS

A Long-Range Facilities Plan (LRFP) should not just serve to identify capital projects needed in a school district in the same manner that the Five-Year Capital Plan Summary provides a prioritized list of all capital projects requested for funding consideration. The LRFP should instead present a wide-ranging vision for the use of a board's current and potential future inventory of capital assets, providing broad strategies for the most-effective delivery of education programs. Another critical consideration for the LRFP should be the alternative community use of space in open schools and closed schools, as well as the use of school property.

As a comprehensive planning tool, a LRFP is expected to cover a 10-year timeframe, at a minimum, and outline how a board of education intends to manage an inventory of existing facilities and planned new facilities during that time. An LRFP should be realistic in terms of expectations for the Ministry's allocation of capital funding for the replacement of existing schools and the creation of new space through the construction of new schools and additions to existing schools.

Focusing on schools, a board of education has the flexibility to develop a LRFP that compares the current situation in a school district to a number of possible future scenarios. Close consideration should be given to a variety of known variables along with possible future influences.

For the current situation in a school district, the LRFP should examine how best to utilize immediately available space to accommodate existing student enrolment, while ensuring a prudent application of available operating funds and maintenance funds for those open schools with students in attendance.

Future scenarios that are developed for a school district should endeavour to identify feasible responses to foreseeable changing needs, including:

- Anticipated enrolment growth, involving redistribution of students among existing schools; grade re-configurations of schools; amended catchment areas; reorganization of feeder schools; increased use of temporary accommodations, such as portable classrooms or leased space; expansion of existing schools; and building new space.
- Building condition and future maintenance requirements for existing schools, and whether to upgrade existing schools, to wholly replace existing schools, or to partially replace existing schools.
- Potential changes in educational programming and instructional methodologies that may directly impact student attendance at schools and the way schools continue to function.
- Anticipated enrolment decline, involving the closure of schools; the redistribution of students among remaining open schools; grade re-configurations of schools; amended catchment areas; reorganization of feeder schools; and the disposal of school properties.

It is important that a LRFP does not simply reiterate a school district's current organization, including grade configurations, catchment areas, and educational programming locations. The development of a valuable LRFP should involve an exploration of a variety of alternative solutions that could address evolving school district needs, even if such alternatives are a direct challenge to the *status quo*.

Demographic analysis of the communities being served by the school district is important in identifying trends of: birth rates for different segments of the population; family in-migration and out-migration for various neighbourhoods; changes in local economies; emerging employment opportunities that may attract families; and family housing affordability. It is inadequate to simply rely on population projections based on past census data without understanding the underlying forces that are driving overall population changes.

Boards should also consult with each of its local governments regarding their consistent planning for continued residential development and future school facilities. The *Local Government Act* does require that a local government consult with a board of education when it is adopting or amending its Official Community Plan. The local government should be seeking the input of the board specifically on matters of the actual and anticipated needs for schools; the size, number and location of anticipated school sites; the types of anticipated schools; and the timeframe for the anticipated schools; and how they relate to existing or proposed community facilities.

Moreover, local government is also required to consult with a board at least once in each calendar year, appreciating that approval of new subdivisions, increased densification of existing residential areas, or changes in land use for established residential areas all could ultimately impact student enrolment in various areas of a school district.

In a complementary manner, the *School Act* encourages cooperative planning between these parties by requiring that boards of education must review and consider any area community plans in place within its school district and consult with local government when preparing its Five-Year Capital Plan. The goal is to ensure that the capital plan being developed for a school district is consistent with those community plans.

Public consultation is a key element in the development of a new LRFP or when updating an existing LRFP, especially with respect to the desired provision of childcare and other alternative community uses of space in open schools and closed schools, and to increased public access to school grounds. This consultation must include students, parents, community agencies, local government, First Nations, business interests, and all other engaged members within the educational community. Input from local bands regarding indigenous student attendance trends and indigenous study programming will be an important consideration in any meaningful LRFP.

The results of these external consultations will ultimately assist a board of education when determining the capital needs of its school district, including a strategy for the acquisition of sites for new schools; the retention and upgrading of existing schools; the closure of existing schools, and the disposal of surplus school properties.

Any costs related to the preparation of a LRFP are the responsibility of the board of education.

PART III: LONG-RANGE FACILITIES PLAN FUNDAMENTALS

The following major subjects are typically covered in a Long-Range Facilities Plan (LRFP) created for a school district.

a. School District Organization

If a board of education currently makes a distinction between different geographic locations or designated zones within the school district, then the LRFP should separately address current and anticipated situations that may uniquely impact each of those distinct areas or zones.

b. Educational Programming

The LRFP should provide an outline of the educational programs for which student accommodation – using either permanent, temporary, or leased space - is currently required in a school district. Educational programming may be conceptualized in terms of regular student attendance in neighbourhood schools or student attendance being draw from a greater geographic area to a magnet school(s) providing specialized curriculum in the school district.

In school districts with varying rates of student enrolment growth or with student enrolment decline, consideration may be given to the relocation of specialized educational programs, to ensure an improved utilization of available space.

A board of education must contemplate potential changes in educational programming that may be offered for its students. These changes can be reflective of a continuous evolution in instructional methods, such as student use of rapidly advancing technology and online resources, or a response to new programming directions being introduced by the board solely for its own school district or by the Ministry for all K-12 students across the province.

c. Student Enrolment

Effective capital planning requires a long-term overview of student enrolment trends to properly predict the future demand for school space. The goal of the LRFP is to ensure that any permanent space proposed to be created in a school district will continue to be required for the accommodation of students for the entire physical life of that space.

School districts should include the current student enrolment figures in the first year of the LRFP with projected enrolment provided for ten years hence. Student enrolment may be presented either on a district-wide basis, by geographical location, or by zone, as may be applicable for the school district. For the purposes of developing a Five-Year Capital Plan submission, the Ministry provides a ten-year projection of total student enrolment in each year for each school district. A school district may refine these projections or develop its own ten-year projections to support the LRFP, based on knowledge of future residential development and student yield rates, shifts in demographics, and population increases or decreases, especially in response to expectations for the local economy.

The current and forecasted enrolment figures for individual schools in a school district are produced annually, as part supporting documentation for a board's Five-Year Capital Plan submission. [See School District Summary of Capacity and Projected Enrolment Form (CP-3)]

d. Existing Schools

i. Building Condition

Building condition information for existing schools is available through the facility condition assessment work performed by VFA Canada Corporation. The Facility Condition Index (FCI) for each existing facility in a board's inventory can be determined for the first year of the LRFP, as well as for subsequent years by using the building requirements that are identified to come due in each of those subsequent years.

While the value of the FCI does not reasonably qualify the condition of an individual school, such as "good", "fair", "poor" or even "critical", it does provide a reliable indication as to the amount of capital investment that may be required to keep a facility in an acceptable operational condition.

This information should assist a board of education in determining its long-term maintenance plan and deciding whether necessary building component upgrades or replacement – as well as changes in the BC Building Code and BC Energy Step Code requirements - can be managed using its Annual Facilities Grant (AFG) and local capital funds, or that capital funding should be sought from the Ministry through an Minor Capital Program such as the School Enhancement Program (SEP) or Carbon Neutral Capital Program (CNCP).

Ultimately, it may be more fiscally prudent for a board to seek Replacement Program (REP) funding from the Ministry for a partial or full replacement, if the currently attending students cannot be accommodated at a neighbouring school(s).

ii. Seismic Mitigation

For school districts located in high-risk seismic zones, the condition of a building should also include its vulnerability in the case of a major seismic event. The LRFP should highlight schools having high-risk blocks that require either seismic upgrading or replacement.

Part II of the Capital Plan Instructions: Five-Year Capital Plan Submission provides a section on Seismic Mitigation Program (SMP) projects, which gives details on the different approaches that may be considered by a board in addressing any seismic risks facing its schools.

iii. Heritage Conservation

Heritage conservation legislation in British Columbia enables most public institutional buildings to be conserved as heritage property. This may include government buildings, hospitals, educational facilities, and places of worship. Particularly, the *Local Government Act* gives local government the authority to determine whether a board-owned property has sufficient heritage value or heritage character to justify its conservation.

Where the conservation of heritage resources is well-integrated into local government planning and other community activities, a school may already be listed on a community heritage register or alternatively have heritage designation.

Given the integral role that schools can play in the life of a community, the level of local government and public involvement in the conservation of heritage resources will ultimately determine how a LRFP must consider the heritage value of individual existing schools, whether open or closed.

To balance the interests of a board of education and local government, it is necessary for a school district to regularly consult with local government regarding the community's interest, needs and issues, as a whole, around public institutional building conservation. These two government entities are expected to work together to achieve common heritage conservation objectives for schools that can be expressed in the LRFP.

iv. Post-Disaster Shelters

Building codes for high-risk seismic zones pointedly distinguish between post-disaster buildings and buildings that will be used as post-disaster shelters.

Post-disaster buildings are essential to the provision of services in the event of a disaster. These include hospitals; emergency treatment facilities and blood banks; telephone exchanges; power generating stations and electrical substations; control centres for air, land and marine transportation; public water treatment and storage facilities; water pumping stations; and sewage treatment facilities. Since a post-disaster building must be designed to be completely operational immediately following a significant seismic event, the design criteria for a post-disaster building would be 1.5 times the seismic loads compare to an identical ordinary building.

Buildings that are likely to be used as post-disaster shelters include elementary schools, middle schools, secondary schools, and community centres. However, the design of these ordinary buildings is meant to minimize the hazard to life for its occupants, with no requirement for increased seismic loads.

Part II of the Capital Plan Instructions: Five-Year Capital Plan Submission provides a section on Seismic Mitigation Program (SMP) projects, which gives details on the different approaches that may be considered by a board in addressing any seismic risks facing its schools.

e. School Capacity

i. Nominal Capacity

In the planning of new school space or replacement space for an existing school, the Ministry uses a designated nominal capacity (i.e., design capacity) for a new school, an expanded school or a replacement school only to determine the space allocation for that school. This amount is then used with the current unit rate (\$ amount per m², as set separately by the Ministry for elementary, middle and secondary school projects) to calculate the Capital Project Budget. The nominal capacity is based on a notional number of students for hypothetical classes for Kindergarten (20 students); Grades 1 – 7 (25 students); or Grades 8-12 (25 students). The nominal capacity may therefore only approximate the number of students in an instructional setting for which teachers may be contractually responsible.

ii. Operating Capacity

By contrast, the operating capacity of an existing school reflects the number of students that it may accommodate, based on the maximum number of students for which teachers may be responsible for in an instructional setting. Previously, class sizes for Kindergarten, Grades 1-7, and Grades 8-12 were set in legislation, and were mandatorily applied to all school districts across the province. Currently, class sizes are negotiated as a working condition for teachers in their local contract with a board of education. As such, operating capacities vary between school districts. Individual school districts must determine the operating capacities of existing schools in order to calculate their capacity utilization. This measure will help identify surplus space that may be available to accommodate students and perhaps specialized educational programming or other uses, such as childcare.

f. Transportation of Students

The LRFP should identify when the transportation of students is currently a requirement, based on where students reside relative to existing schools. It will be important for the LRFP to outline how ongoing operational and maintenance costs for such a service are warranted, considering the impact on those schools receiving transported students.

Any anticipated changes in zones of a school district where transportation services have typically been provided, resulting in the growth or decline in ridership numbers, should be discussed in the LRFP.

g. Community Use

It is recognized that many schools provide space for various community functions, whether using designated Neighbourhood Learning Centre (NLC) space or surplus classroom space. This alternative use of educational space, for activities such as early learning programs, childcare, health clinics, family resource centres, senior centres, community kitchens, office or meeting rooms for non-profit organizations, recreational sports programs, adult training program, or libraries needs to be identified in the LRFP. The continuity of such alternative community uses should be carefully considered, in the context of increased or decreased demand for student instructional space that may be anticipated in future years.

The LRFP should also address the current and ongoing community access to school grounds, which may include the use of playground equipment, playfields, running tracks, tennis courts, skateboard parks, or the on-site location of childcare facilities and StrongStart centres. Any operational or management arrangements with an external use, whether annual or long-term, should be identified.

h. Public Consultation

A board of education must decide how public consultation will be undertaken in the development of the LRFP for its school district. When a consultation process is completed, it is advisable that the public input be summarized and how that information was used by the board in the drafting of the LRFP.

PART IV: SUGGESTED SCHEDULES

Several schedules may be included as part of a LRFP, offering more detailed information in support of the current and future scenarios presented in a LRFP. Prospective schedules should include:

- A. School District Maps – e.g., maps showing the location of all board-owned facilities, whether operational or vacant, to include schools; catchment areas for open schools; education centres; administrative offices; maintenance yards, and bus garages; geographic locations; designated zones. Local government boundaries should also be indicated.
- B. Inventory of Schools – e.g., spreadsheets showing design capacities; operating capacities (based on local teacher contract class sizes and compositions); current student enrolment; projected Year Ten student enrolment; current capacity utilization; projected Year Ten capacity utilization.

- C. Facility Condition Assessment Reports – VFA Canada Corporation Facility Condition Assessment reports indicating current and future Facility Condition Indexes (FCI) for board-owned facilities.
- D. Base Case Summary – summary that captures the current facility inventory situation but also explains the impact of continuing without new capital investment.
- E. Public Consultation Summary – summary that includes a description of the public consultation process undertaken; the type of public input received; and how the input was used during the development of the LRFP.