



Ministry of Education

2005/06
Capital Plan
Instructions

Funding Department

June 2004

PART I: AN OVERVIEW

The ongoing demand for investment in public infrastructure, coupled with the Provincial Government's commitment to balance the budget by 2004/05, will further the need to manage capital expenditures as efficiently and effectively as possible. Public agencies, such as school boards, will have to become more innovative in the delivery of their services and seek alternative means of procuring and managing the capital assets they require for service delivery.

One of the core businesses of the Ministry of Education is to allocate funds for the K-12 public education system. These funds include capital funding for school construction and operating funding for ongoing renovations and upgrading required to maintain the condition of existing capital assets. The Ministry is responsible for all aspects of the management of the capital procurement process, with all costs associated with capital and operating funding incorporated within its operating budget. This includes any debt service costs associated with long-term debentures and the amortization of capital expenditures.

To better execute its responsibilities, the Ministry has recently undertaken a number of changes in the capital planning process. In 2003/04, the Ministry implemented its first three-year capital plan. It is expected that by providing school boards with a multi-year funding commitment, this will enable better long-term planning for school districts and allow for better coordination of maintenance expenditures with known replacement and rehabilitation plans.

In 2002, Government developed a new Capital Asset Management Framework that was intended to establish standards for planning and management of public infrastructure, and create a new approach to service delivery and capital procurement. A primary feature of this new approach was the pursuit of alternative service delivery and public-private partnership opportunities.

The Ministry has newly implemented its own capital asset management framework (CAMF), in accordance with Treasury Board direction. This framework transfers the accountability and responsibility for capital expenditures to school boards while retaining the Ministry's broader accountability for ensuring that public schools are built and maintained in a cost-effective manner. In addition to the implementation of a multi-year capital funding system, other key objectives incorporated into the Ministry's new CAMF include:

- Allowing school boards to be more responsive to the needs of their communities and to be more creative in seeking solutions
- Establishing adequate accountability measures to ensure allocated resources have been utilized in a cost-effective manner
- Eliminating unnecessary regulations

Under the Ministry's CAMF, school districts are still expected to develop long-term capital plans in order to determine their existing and future needs for capital and operating purposes. The Ministry's role will continue to be assisting school boards in the capital planning process. Ministry responsibilities include:

- Creating the legislative framework, establishing policy, and providing advice regarding the planning and maintenance of capital assets
- Establishing criteria for evaluating capital project requests from school boards
- Securing capital funds or other means of capital procurement

- Allocating available resources for capital projects fairly, based on school district needs and Government objectives.

1. Operating Funding – Facilities Operations and Maintenance, and School Renewal

Government accounting policies define operating and maintenance expenditures (as distinct from capital expenditures), and the appropriate source of funding for each category. Projects that involve the creation of new assets or the replacement of existing assets qualify for capital funding support. Many smaller projects involving capital improvements or renovations required to maintain a capital asset during its economic life are classified as operating projects, and do not qualify for capital funding. Funding for such operating projects is provided from the Ministry's annual operating budget.

The term "maintenance" can be used to describe a range of activities, including:

- Inspections
- Preventive maintenance (planned)
- Repairs due to normal wear and tear (unplanned)
- Building component rehabilitation (upgrading or replacement).

Funding for regular operations and maintenance (inspections, preventive maintenance and repairs) is provided to school districts as part of their per-pupil General Operating Grant. Funding for building component rehabilitation is referred to as *School Renewal* funding. The Ministry provides school renewal funding to school districts to prevent the premature deterioration of their capital assets and to ensure school facilities remain in usable condition for their intended lifespan.

School Renewal funding is allocated to all school districts through the Annual Capital Grant (ACG). School districts are expected to establish a long-term maintenance plan and coordinate their ACG expenditures with their regular operations and maintenance activities, local capital expenditures and any major capital replacement or rejuvenation projects. School districts are also expected to manage any emergent health or safety expenditures within the allocated funds.

In addition to the replacement or upgrading of building components, facilities will occasionally be in need of upgrades to meet changes in various building codes and safety requirements, and modifications to provide access for persons with disabilities. As well, remedial work may be needed to address indoor environment quality problems identified in schools. Independent expert evaluations and risk assessment must be undertaken to identify the appropriate scope of work and all potential costs of such projects. The resulting information should be incorporated into the district's long-term maintenance program.

Allowable ACG expenditures include the following:

- Roof replacement
- Improvements to protect the building fabric
- Mechanical and electrical upgrades
- Loss prevention (fire protection, alarms)
- Health and safety upgrades
- Structural and non-structural seismic upgrades
- Functional improvements
- Technology infrastructure upgrades
- Access for persons with disabilities
- Asbestos abatement
- Upgrades to existing site improvements
- Site servicing.

For further details on the ACG, please refer to the Annual Capital Grant Policy (issued May 31, 2002), which is available on the Ministry Policy Site at:

http://www.bced.gov.bc.ca/policy/policies/annual_cap_grant.htm

For 2004 – 2007 the ACG allocation is \$110 million annually over the three year period. Following the recommendation of the 2003/04 Technical Review Committee, the ACG formula for 2004/05 was based on the replacement cost of school area required to house current student enrolment. A standard area per student based on Ministry space allocation for elementary and secondary schools will be applied to the construction unit rate, adjusted for location. Factors for average district facility age, and low enrolment consistent with the Ministry's Operating Grant formula, will also be applied. For communities that qualify for the Ministry's Small Community Grant, 50% of unused school capacity will receive ACG recognition. For this cycle, ACG calculation will be based on student enrolment and school inventory as at September 30, 2004.

2. Capital Funding

Each year, school boards are required to submit a capital plan providing details on high priority projects required within the three-year timeframe of the plan. As a result of the accounting changes around capital and operating funding, only capital projects need be included in a capital plan submission. Eligible capital projects include the provision of new educational space required for enrolment growth, and the replacement or rehabilitation of existing school facilities that have reached the end of their economic and functional life.

Upon receipt of all school boards' capital plan submissions, the Ministry analyzes individual capital project requests using published technical criteria. Each request is then assigned a priority ranking on a provincial basis. Based on further detailed analysis of the highest priority requests, the Ministry establishes a long-term capital plan that will inform the approval decisions of the Minister.

Capital Cost Drivers

Two primary capital cost drivers should be considered in the management of a school board's capital asset base:

a) Enrolment Changes:

Changes in enrolments can affect capital planning in three ways:

- Enrolment may increase, requiring school districts to:
 - better utilize existing program space
 - implement efficiency scheduling to increase functional capacities of existing schools
 - undertake alterations or renovations of existing space
 - acquire or relocate portable classrooms
 - provide new space through the construction of new facilities or the addition to existing schools
- Enrolments may decline, resulting in the inefficient use of one or more schools. Potential for facility consolidation or the need to dispose of surplus capital assets should be considered.
- Enrolment may remain constant, although populations may shift from one part of the district to another, thereby creating a need for additional space in one area and a surplus of space in another area.

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 develops ten-year enrolment projections based on the analysis and interpretation of data from BC Stats. School districts are required to provide projected enrolment at individual schools so that the sum of the individual schools agrees with the Ministry projections. School districts may choose to develop their own ten-year projections based on local knowledge of future development and enrolment trends; however, these may only be entered into the CP3 forms upon written agreement from the Ministry of Education planning officer.

School districts are required to develop a capital plan based on a ten-year projection horizon to allow identification of future site acquisition needs. All districts then requesting the acquisition of new school sites or the expansion of existing school sites, due to enrolment growth being generated by new residential development, must have a school site acquisition charge (SSAC) in place before the Ministry will support a site request. Once SSACs have been established in a school district, subsequently updated ten-year enrolment projections will inform the annual consultations with local governments regarding the need for new school sites and the calculated values of the per-unit school site acquisition charges.

Changes in facility usage and educational programs may necessitate space modifications (e.g., plans to convert a junior secondary school to a full secondary school; or reconfiguration of elementary schools to middle schools). When the use of a facility is expected to change in this manner, the school district must identify the type of change; how the change affects existing facilities; the estimated costs of conversion; and when this change is likely to occur. Funding for these types of space modifications is typically regarded as an operating expense, rather than a capital expense. Where there are capital expenditures associated with proposed changes in facility usage, decisions need to be supported by a business case that compares capital needs based on the *status quo*. If no capital funding is

available, then such high priority projects must be self-financed by the school board, typically through the disposal of surplus assets.

(b) Facility Age and Building Condition

Where facilities have been maintained in accordance with a long-term maintenance program, but have reached the end of their functional or economic life, building rejuvenation may be required to return them to an appropriate working condition. Alternatively, replacement of existing facilities may be required. The Ministry considers facility audit data to identify potential candidates for replacement or rejuvenation. Further analysis is then required to determine the most cost-effective option, based on capital and life-cycle cost assessments, functional and educational program requirements, energy and operating efficiency, and life expectancy targets.

To qualify for capital funding, rejuvenation or replacement project requests must exceed \$1.5 million. Any renovation projects less than \$1.5 million should be managed within the School Renewal program, with work scheduled over several years, if necessary, to complete the project.

Student Transportation Services

School buses are considered capital assets, and any new or replacement buses will be funded as part of a school board's capital program.

3. The New Capital Planning Framework

(a) Multi-Year Funding

Capital project requests for new schools, new school sites, additions, site expansion, replacement or rejuvenation will be considered for support in the third year of the Ministry's 2005/06 Capital Plan. Projects previously supported in the second and third years of the Ministry's 2004/05 Capital Plan will comprise the first and second years, respectively, of the 2005/06 Capital Plan. Only capital requests for new buses and bus replacements will be considered for support in the first year of the 2005/06 Capital Plan.

The advantages to supporting projects over a three-year capital plan include:

- Better long-term planning for school districts
- Coordination of maintenance expenditures with replacement and rehabilitation approvals
- Early identification of prospective candidates for evaluation of public-private partnership (P3) options.

Additional benefits to multi-year funding support include the ability to complete the two-phase feasibility studies that are required for all supported projects. The feasibility study is intended to confirm the project rationale, define the appropriate project scope, determine firm project costs, explore P-3 opportunities, set out project scheduling, assess the school district's project management expertise, and identify areas of risk.

(b) Capacity Utilization of Existing Schools

School districts must be able to demonstrate that they are using their existing school facilities efficiently before ministerial support may be given to increase school space. Previously, Ministry priorities for new space requests were based on a capacity and enrolment analysis of surrounding schools, with less consideration given to the broader context of capacity utilization at the district level. School districts are now 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.

Capacity utilization thresholds

A minimum threshold has been established by the Ministry for capacity utilization at the school district level before any school district is eligible for new space. The capacity utilization analysis is based on the existing inventory of schools (including new schools and additions approved in previous capital plans) and school district enrolment projections. Capacity is defined as the operating capacity of each school, which is a function of the nominal capacity, grade configuration and class sizes. Average class size provisions for Kindergarten and the primary grades, as established by *The Public Education Flexibility and Choice Act*, are incorporated into the operating capacity calculation. The operating capacity for Grades 4 to 12 is based on the nominal capacity (i.e., 25 students per classroom).

For any new space request to be considered, projected enrolment must be increasing over five to ten years. To be eligible for new elementary or secondary space, a school district will have to exceed the district average threshold in addition to either the elementary or secondary threshold. The capacity utilization thresholds will be applied at the school district level. Where travel distances are significant, or where there are local needs for additional space, consideration will be given to alternative scenarios proposed by the school district.

Table 1: Minimum Percentage Utilization Requirements (based on Operating Capacity)			
FTE Enrolment	Elementary (Gr. 1-7)	Secondary (Gr. 8-12) ¹	District Average
> 7,500 (and all urban districts)	100%	110%	95%
5,000 to 7,499	95%	105%	90%
1,500 to 4,999	90%	100%	85%
< 1,500	80%	90%	75%

Note: [1] Secondary utilization rate assumes the implementation of efficiency scheduling.

Efficiency Scheduling

Efficiency scheduling in secondary schools (e.g., extended days, year-round schooling) is considered as a prerequisite for any secondary school expansion. As a result, the capacity utilization percentage for secondary space has been set at a higher threshold. Where demand exceeds existing capacity, the over-capacity schools will be expected to be operating at a greater efficiency, and new space will be considered only if warranted by increased enrolment projections. For an addition to an existing secondary school, it will be expected that the school will be operating on a more efficient schedule. If a new secondary school is proposed for a growing area, the surrounding schools will be expected to be operating more efficiently before any new space can be justified.

Replacement and Rejuvenation

Capital plan requests for replacement or rejuvenation of an existing school will be evaluated based on the following two criteria:

- facility audit score
- capacity utilization analysis

The initial priority for replacement or rejuvenation of a school will continue to be determined by the facility audit data. However, if the Ministry determines that a school is a high priority for replacement, support will be contingent upon a capacity utilization analysis of surrounding schools. Replacement or rejuvenation of a school will not be supported if there is space available at nearby schools to accommodate all of its current student enrolment and it will not be required for future enrolment growth. Alternatively, a reduction in existing capacity (i.e., a smaller replacement or inventory reductions) may be required as a condition of support for a requested replacement or rejuvenation. Any increase in capacity for a replacement school must be supported by a capacity utilization analysis.

School Consolidations

Schools districts experiencing continued declining or shifting enrolments may want to reduce the inefficient use of school facilities through consolidation to fewer locations. The Ministry will consider renovation or, 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, and capacity. School districts will be required to demonstrate potential savings in operating costs and provide support for the requested capital project through the sale of surplus assets, where applicable.

Structural Seismic Mitigation

The Ministry is committed to improving the safety of our public schools through the mitigation of seismic risks. This mitigation work includes structural upgrading projects that make existing schools more resistant to earthquakes, and non-structural seismic upgrading that reduces any hazards within schools, such as the securing of light fixtures and the protective filming of windows.

In preparation for the implementation of new seismic mitigation projects in 2006, the Ministry wishes to complete a comprehensive assessment of all public schools in high-risk seismic zones in 2004. These assessments will assist the Ministry in the preparation of an implementation plan and funding options for a long-term seismic mitigation program.

School Boards located in high risk seismic zones of the Province are expected to undertake the required seismic risk assessments using a standard assessment approach. These assessments will focus on school facilities infrastructure that was constructed prior to 1990 or designed under former building codes. The Ministry has been developing a new seismic assessment tool with the assistance of a technical working group of engineers, who are members of the Association of Professional Engineers and Geoscientists of British Columbia (APEGBC), and are experienced in seismic mitigation assessment. The Ministry will be assisting Boards by pre-qualifying engineers to perform these assessments, and coordinating a training program with APEGBC. School Boards are expected to enter into contracts with engineering consultants who meet these qualifications and have completed the training. The Ministry will provide funds to Boards to undertake this assessment work. Data gathered through these assessments is to be submitted to the Ministry by the deadline of **October 15, 2004**.

The Ministry of Education is working with School District No. 36 (Surrey) to coordinate the assessment process on behalf of the Ministry. The final electronic version of the assessment tool will be provided to School Boards by mid-June. It is anticipated that the Surrey School District will provide advice to Boards on use of the assessment tool, monitor the progress of all assessments, and be available as a resource to boards to coordinate these assessments on their behalf. This optional service would include the consultant selection process, provision of standard documentation required for contracts and assessment procedures, contract monitoring, review of progress payments and assistance with the submission of assessment data to the Ministry.

Results from these assessments will be incorporated into the Ministry's facility audit program to help ensure that Ministry funding addresses the highest priority needs among the older schools in the Province, including school replacement, rehabilitation and seismic upgrading. Data gathered from these assessments will also be used in a seismic mitigation research project to be undertaken by APEGBC in conjunction with the University of British Columbia.

School Boards will be expected to incorporate the results of their seismic assessments in the development of their Capital Plan submission for 2005/06. High priority seismic mitigation projects will be considered for implementation in 2006/07.

PART II: DEVELOPING THE 2005/06 CAPITAL PLAN

2005/06 Capital Plan Timelines

2005/06 Capital Plan Timelines	
June 2004	<ul style="list-style-type: none"> • <i>2005/06 Capital Plan Instructions</i> resource materials available on the Ministry of Education Capital Planning Resources webpage
June - September	<ul style="list-style-type: none"> • Ministry of Education updates unit rate factors for escalation and location. • Planning Officers work with school district staff in developing 2005/06 Capital Plan submission
October 15th	<ul style="list-style-type: none"> • School boards submit 2005/06 Capital Plans to Ministry, including: <ul style="list-style-type: none"> ♦ completed capital planning (CP) forms ♦ all hardcopy documentation to support project requests ♦ School board resolution adopting capital plan submission • School boards submit school site acquisition plans (including eligible school site proposal) to Ministry, as required under the provisions of school site acquisition charge legislation
October - December	<ul style="list-style-type: none"> • Ministry reviews all submissions and applies provincial ranking criteria to funding requests
December	<ul style="list-style-type: none"> • Ministry notifies school districts of assigned provincial project rankings; rankings are then confirmed or jointly refined • School boards notified of approved site acquisition projects, allowing school boards to establish school site acquisition charges, if required
January – March 2005	<ul style="list-style-type: none"> • Minister of Education reviews and approves recommended project list
Spring 2005	<ul style="list-style-type: none"> • Ministry informs school boards of supported capital projects

Capital Funding and Operating Funding

Boards are reminded that only projects requiring capital funding need to be submitted in their capital plan. Allocation of operating funds (i.e. Annual Capital Grant) will be determined annually by the Ministry. Capital projects may be funded from five major sources:

- Public – Private Partnerships (P-3's)
- Prepaid Capital Advances (PCA's)
- Capital Reserve (ministerial approval required for expenditure)
- Land Capital Reserve Trust Fund (ministerial approval required for expenditure; school site acquisitions only)
- Local Capital (ministerial approval not required for expenditure)

Capital Plan Submission

A school board's Capital Plan should reflect a strategy for balancing the supply of existing facilities with enrolment projections, while maintaining a functional asset base. The Ministry has developed a series of forms and reports to assist school districts with their plan development and submission, and access to these is provided to school districts on a web-based system. The following steps should be part of the capital planning process.

When reviewing long-term needs, school districts should assess their existing capital asset base and determine whether the use of current assets can be expanded or improved, thereby reducing the need for new (or existing) assets. Districts need to ensure that the nominal capacities of their schools have been updated to reflect the current ministry space standards.

Enrolment projections for the next ten years need to be developed to assess the demand for new facilities or to determine any potential over supply. When the demand for facilities exceeds the supply within a 10-year planning horizon, capital projects should be planned such that long-term supply will keep pace with long-term demand. (Short-term fluctuations in demand should be accommodated by short-term supply solutions, such as portable classrooms or operating leases.) If the supply exceeds long-term demand, options should be considered to reduce supply through the disposal of surplus facilities not needed for current or future educational purposes.

The Ministry prepares ten-year enrolment projections for the province and for each school district, based on population trends identified by BC Stats. School inventories and school district projections are reported in the **CP-3 School District Summary of Capacities and Projected Enrolment Form**. School districts should use this form to enter their ten-year enrolment projections on an individual school basis for kindergarten, elementary and secondary students.

Capital rejuvenation or replacement requests included in the Capital Plan must be supported by the results of facility audits assessing the condition of existing school buildings. Audits on all school districts' buildings should be completed, using the Revised Facility Audit Manual.

When capital projects are requested in a school board's Capital Plan, a **CP-1 Capital Project Request Form** must be completed for each project. Supporting documentation for the project requests must also be provided as part of the Capital Plan submission.

Each project request will appear on the **CP-2 Five-Year Capital Plan Summary**, which should form the basis of the submission that is approved by the board.

For the purposes of mandatory school site acquisition legislation, an eligible school site proposal must be forwarded to the Ministry as part of a school board's Capital Plan submission. School site acquisition charges are established by school boards based on the value of Ministry-approved eligible school sites. For further information, refer to the **Implementation Guide: School Site Acquisition Charge**.

Estimating Project Budgets for Capital Planning Purposes

Area Standards

The Ministry of Education – Area Standards (03/99) are incorporated into the CP-1 Project Request Forms. Two versions of the form (Elementary and Middle & Secondary Space Projects) are linked to space standard tables according to the specified facility type. Space requests are entered in the design aid sheets, which are linked to the tables for elementary, middle or secondary schools.

Allowances, Rates and Costing Factors

All factors associated with the development of capital budgets will be published in the **2005/06 Capital Plan Allowances, Rates and Costing Factors Supplement**. These will be updated to adjust project budgets prior to the signing of the Project Agreement.

Unit Rate

An estimated capital budget will be calculated for each school construction project (i.e., new schools, additions to existing schools, and renovations to existing schools) included in a Capital Plan on the basis of a unit rate for construction. There are separate unit rates for elementary, middle and secondary schools. These will be updated to adjust project budgets prior to signing the Project Agreement.

Note: Unit rates do not apply to administration and maintenance facilities, which must be considered for budgeting on an individual project basis.

Supplementary Building Allowance

School districts are required to determine the ground conditions of a site prior to its acquisition, as outlined in the Ministry's **School Site Selection Guide**. Where an unusual ground condition exists, a preliminary analysis of the site condition and its associated costs will be required prior to acquisition of the site.

The unit rate used to provide a budget estimate of construction costs for a capital project assumes a level site with normal load bearing capacity. An appropriate ground factor should be selected to reflect the abnormal site conditions within the building footprint.

Site Development and Supplementary Site Allowances

A Site Development Allowance has been developed for different sizes of new buildings and additions. This allowance is intended to provide for the completion of most items associated with the scale of development, with the exception of roads, parking and any additional costs associated with any abnormal site conditions. The Supplementary Site Allowance must be calculated separately to include those items not covered under the Site Development Allowance.

Development Cost Charges and Off-Site Service Charges

School districts must comply with Government guidelines related to funding support for local government Development Cost Charges, off-site service charges, and bylaw requirements. For further details, please refer to the Capital Project Budget Guidelines for Local Government Service Charges and Bylaw Requirements (issued September 15, 1994), which is available on the Ministry Capital Planning Resources webpage at:

<http://www.bced.gov.bc.ca/capitalplanning/resources.htm>

Planning Fees

For the purposes of capital planning, planning fees for school projects will be calculated as a percentage of the estimated construction and site development costs. Basic fee rates of 10 percent for new construction and 16 percent for renovations have been set for new project requests. Planning fees for new construction are further subject to adjustment, based on project size, on a sliding scale.

Equipment and Freight Rate Allowances

Equipment allowances for elementary, middle, and secondary schools are determined as a percentage of the base budget rate for construction. For replacement or rejuvenation projects, the equipment allowance is based on 25 percent of the equivalent new allowance. A Freight Rate Allowance is included to reflect the variations in shipping costs associated with the acquisition of equipment.

Location Factors

Costing factors for location have been developed for all school districts, with some allowances for variations within specific school districts. The Location Factor is based on a combination of two variables. The Geographical Factor includes an allowance for climate, amount of snow and/or rain, and seismic zone. The Economic Factor reflects market conditions for building construction.

Feasibility Study Funding

Upon notification that a school board is initiating a 'Feasibility Study', the Ministry will provide funding for the feasibility study from its operating budget. Site acquisition projects will receive \$25,000. New space, renovation and replacement projects will receive the following funding:

- For construction costs less than or equal to \$5,000,000:
 - ♦ 3.5 percent of the construction cost to a maximum of \$50,000
- For construction costs greater than \$5,000,000:
 - ♦ 1.0 percent of the construction costs

Actual costs for a feasibility study that are in excess of the funding amounts provided may be included in the 'Project Agreement' budget.

Portable Classrooms

Portable classroom space required for short-term use is considered as a capital asset. As part of Government's portable classroom reduction initiative, school districts will not be funded for the purchase of a new portable through the Ministry's Long-Term Capital Plan. Rather, needed portables will be obtained from the Province's inventory of surplus portables.

School Buses

School buses are considered capital assets and will be funded as part of a school board capital program. All funding requests for school bus acquisitions that are included as part of a school board's Capital Plan submission will be considered on an individual basis. Where approved by the Ministry, bus acquisition funding will be based on a capital allowance.

(See **Appendix F - School Bus Tender Specifications Document**)

Replacement of an existing school bus will be considered when:

- a minibus is 10 years old with at least 250,000 km.;
- a conventional bus (24 to 72 passengers) is 12 years old with at least 325,000 km.;
- 84-passenger bus is 15 years old with at least 400,000 km.; or
- none of the above apply, but the need for replacement can be substantiated.

Funding requests for school buses will be considered for inclusion in the Ministry's Long-Term Capital Plan only where school districts have submitted all supporting documentation.

- for additional buses for new routes or trips, documentation includes rationale for the request, and copies of route sheets and route maps
- for replacement of existing buses, documentation includes the latest inspection report
 - ♦ if bus replacement is earlier than provided in Ministry guidelines, documentation also includes rationale for the request and maintenance costs record
 - ♦ where the capacity of a replacement bus is to be upgraded, documentation includes rationale for the request, and copies of route sheets and route maps.

Note: Once a bus has been replaced, it may not be used for any permanent routes.

Transportation Services Inventory

The Ministry needs to accurately identify the need for school bus acquisitions in its future capital envelope allocations. To assist in this evaluation, a current inventory of all buses and vehicles used for providing transportation services should be provided with the 2005/06 Capital Plan submission.

Information on the following should be included:

- active buses (on regular routes)
- spare buses (used for emergencies, temporary overloads, or temporary routes)
- sports buses (originally funded by the Ministry for regular routes)
- leased temporarily (to assess if need is permanent or until new bus delivered)
- leased out (to a school within the district, independent school or another district)
- cannibalized for parts
- disposed this year
- contracted buses (on regular routes)
- taxis
- boats

For each board-owned vehicle, please include the Ministry Identification Number, Serial Number, capacity, year, and status (i.e., on regular route; spare; sports bus; leased; disposed; or used for parts). Where detailed information can not be obtained from contractors, please provide the number and capacities of vehicles used on regular routes.

Ministry Identification Number Determination

The four-digit numbering of buses is to be determined by the school districts, as follows:

- a) The first digit will be the last number of the Capital Program year.
(e.g., “4” for the 2003/2004 Capital Program year)
- b) The second and third digits will be the school district number.
(e.g., “08” for Kootenay Lake; “22” for Vernon)
- c) The last digit will begin numbering with “0” and go up to as many buses as were approved in the school district’s Capital Program for that specific year.
(e.g., if one bus was approved, only “0” would be used for the last digit of the ID Number for that bus; if 4 buses were approved, “0” to “3” inclusive would be used as the last digits of the ID Number for those 4 buses. Approval of more than 10 buses for a school district in a single Capital Program year is not expected in the near future.)

Examples:

<u>School District.</u>	<u>Bus(es) Approved</u>	<u>Ministry ID Numbers</u>
S.D. 8 (Kootenay Lake)	3 buses	3080, 3081, 3082
S.D. 79 (Cowichan Valley)	2 buses	3790, 3791
S.D. 57 (Prince George)	10 buses	3570, 3571, 3572, 3573, 3574, 3575, 3576, 3577, 3578, 3579
S.D. 91 (Nechako Lakes)	1 bus	3910

Mandatory Documentation for Capital Plan Submissions

The following table provides a summary of documentation that must be submitted in support of capital project requests for a variety of capital projects included in a Capital Plan submission to the Ministry:

Mandatory Supporting Documentation for Capital Project Requests	
Type of Project	Supporting Documentation
New Instructional Space	<ul style="list-style-type: none"> • Additions: <ul style="list-style-type: none"> ♦ line drawings of existing facility ♦ design aid sheet ♦ CP-4 School Capacity and Enrolment Worksheet • New Space: <ul style="list-style-type: none"> ♦ design aid sheet ♦ CP-4 School Capacity and Enrolment Worksheet
Replacement or Major Rejuvenation	<ul style="list-style-type: none"> • line drawings of existing facility • design aid sheet • CP-4 School Capacity and Enrolment Worksheet <ul style="list-style-type: none"> ♦ building condition score, using revised Ministry of Education's Facility Audit
Site Acquisition	<ul style="list-style-type: none"> • CP-4 School Capacity and Enrolment Worksheet
Bus Acquisitions	<ul style="list-style-type: none"> • New: rationale for request; copies of route sheets and route maps • Replacement: inspection report verifying age, condition and kilometers <ul style="list-style-type: none"> ♦ if replacement earlier than Ministry guidelines, include rationale and maintenance costs record ♦ where capacity is being upgraded, include rationale, and copies of route sheets and route maps