



Ministry of Education

**2002/03**  
**Five-Year Capital Plan**  
**Instructions**

Capital Planning Branch  
April 2001

## **PART I: AN OVERVIEW**

In terms of funding school construction and improvements, the Provincial Government and local school boards share responsibility for ensuring that public schools provide the best possible learning environment for students. At the same time, the public education system is required to provide a complete and accurate accounting of its use of public funds. Consequently, there is a shared accountability objective to allocate resources in a cost-effective manner, as well as an equity objective that seeks to have resources allocated fairly.

Capital funding is made available to school boards subject to various rules and policies. The intent of these rules is to establish accountability that the funds are being spent where they are most required and in the most cost-effective manner. The policies also assure that capital funds are allocated for legitimate capital projects, as distinct from operating and maintenance items, or other non-capital expenditures. Among the tests of fairness used in capital allocation are objective criteria for reviewing and ranking requested projects, as well as universal standards for school size and educational program specifications.

In the narrowest sense, the objective of capital planning by school districts is to secure the funding necessary to build, maintain and refurbish facilities. Capital planning is focused on determining existing and future needs, and working with the Ministry to meet those needs adequately in a timely fashion.

With respect to capital planning, the Ministry is responsible for:

- 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 to ensure the fair and equitable allocation of provincial capital funding
- securing capital funds and allocating them for capital projects fairly, based on school district needs and Government objectives

Each year, school boards are required to submit Five-Year Capital Plans that include details on projects they wish to undertake in the coming year. Upon receipt of all school boards' Five-Year Capital Plans, requests for the coming year are analyzed using published technical criteria and then assigned a priority ranking on a provincial basis. Based on detailed analysis of all requests, the Ministry then establishes a long-term capital plan that will inform the approval decision of the Minister. The plan reflects strategic objectives related to the provision of new space, reduction in the number of on-site portables, accommodating reduced primary class sizes, addressing of health, safety and accessibility issues, and maintenance of the capital stock to a consistent standard in all regions of the province.

The Ministry's long-term capital plans -- along with the long-term capital plans from other social capital ministries -- are then brought forward to Treasury Board, whereupon the appropriate allocations to the different social capital sectors are determined in accordance with the strategic priorities and goals of Government.

Government will continue in its efforts to deliver the range of necessary services with limited available resources, which necessarily involves individuals, stakeholder groups and communities understanding the difficult choices that must be made around prioritizing capital expenditures. To meet the challenge, Government must be able to demonstrate clearly to taxpayers that the social capital programs are efficiently producing the results they were designed to achieve.

For school districts, this means demonstrating real needs, managing demand, optimizing capital and operating costs, and ensuring that capital allocations are spent within the established limits and for the purposes authorized. This translates into specific performance targets, such as reducing the cost of acquiring school sites, extending the useful life of existing facilities, maximizing facility utilization, managing the demand for new space, reducing operating costs through increased efficiencies, and working to reduce the costs of school planning and construction.

### **The Need for Capital Investment**

In the normal course of events, the following four circumstances impact the capital planning for a school district and management of a school board's capital asset base:

#### **1. Changes in Enrolments**

Changes in enrolments can affect capital planning primarily in three ways:

- Enrolment may increase, requiring school districts to:
  - provide new space through construction of new facilities or additions to existing schools
  - better utilize existing program space
  - undertake alterations or renovations of existing space
  - implement efficiency scheduling to increase functional capacities of existing schools
  - acquire portable classrooms
  - acquire school buses
- Enrolment may remain constant, although populations may shift from one part of the district to another thereby creating the need for space in one area and a surplus of space in another.
- 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 may result.

Changes in enrolment can be predicted with a reasonable degree of accuracy in the short term. However, this accuracy declines as the projected period is increased. This is especially important for capital planning, since the ability to predict the supply and demand for facilities over the long-term avoids potentially costly short-term solutions. School districts are expected to match each of its schools' existing operating capacities with both current and projected enrolments. Enrolments should be estimated over the next 10 years to determine all capital requirements for a five-year capital planning period, including site acquisitions.

As the accuracy of annual enrolment projections declines over the projection period, capital requests for new space in Year Two through Year Five will be less exact. Since the Five-Year Capital Plan is reviewed and updated on an annual basis, more accurate enrolment projections will always be available for Year One projects (i.e., those projects for which school boards are proposing to be included in their upcoming annual capital program and therefore seeking immediate Government's funding support).

## **2. Changes in Building, Safety or Health Requirements**

Facilities occasionally need upgrades to meet changes in various building codes and Workers' Compensation Board requirements, and modification to provide access for individuals 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 is necessary to allow school boards and the Ministry to properly determine their short and long-term capital funding priorities.

## **3. Deterioration of Facilities**

School districts are expected to follow a long-term maintenance program to prevent the deterioration of their capital assets and to ensure school facilities remain in usable condition for at least their intended lifespan. The long-term maintenance program will be supported through annual operations and maintenance funding (provided under the Financial Allocation System); minor maintenance capital projects; Annual Capital Allowance capital projects; and local capital funding.

Where facilities have been maintained in accordance with a long-term maintenance program, but have deteriorated beyond what would be expected for their age, building rejuvenation may be required to return them to an appropriate working condition. A request to replace or rebuild an existing school will be considered only where facility audit and feasibility study results demonstrate that the replacement/rebuilding is the most cost-effective option, based on capital and life-cycle cost assessments; comparative functional and educational program requirements; energy and operating efficiency; and life expectancy targets..

Under the *Workers' Compensation (Occupational Health and Safety) Amendments Act, 1998*, school boards were required to prepare a Compliance Plan within the first year of enactment of the new Occupational Health and Safety Regulation (effective April 15, 1998). This Compliance Plan must be integrated within a school board's Five-Year Capital Plan.

Additionally, a Preventative Maintenance Plan is required under the indoor air quality provisions of the Workers' Compensation Board Regulation and must also be incorporated into the long-term capital plan for each school district.

## **4. Class Size and Portable Reduction Initiative**

As part of the British Columbia Teachers' Collective Agreement, Government has undertaken a K-3 class size reduction initiative. Under this initiative, new classrooms will be built to reduce class sizes in Grades K-3 to 18 students. Government also intends to build enough additional classrooms to reduce the number of on-site portable classrooms by one-half by 2003.

School districts must closely review projected enrolments and the capacities of existing schools (based on the incremental reduction in K-3 class sizes to 18 students by 2002/03) to properly identify building additions required to meet the Ministry's three primary objectives:

- accommodating future enrolment growth;
- accommodating new primary class size arrangements; and
- reducing the number of portables at existing schools.

Requests for expansion projects required to accommodate anticipated enrolment growth, K-3 class size reduction initiative, and portable reduction initiative should be identified in a Five-Year Capital Plan submission.

## 5. Changes in Facility Usage and Programs

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; 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 it affects existing facilities, the estimated costs of conversion, and when this effect is likely to occur. Projects that increase utilization of planned spaces will receive higher priority ranking consideration for inclusion in the Ministry's Long-Term Capital Plan.

## Capital Projects and Capital Funding

Capital projects are funded from six major sources:

1. **Capital Plan Allocations** - provided annually by Government.
2. **Annual Capital Allowance** - funding provided annually for specific categories of projects, which extend the life of existing school buildings.
3. **Capital Reserve** - school board capital funds from a variety of sources, including the sale of surplus capital assets (where provincial funding was used in whole or in part to acquire the asset); revenue from leases of school board-owned assets; and earned interest.
4. **Land Capital Reserve Trust Fund**- funds collected from developers or proceeds from disposal of land acquired from developers, used for the acquisition of approved school sites.
5. **Local Capital Reserve** - capital funding received from:
  - sale of local capital assets (where no provincial funding was used to acquire the asset);
  - local revenue;
  - referendum taxes; and
  - school boards' operating budget or other allowances designated by the Minister.
6. **Seismic Mitigation Program Funding** - Government's pilot Seismic Mitigation Program, administered by Seismic Mitigation Branch, Ministry of Finance and Corporate Relations, provides capital funding for both non-structural and structural mitigation work in 2001/02 and 2002/03 for school districts in higher seismic risk regions of the province.

Notably, only projects that will use capital plan allocation, Capital Reserve, or Land Capital Reserve funding should be included in a 2003/03 Five-Year Capital Plan. Projects normally funded from Annual Capital Allowance, Local Capital Reserve, Seismic Mitigation Program, or school district operating budgets should not be included.

## Major and Minor Capital Projects

Capital projects funded from the Ministry's capital plan allocation are designated as either 'major' or 'minor' on the basis of the estimated total project cost:

- Minor Capital Projects - total project costs up to \$1.5 million
- Major Capital Projects - total project costs equal to or greater than \$1.5 million

**Note:** Similar minor projects may not be consolidated as 'various schools', but must be submitted as separate project requests.

Funding requests for any minor project estimated at less than \$75,000 should not be included in the Five-Year Capital Plan submission. Alternatively, these minor projects may appropriately be funded using Annual Capital Allowance or local capital sources.

Under the project planning approval process administered by the Capital Division, Capital Division, Ministry of Finance and Corporate Relations, all major capital projects proceed through both planning and completion once they receive Government approval. This effectively reduces a single project to two phases:

- Phase 1:        Site (if required)
- Phase 2:        Planning/Completion

For more information on policies and procedures related to approved capital projects, please contact your Education Project Manager, Capital Division.

<b>REVISED FIVE-YEAR CAPITAL PLAN TIMETABLE</b>	
<b>April 2001</b>	<ul style="list-style-type: none"> <li>• <i>Five-Year Capital Plan Instructions</i> resource materials made available to school districts on Ministry of Education Capital Planning Resources webpage</li> </ul>
<b>April - June</b>	<ul style="list-style-type: none"> <li>• Planning Officers work with district staff to develop Five-Year Capital Plan submission</li> </ul>
<b>June 29<sup>th</sup></b>	<ul style="list-style-type: none"> <li>• School boards submit 2002/03 Five-Year Capital Plans to Ministry, including completion of capital planning (CP) forms using the Ministry's web-based capital planning system and submission of all hardcopy documentation to support project requests</li> <li>• 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</li> </ul>
<b>June 30<sup>th</sup></b>	<ul style="list-style-type: none"> <li>• School districts submit facility audit results for all buildings to Ministry</li> </ul>
<b>July - September</b>	<ul style="list-style-type: none"> <li>• Ministry reviews all submissions and applies provincial ranking criteria to Year One funding requests</li> </ul>
<b>October</b>	<ul style="list-style-type: none"> <li>• Ministry submits its Long-Term Capital Plan and Capital Project Request list to Treasury Board</li> </ul>
<b>December</b>	<ul style="list-style-type: none"> <li>• Ministry notifies school districts of assigned provincial project rankings; rankings are then jointly refined</li> <li>• School boards notified of approved site acquisition projects, allowing boards to establish school site acquisition charges, if required</li> </ul>
<b>January – March, 2002</b>	<ul style="list-style-type: none"> <li>• Treasury Board reviews all social capital ministries' long-term capital plans</li> </ul>
<b>Spring 2002</b>	<ul style="list-style-type: none"> <li>• Ministry informs school boards of approved 2002/03 capital projects</li> </ul>

## **PART II: DEVELOPING THE FIVE-YEAR CAPITAL PLAN**

The Five-Year Capital Plan should reflect a strategy for balancing the supply of existing facilities with the demand for new space. Variables such as facility age and building condition, maintenance history, and utilization will have a bearing on the supply. Current and projected district-wide and facility enrolments, and the age profiles of students will dictate the demand.

The following steps should be part of the planning process:

1. Review school district's inventory in order to assess current and future capital requirements. The inventory should be a comprehensive profile of existing facilities, which includes information on capacities, design, age, and condition. This database will describe a district's 'supply' of facilities.
2. Assess 'demand' on existing facilities over the next 10 years using enrolment projection data provided by the Ministry (**Enrolment Report - Projection Report for Public School Aged Headcount Enrolments: Historical and Forecast Grade Information**). When 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, develop options to reduce supply through the disposal of surplus facilities not needed for current or future educational purposes.
3. If the supply of existing facilities is in a deteriorated, a capital rejuvenation program for returning facilities to a satisfactory condition should be developed. Such a program should be scheduled in a timely and efficient manner and be part of the school district's long-term maintenance program.
4. When capital projects are requested in a school board's Five-Year Capital Plan, a **CP-1 Capital Project Request Form** must be completed for each project using the Ministry's web-based capital planning system. Supporting documentation for the project requests must also be provided as part of the Five-Year Capital Plan submission.  
(See **Appendix A - Capital Project Request Form**.)
5. 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 Five-Year Capital Plan submission. School site acquisition charges are established by school boards based on the value of Ministry-approved eligible school sites.  
(Please refer to the **Implementation Guide: School Site Acquisition Charge**, available on the Ministry of Education Capital Planning Resources webpage.)
6. Project descriptions and estimated capital budgets for all capital projects included in a Five-Year Capital Plan must be completed using the Ministry's web-based capital planning system. (See **Appendix B - CP-2 Five-Year Capital Plan Summary**.)
7. All projects included in a Five-Year Capital Plan should be carefully reviewed to determine their potential for cost reduction and cost efficiency measures. Implementation of such measures will increase the provincial priority rating for those projects and enhance the likelihood receiving Government's capital funding support.  
(See following **Part III - Cost Reduction and Cost Efficiency Initiative**.)

**Note:** Projects that involve self-financing efficiency measures (i.e., measures that pay for themselves through reduced payments to utility companies and energy suppliers, and savings from quantifiable material savings) will be referred to the Green Buildings BC – Retrofit Program.

### **Assessing the Supply of Existing Facilities**

The capital asset base for school districts may include:

- school facilities (elementary, junior and senior middle, and secondary schools)
- support facilities (district administrative offices, building maintenance facilities, and vehicle maintenance facilities)
- portable classrooms
- school buses

When reviewing long-term needs, school districts should assess the existing capital asset base and determine whether the use of current assets can be expanded or improved, thereby reducing the need for new assets.

Capital rejuvenation requirements included in the Five-Year Capital Plan must be supported by the results of facility audits assessing the condition of existing school buildings. The urgency of rejuvenation work will be a major consideration when scheduling projects under a long-term maintenance program and making project funding requests in a Five-Year Capital Plan.

### **Assessing the Demand for Facilities**

Each school district should review the enrolment data provided for the web-based **CP-3 School District Summary of Capacities and Projected Enrolment Form**. The facility statistics, such as nominal capacity, reflects data from the Ministry's Facility Inventory. The historical enrolment reflects the approved student headcount enrolment with the following exclusions:

- Continuing Education
- Correspondence
- Home School Registrations
- Students Younger than School Age
- Students Older than School Age
- Offshore Students

If Ministry figures differ from enrolment projections assembled by the school district, this information should be provided to the Ministry along with supporting documentation. Such differences will receive individual review and an appropriate adjustment may be made to the web-based **CP-3 Form** enrolment projections.

## Site Acquisition

The Ministry expects school boards to complete the following actions as part of its long-term capital planning for school site acquisition:

1. Work with local government to examine the ten-year projection of residential development within common jurisdictions to determine whether such development will create a demand for new or expanded school sites. If such sites are required as a result of future residential development, the school board will need to set school site acquisition charges for its district, as provided under school site acquisition charge legislation. (For further information, please refer to the **Implementation Guide: School Site Acquisition Charge**, available on the Ministry of Education Capital Planning Resources webpage.)
2. Investigate the possibility of acquiring Crown land. This takes advantage of an existing protocol agreement with the Ministry of Environment, Lands and Parks that provides for the reservation and granting of school sites at a reduced cost to school boards. (See following **Part III - Cost Reduction and Cost Efficiency Initiative**.)
3. Seek to jointly develop facilities with other public and private agencies. The Ministry will give higher provincial priority rating to capital projects that will be cost-shared between local school boards and other user groups. (See following **Part III - Cost Reduction and Cost Efficiency Initiative**.)

The Ministry will consider a school site funding request only if a two-step analysis of potential sites, as established in the Ministry's **School Site Selection Guide**, has been undertaken. The school district must provide the following information:

- a) An indication of how the site was selected from other potential sites, if alternate sites are available;
- b) A summary of findings on all sites evaluated; and
- c) A description of the preferred site.

The acquisition of a site must be supported by the results of the evaluation process outlined in the **School Site Selection Guide**. (Please refer to the **School Site Selection Guide**, available on the Ministry of Education Capital Planning Resources webpage.)

The Ministry may approve a minor capital project to enable school districts to undertake a site analysis on a preferred school site prior to approving the school site acquisition funding request.

School boards must comply with current school site size standards specified for the maximum design capacity of a school. (Please refer to the **Ministry of Education Area Standards** available on the Ministry of Education Capital Planning Resources webpage.)

School boards must dispose of any excess land acquired as part of the school site purchase, with the proceeds used to offset the cost of the land acquisition.

## Space Utilization

School boards are encouraged to optimize the overall utilization of planned spaces for all approved middle and secondary school projects. To assist in this endeavour, the Ministry has developed an **Education Program and Space Utilization Guide** for use by school districts and their Planning Officers, which is available on the Ministry of Education Capital Planning Resources webpage. The process of evaluating education program and space utilization will be an important component of the ongoing capital planning process for school districts.

The standard method of calculating space utilization outlined in the **Guide** will support the school district's choice of elective academic/vocational instructional modules, as described in the Design Aid Worksheets. Following the **Guide** will ensure that the choice of elective modules accurately reflects education program requirements and that these facilities are utilized efficiently.

(Please refer to the **Education Program and Space Utilization Guide** available on the Ministry of Education Capital Planning Resources webpage.)

## Facility Audits

In 1994/95, school districts first completed Level 1 Facility Audits to assess the building condition of all schools in British Columbia. For 2000/2001, school districts began using a revised facility audit process to re-assess their inventory of school facilities. Initially, facility audits were required only for those renovation, alteration, replacement, rebuild and mechanical system upgrade projects for which funding is being requested in Year One of a 2001/02 Five-Year Capital Plan. Facility audits for the remainder of all school districts' buildings are to be completed by June 30, 2001. (Please refer to the **Revised Facility Audit Manual** available on the Ministry of Education Capital Planning Resources webpage.)

The resulting building condition scores for these projects will be an important factor in the Ministry's review of 2002/03 Five-Year Capital Plan submissions. Only those renovation, alteration, replacement, rebuild and mechanical system upgrade projects involving schools with the lowest building condition ratings, and which do not qualify under the Green Buildings BC - Retrofit Program, will be considered for funding support. (For more information on the Retrofit Program Eligibility Criteria, please refer to the Green Buildings BC – Retrofit Program website at: [www.greenbuildings.com](http://www.greenbuildings.com))

## Feasibility Study

Government is introducing a change in approval process for major renovation and renovation capital projects, commencing with projects approved in the 2001/02 Capital Plan. Prior to commencing design of an approved renovation/replacement project, the Ministry will work with a school district in determining the appropriate scope and budget through the completion of a feasibility study.

The intent of the feasibility study is to assess cost-effective renovation and replacement options - as based on a detailed assessment of the building condition - in a value management framework. Each option will be evaluated based on capital and life-cycle cost assessments; comparative functional and educational program requirements; energy and operating efficiency; and life expectancy targets. (For more information, please contact your Planning Officer)

## **Estimating Project Budgets for Capital Planning Purposes**

### 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 Five-Year Capital Plan on the basis of a unit rate for construction. For capital project budget estimating purposes, the base budget rates established by the Ministry of Finance and Corporate Relations for new school, addition and renovation projects - along with appropriate costing factors used in the calculation of project-specific unit rates - are provided in the **2002/03 Five-Year Capital Plan Allowances, Rates and Costing Factors Supplement**.

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

(For more information on unit rates, please contact your Educational Project Manager, Capital Division, Ministry of Finance and Corporate Relations.)

### 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 does not include a site factor as part of its calculation. All costs associated with an abnormal site condition within the building footprint must be identified separately and calculated as a supplementary cost to building construction. Costing factors reflecting the ground conditions, which affect building costs, are provided in **2002/03 Five-Year Capital Plan Allowances, Rates & Costing Factors Supplement**.

Where an unusual site condition has been included for a planning project, all supplementary building costs must be supported by an analysis of site conditions, (including estimated costs and alternative solutions) as part of the Ministry of Finance and Corporate Relations' value analysis process.

### Supplementary Site Allowance

For capital project budget estimating purposes, a site development allowance for all major capital projects may be determined using the **2002/03 Five-Year Capital Plan Allowances, Rates and Costing Factors Supplement**. The Supplementary Site Allowance covers premium costs for unusual ground or site conditions not covered under the Site Development Allowances.

### 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. A table of eligible charges is provided in the **2002/03 Five-Year Capital Plan Allowances, Rates and Costing Factors Supplement**.

### 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. In the interest of providing a level of funding sufficient to secure the required level of service and to ensure that project contingencies are not depleted prior to construction, Capital Division, Ministry of Finance and Corporate Division, undertook a review of the formula used to budget for consulting fees. New basic fee rates of 10 percent for new construction and 16 percent for renovations have been set for projects approved in 2002/03. Planning fees for new construction are further subject to adjustment, based on project size. For capital project budget estimating purposes, the scale for planning fees on new construction projects is provided in an addendum to the **2002/03 Five-Year Capital Plan Allowances, Rates and Costing Factors Supplement** (See Table 10 -Planning Fees Scale for New Construction Projects).

### Equipment

Equipment allowances for elementary, middle, and secondary schools are determined as a percentage of the base budget rate for construction. For capital project budget estimating purposes, equipment allowance percentages and freight rate allowances for equipment are provided in the **2002/03 Five-Year Capital Plan Allowances, Rates and Costing Factors Supplement**.

### **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 Five-Year 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.

- **Additional buses for new routes or trips:** documentation includes rationale for the request, and copies of route sheets and route maps
- **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 (either eligible or ineligible for operating funding under Function 7 - Transportation and Housing).

#### 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 Five-Year 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., “3” for the 2002/2003 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 - Five-Year Capital Plan Submission

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 Five-Year 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"> <li>• <b>Additions:</b> <ul style="list-style-type: none"> <li>♦ line drawings of existing facility</li> <li>♦ design aid sheet</li> <li>♦ CP-4 School Capacity and Enrolment Worksheet</li> </ul> </li> <li>• <b>New Space:</b> <ul style="list-style-type: none"> <li>♦ design aid sheet</li> <li>♦ CP-4 School Capacity and Enrolment Worksheet</li> </ul> </li> </ul>
Major Upgrade or Renovation	<ul style="list-style-type: none"> <li>• line drawings of existing facility</li> <li>• design aid sheet</li> <li>• CP-4 School Capacity and Enrolment Worksheet</li> <li>• building condition assessment rating, using revised Facility Audit Process</li> </ul>
Minor Upgrade or Renovation	<ul style="list-style-type: none"> <li>• independent consultant's report to determine scope of work and estimated cost</li> <li>• line drawings of existing facility</li> <li>• design aid sheet</li> <li>• CP-4 School Capacity and Enrolment Worksheet</li> <li>• rationale relating facility needs to educational programs</li> <li>• building condition assessment rating, using revised Facility Audit Process</li> </ul>
Site Acquisition	<ul style="list-style-type: none"> <li>• CP-4 School Capacity and Enrolment Worksheet</li> </ul>
Mechanical Upgrade or Electrical Upgrade	<ul style="list-style-type: none"> <li>• independent consultant's report to determine scope of work and estimated cost</li> <li>• building condition assessment rating, using revised Facility Audit Process</li> </ul>
Roofing	<ul style="list-style-type: none"> <li>• independent roofing consultant's report</li> <li>• information on previous Annual Capital Allowance allocations and expenditures</li> </ul>
Health and Safety	<ul style="list-style-type: none"> <li>• report from a building inspector, local health inspector, Workers' Compensation Board inspector, architect, or engineer</li> </ul>
Bus Acquisitions	<ul style="list-style-type: none"> <li>• <b>New:</b> rationale for request; copies of route sheets and route maps</li> <li>• <b>Replacement:</b> inspection report verifying age, condition and kilometers                             <ul style="list-style-type: none"> <li>♦ if replacement earlier than Ministry guidelines, include rationale and maintenance costs record</li> <li>♦ where capacity is being upgraded, include rationale, and copies of route sheets and route maps</li> </ul> </li> </ul>
Loss Prevention	<ul style="list-style-type: none"> <li>• recent loss prevention inspection report</li> </ul>
Asbestos Abatement	<ul style="list-style-type: none"> <li>• most recent WCB report</li> <li>• independent consultant's report to determine scope of work and estimated cost</li> <li>• list of priority-ranked projects based on Facility Audit results</li> </ul>

### **PART III: COST REDUCTION AND COST EFFICIENCY INITIATIVES**

A number of cost reduction and cost efficiency initiatives were first introduced in the Ministry's 1992/93 Capital Plan. In response to public concern related to Government debt, the Ministry in 1995/96 introduced other initiatives. In June 1996, Government announced a six-month Capital Review on all capital expenditures. This review identified a number of cost saving initiatives that school districts are expected to implement, in order to be considered for receipt of Government capital funding. In 1999, Cabinet approved the establishment of the Green Buildings BC - Retrofit Program.

These initiatives are intended to reduce the funding requirements for new capital projects to allow the maximum number of projects to be supported in the Ministry's Long-Term Capital Plans and to provide better management of the public education system's capital asset base.

#### **1. Efficiency Scheduling**

Efficiency scheduling includes year-round schools, shifts, extended day, and extended week schedules. Extending the hours of operation in a day or the number of days operating during the week and calendar year, schools can effectively reduce, or even eliminate, the cost of acquiring portable classrooms or building new facilities.

School boards are encouraged to incorporate efficiency scheduling as part of any request for Government funding to build new secondary space (new schools or additions to existing schools) or to replace existing secondary space. Capital projects that incorporate efficiency scheduling will receive higher priority consideration for inclusion in the Ministry's Long-Term Capital Plan.

In relation to new or replacement schools, projects incorporating efficiency scheduling will enable the construction of smaller, more cost-effective schools. As a result, these projects will receive higher priority consideration for inclusion in the Ministry's Long-Term Capital Plan. As well, school districts will receive increased space recognition under the Funding Allocation System, which will provide additional operating and maintenance funding for participating schools.

#### **2. Stock Plans for Elementary Schools**

School boards are encouraged to use Ministry of Finance and Corporate Relations stock plans for new school projects, and to re-use plans for existing elementary schools as developed by school districts and the Ministry of Finance and Corporate Relations. This approach not only results in savings in capital costs, but also may accelerate the design and construction cycle for school projects.

School districts are also encouraged to consider the construction of modular buildings for small elementary and secondary schools. In some circumstances, such as where a small school is required in the remote area of the province, school districts should consider construction of a modular building to provide the necessary educational services in the community.

Capital projects incorporating the use of stock plans or prototypical modular buildings will receive higher priority consideration for inclusion in the Ministry's Long-Term Capital Plan. (For more information on stock plans and modular building design, please contact your Educational Project Manager, Capital Division.)

### 3. School Size

Ministry of Education area standards for elementary, junior and middle, and secondary schools, as well as district service facilities, have been provided to school districts with the 2000/01 Five-Year Capital Plan Instructions.

(Please refer to the **Ministry of Education Area Standards**, available on the Ministry of Education Capital Planning Resources webpage.)

Small schools are costly on a unit cost basis and economies of scale are achieved in construction as schools are increased in size. As well, small schools are often inefficient to operate and limited in their educational program offerings. School districts are strongly encouraged to establish minimum capacity requirements for the construction of schools (e.g., 300 for elementary, 500-1000 for secondary schools).

Where the school district is unable to transport children by school bus to the nearest school in order to provide the necessary educational services, other alternatives that should be considered, including the construction of modular buildings, the use of distance education, or other cost-effective alternatives. These factors will be considered in establishing the provincial-level priority of the capital project.

### 4. Shared Acquisition and Development of School Sites

School boards are strongly encouraged to acquire and develop, where feasible, shared sites for elementary, middle or secondary schools. Shared school sites will considerably reduce site acquisition and development costs, as well as increase the utilization of existing and future land assets.

### 5. School Site Acquisition Legislation

In 1995, Government enacted the *School Sites Acquisition Statutes Amendment Act* which provided the authority to local municipalities and school boards to take up to 10 percent of land being developed or a cash-in-lieu equivalent from land owners at the time of subdivision. These amendments were intended to supplement the existing provisions in the *Municipal Act* for local governments to acquire land or cash-in-lieu for parks.

The *Education Statutes Amendment Act*, 1998 repealed the enabling land reservation legislation and enacted mandatory school site acquisition charge legislation. This legislation now requires local governments to collect a school site acquisition charge from developers on behalf of school boards, where new residential development creates a demand for new and expanded school sites in a school district. (For further information, see the **Implementation Guidelines: School Site Acquisition Charge**, available on the Ministry of Education Capital Planning Resources webpage.)

### 6. Securing Crown Land Grants for School Sites

The Ministry of Education and the Ministry of Environment, Lands and Parks have a protocol agreement that provides for the reservation and granting of school sites at a reduced cost to school boards.

## **7. Jointly Developing Sites and Facilities with Other Agencies**

School boards are also strongly encouraged to develop facilities jointly with other public agencies. Joint development reduces costly duplication of tax-supported facilities and results in overall increased facility utilization without sacrificing program delivery.

## **8. Public-Private Partnerships**

Public-private partnerships (P3) involve the private sector in the design, construction, financing and/or operation of a school. In certain situations, a P3 may result in considerable reduction in capital costs. Examples include a developer built-and-financed school in a new subdivision area, or a joint venture between a school district and developer to undertake a comprehensive redevelopment of an existing school site.

School boards are encouraged to work closely with Ministry of Education and Ministry of Finance and Corporate Relations staff to develop business proposals on P3 projects for consideration in their Five-Year Capital Plan submission.

## **9. Disposition of Surplus Assets**

The Ministry requires school boards to dispose of any surplus assets where schools are no longer required as part of the long-term facility needs of the school district. Proceeds from such disposals (where provincial funding was used in whole or in part to acquire the asset) must be deposited to school board's Capital Reserve, whereupon these funds will be available to reduce the cost of high priority capital projects in the district.

Specifically, when school rebuilds or school replacements are to be constructed on alternative sites, the Ministry requires the school board to sell the existing site in a timely fashion, provided the site is not required for future educational purposes. The proceeds from the sale of the existing site will be used to offset the cost of the capital project.

## **10. Using Capital Reserves**

A school board may be required to use part of its Capital Reserve to offset the cost of approved capital projects. The use of these funds reduces the need for Government to incur additional long-term debt in support of needed school projects. Under the *School Act*, all expenditures of Capital Reserve funds require ministerial approval.

## **11. Off-Site Development Costs and Charges**

In September 1994, Government announced guidelines that limit the amount of funding provided to support costs for local government service charges and bylaw requirements related to off-site works. The Ministry of Finance and Corporate Relations will only fund costs for Development Cost Charges (i.e., sewage, drainage, water and highway facilities, and park land) applied to the school construction, and the provision of perimeter sidewalks and curbing, fire hydrants, and service extension required to reach new site. The Ministry of Finance and Corporate Relations will not normally fund other off-site charges or bylaw requirements unless they are shown to be directly related to the development of the school.

(For more information on the funding of development cost charges, off-site charges, or bylaw requirements, please contact your Educational Project Manager, Capital Division.)

## **12. Green Buildings BC – Retrofit Program**

The new Retrofit Program was established to help provincially-funded educational and health care institutions procure building retrofits that pay for themselves through reduced operating costs - specifically, retrofits that reduce energy and water consumption and greenhouse gas and waste generation. Detailed information about the Retrofit Program can be accessed by calling (250) 952-8800 or referring to the Program's website:

[www.greenbuildingsbc.com](http://www.greenbuildingsbc.com)



Ministry of Education

**2002/03**

**Five-Year Capital Plan**

**Instructions**

**Appendices**

Capital Planning Branch  
April 2001

## **2002/03 FIVE-YEAR CAPITAL PLAN INSTRUCTIONS: APPENDICES**

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## **Appendix A: CP-1 CAPITAL PROJECT REQUEST FORM**

This Appendix offers general guidance regarding the **CP-1 Capital Project Request Form**. The **CP-1 Form** is a central component in preparing a five-year capital plan and is one of the capital planning forms that must be completed using the Ministry's web-based capital planning system. Access to the CP-1 Form and other capital planning forms is limited to designated school district users only. Instructions on the completion of these forms are provided on the Ministry's web-based capital planning webpage.

As part of the implementation of the web-based capital planning system, school districts have completed a CP-1 Form for each of the capital projects included in Year One to Year Five of last year's Five-Year Capital Plan submission. All information related to those capital projects not supported for funding in 2001/02 can be brought forward to 2002/03 and updated. Only new projects will require the completion of a new CP-1 Form.

The completed CP-1 Forms are the basis for the development of the annual capital programs for school districts and the Ministry's Long-Term Capital Plan, which informs the development of the Consolidated Capital Plan for Government.

Please note the following significant aspects of the CP-1 Capital Project Request Form:

1. School board project ranking categories (i.e., high, medium or low) are provided on the **CP-1 Form**. Planning Officers will work with school districts to ensure that project evaluation criteria and methodologies are consistent with those of the Ministry, in order to produce a closely correlated rank order. The Ministry will then apply a standard technical criteria to evaluate and rank all requests from across the province. The Ministry will 'echo' this ranking back to the school district, which reflects the status of their requested projects in this provincial context. Finally, a list of capital projects will be submitted to the Minister for consideration. Those supported capital projects will then be amalgamated with other social capital ministry requests into Government's Consolidated Capital Plan.
2. Project codes are used by the Ministry to sort capital project requests into various categories for evaluation and prioritization. A list of the project codes is provided as part of this Appendix.

Addition projects that include significant renovations may be supported by the Ministry. However, for the purposes of capital planning, a separate **CP-1 Form** must be completed for each of these two construction activities (i.e., one ADD and one RENO), as different evaluative criteria are applied to each of these project types. District staff should work with their Planning Officer to determine the feasibility and benefits of combining two projects. Where it is deemed appropriate, a dual project may be recognized in the Five-Year Capital Plan.

The project codes are assembled into two distinguishing categories - *space* and *non-space*. Space projects include those projects that result in either an increase in area and/or capacity, or the reconfiguration of internal spaces which results in changes in use. Space projects which directly result in a net change in the capacity or grade configuration of a facility are considered a capacity project (i.e., ADD, NEW, REPLACE, or ALTER). This can include projects that don't necessarily add extra area, but still result in a change in capacity. Space projects which do not result in a change in the capacity or grade configuration of a facility are considered a non-capacity project (i.e., REBUILD or EXPAND), even though they may result in increased area. Therefore, 'rebuilt schools', which replace existing schools but do not increase facility capacity, are not considered capacity projects.

A distinction is made between 'school replacement' and 'school rebuild' projects through the use of the project codes REPLACE and REBUILD. A school replacement is categorized as a capacity project because it refers to a newly-constructed school with greater capacity than the original, and it will be evaluated as a space request, as well as a replacement request. A school rebuild is a non-capacity project, as another school of equal or smaller capacity is constructed in place of an existing school.

A similar distinction is made between an 'alteration' and an 'expansion' project. The project code ALTER is under the capacity category as it refers to a remodeling of an existing school that will result in a change in capacity or a change in grade configuration (e.g., conversion to a middle school), but may or may not increase the area of the school. The project code EXPAND is classified as a space project because it increases the area of a school, but it is non-capacity because the additional space does not affect the capacity (e.g., expansion of non-instructional space, such as a gymnasium or administration area).

The counterpart of alterations under the non-space category is a 'renovation'. The project code RENO is used to classify a remodeling project that does not result in any increased space or capacity at an existing school.

3. Unlike the prescribed project codes, there is an expanded field where project descriptions are to be entered. The description should identify such things as the change in capacity, the type of additional spaces, the location (only where this may be ambiguous), the type of upgrade, etc. This will enable the project to be described in greater detail and precision. Some typical phrases are provided on the webpage. However, the description is not limited to these phrases, which serve only as a guide.
4. For the existing capacity of the school, the capacity will appear, as recorded on the **CP-3 School District Summary of Capacity and Projected Enrolments Form**.
5. A CP-1 Form must be completed for all capital projects in Years One - Five of the 2002/03 Five-Year Capital Plan submission.
6. The source of funding included for site acquisition projects may include 'Land Capital Reserve Trust Fund', as provided under the *School Site Acquisition Statutes Amendment Act, 1995*, and *Education Statutes Amendment Act, 1998*.

## CAPITAL PLANNING PROJECT CODES

### SPACE PROJECTS

#### **CAPACITY-RELATED SCHOOL PROJECTS:**

ADD	Addition [increases the area of an existing school with a resulting increase in capacity; includes planning and completion phases]
ALTER	School Alteration [upgrades an existing school with a resulting change in capacity; includes planning and completion phases]
NEW	New School [includes site acquisition, planning and completion phases]
REPLACE	Replacement School [supercedes an existing school with a resulting change in capacity; may include site acquisition phase; includes planning and completion phases]

#### **NON-CAPACITY-RELATED SCHOOL PROJECTS:**

EXPAND	School Expansion [increases the area of an existing school with no increase in capacity; includes planning and completion phases]
REBUILD	School Rebuild [supercedes an existing school with no change in capacity; may include site acquisition phase; includes planning and completion phases]

### NON-SPACE PROJECTS

#### **FACILITIES-RELATED PROJECTS:**

ACCESS	Accessibility [provides access to facilities for persons with physical disabilities]
ASBEST	Asbestos Abatement
ELECUP	Electrical System Upgrade
ENERGY	Energy Management [includes energy retrofits; energy saving performance contracts]
HEALTH	Health and Safety Upgrade
LOSSPV	Loss Prevention [fire sprinklers; fire alarm; intruder alarm systems]
LOSSREP	Loss Replacement [reimbursement for Ministry-insured property damage] ( <i>at Ministry's request only</i> )
MECHUP	Mechanical System Upgrade [heating; ventilation; air conditioning]
RENO	Renovation [upgrades an existing facility with no change in capacity; includes planning and completion phases]
ROOFREP	Roof Replacement [ <i>emergent project only</i> ]
SITEEXP	Site Expansion [increases site size of an existing school]
SITEIMPR	Site Improvement [upgrade to an existing school site]
SITESERV	Sewer, storm and water works and services [for existing schools]
SPN	Seismic Project Non-Structural [non-structural seismic mitigation, as approved under the Provincial Seismic Mitigation Program, Ministry of Finance & Corporate Relations]
SPS	Seismic Project Structural [structural seismic mitigation, as approved under the Provincial Seismic Mitigation Program, Ministry of Finance & Corporate Relations]

#### **OTHER PROJECTS**

BUSNEW	New School Bus
BUSREP	Replacement School Bus
DISPOSE	Disposal [disposal of land; disposal of improvements]
FEASTUDY	Feasibility Study [review of renovation/replacement options] [ <i>Assigned by Ministry only</i> ]
PORTCL	Portable Classroom [purchase and installation of eligible portable classroom] [ <i>Emergent Project only</i> ]
SITEAN	Site Analysis [evaluation of potential school sites] [ <i>Assigned by Ministry only</i> ]

## **Appendix B: CP-2 FIVE-YEAR CAPITAL PLAN SUMMARY**

The primary intent of the **CP-2 Five-Year Capital Plan Summary** is to communicate to the Ministry how a school board wishes to schedule capital projects proposed for its capital program (Year One) and Years Two - Five of its Five-Year Capital Plan. School boards should provide all desired construction projects, including site acquisitions, that are proposed for a 10-year planning timeframe. Projects proposed for the sixth through tenth years of this planning timeframe are collapsed into Year Five of the Five-Year Capital Plan.

It is critical that the Ministry be provided with an overview of the needs and proposed capital activities within each school district to allow determination of which capital projects can be supported each year in the Ministry's Long-Term Capital Plan. The listing of how the school board views the relative priority of its projects is instrumental in assisting the Ministry in assessing its support for those projects. Therefore, the **CP-2 Five-Year Capital Plan Summary** must be an accurate reflection of capital planning priorities for a school district.

The **CP-2 Summary** allows projects to be organized, as follows:

### **1. Group Projects by Year**

Projects are to be listed segregated by year, with each year's projects then put in rank order. The Five-Year Capital Plan reflects an orderly sequence of capital works, and is an indication of funding needs by year. The amount indicated for each project is only an estimate for capital planning purposes, and is not an indicator of Ministry of Finance and Corporate Relations-approved capital budgets nor cash flow targets.

**Note:** Financial estimates are in current dollars and not inflated for future years.

Under the planning approval process of the Capital Division, Ministry of Finance and Corporate Relations, a major project consists of two separate project phases that may require financial information in more than one different capital years:

- site (where site acquisition is required); and
- planning/completion, which should be entered in a single capital year.

Minor projects have one phase (i.e., completion) and financial information is required in one capital year only.

### **2. Project Priority**

For each capital program project (Year One), assign a numerical ranking, ordered from highest to lowest. Indicate the priority from "1 to n" sequentially, starting with 1 as the school board's highest priority. The same priority number may not be assigned to more than one project.

## **Appendix C: CP-3 SCHOOL CAPACITY SUMMARY OF CAPACITY AND PROJECTED ENROLMENT FORM**

Each school district should review the enrolment data provided in the **CP-3 School Capacity Summary of Capacity and Projected Enrolment Form**. The facility statistics, such as nominal capacity, reflects data from the Ministry's facility inventory. The historical enrolment reflects the approved student headcount enrolment with the following exclusions:

- Continuing Education
- Correspondence
- Home School Registrations
- Students Younger than School Age
- Students Older than School Age
- Offshore Students

The Ministry projection of school district enrolment is shown as district totals for Kindergarten, elementary and secondary. Using the Ministry enrolment projections as a base, enrolment breakdowns by grade-type and school must be provided on the CP-3- School District Summary of Capacities and Projected Enrolment Form. If Ministry figures differ from enrolment projections assembled by the school district, this information should be provided to the Ministry along with supporting documentation. Such differences will receive individual review and an appropriate adjustment may be made to the Ministry enrolment projections.

School districts now have the option of submitting all projected school-based enrolments in a prescribed spreadsheet format, which in turn will be uploaded by the Ministry into its web-based system for use by school district users.

**Note:** To arrive at the total Kindergarten student enrolment for individual schools providing full-day Kindergarten classes, the full-day Kindergarten student enrolment must first be multiplied by two (to arrive at an equivalent half-day Kindergarten enrolment), with the resulting number added to any other half-day Kindergarten student enrolment.

## **Appendix D: CP-4 SCHOOL CAPACITY AND ENROLMENT WORKSHEET**

Priority of capital funding requests for the construction of new space is determined by the overall need in a particular area within a school district. The **CP-4 School Capacity and Enrolment Worksheet** calculates the level of need, based on the operating capacities, current enrolments and projected enrolments of all schools in an area. This analysis applies to funding requests for new schools, additions to existing school, school alterations, and school replacements.

**Note:** When calculating the need in an area, the new space associated with any currently approved project or a higher priority project in the same capital plan year is considered as existing, even if a project is not yet complete or has not yet been approved, respectively.

Completion of the **CP-4 Worksheet** consists of identifying all neighbouring school that may be affected by a project. Neighbouring schools include all schools in the area that may be considered part of a single large catchment area and whose enrolments are likely be affected by the requested project. In urban areas, this catchment area is usually a three-kilometer radius for elementary schools and a five-kilometer radius for secondary schools. In rural areas, where busing is common, this radial distance may be increased.

Geographic factors, such as rivers, ravines, or major arterial roads, may reduce the catchment area in some instance.

## Appendix E: SCHOOL BOARD CAPITAL PLAN RESOLUTION SAMPLE

For the Ministry to process a Five-Year Capital Plan submission, a copy of the Board of School Trustees' Resolution that adopts the Five-Year Capital Plan must be included as part of the hard copy supporting documentation submitted to the Ministry. A sample resolution is provided below.

*(District Letterhead)*

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*(Date)*

That the Board of School Trustees approve the Five-Year Capital Plan as outlined on the attached summary.

I hereby certify this to be a true copy of the resolution for approval of the Five-Year Capital Plan adopted by the Board of School Trustees, the \_\_\_\_\_ day of \_\_\_\_\_, 2001.

*(Signature)*

\_\_\_\_\_  
Secretary Treasurer

**Appendix F: SCHOOL BUS TENDER SPECIFICATIONS DOCUMENT**

**Each vehicle must meet all standards of current Federal and Provincial Regulations, and CSA D250-00 requirements.  
 Components not listed are expected to meet the CSA D250-00 standards, as a minimum.**

ITEM	YES/NO	COMMENTS
<b>AIR BRAKES:</b> To meet CSA D250-00 standards, plus air dryer; front - 16½ x 5; rear - 16½ x 7; manual drain value on each tank		
<b>ALTERNATOR:</b> Minimum 160 amps, 12 volts		
<b>AXLES:</b> Front - state make and capacity Rear - state make and capacity		
<b>BATTERY:</b> As per engine requirements Enclosed compartment, complete with sliding tray		
<b>CHASSIS:</b>  Make: _____ Model: _____  Year: _____ Wheelbase: _____		
<b>DEFROSTERS:</b> Separate defroster blowers for each windshield 2 center-mounted defroster fans, 2-speed, separate switches		
<b>DOME LIGHTS:</b> Separate switches for driver, front half and rear half of bus		
<b>EMERGENCY EXITS (excluding roof hatches):</b> To meet CSA D250-00 standards		
<b>ENGINE:</b> Diesel - 84 pass. approx. 250 hp, 8.3 liter - 72 pass. approx. 225 hp Warning system for low oil pressure and high temperature		
<b>ENTRANCE DOOR:</b> To meet CSA D250-00 standards Air-operated (when equipped with air brakes), outward opening Vandalock systems for all doors		
<b>EXTERIOR LIGHTS:</b> To meet CSA D250-00 standards		
<b>EXTERIOR MIRRORS:</b> To meet CSA D250-00 standards		

ITEM	YES/NO	COMMENTS
<b>FLOOR:</b> To meet CSA D250-00 standards		
<b>HEATERS:</b> Approximately 90,000 BTU, defroster capable of clearing all front windows Approximately 80,000 BTU for rear underseat		
<b>INSTRUMENTS AND INSTRUMENT PANEL:</b> To meet CSA D250-00 standards, plus transmission temperature gauge, tachometer, engine hour meter		
<b>INSULATION:</b> To meet CSA D250-00 standards		
<b>INTERIOR REARVIEW MIRROR &amp; SUN SHIELD:</b> To meet CSA D250-00 standards		
<b>LUGGAGE COMPARTMENT (Exterior):</b> Right hand side (passenger) to accommodate vehicle equipment (e.g., chains, tires) and provide some storage (e.g., band instruments)		
<b>NOISE ABATEMENT PACKAGE:</b> Engine area and driver's area Acoustic headliners in first two and last two roof sections		
<b>PAINT:</b> To meet CSA D250-00 standards, including: External bus number and belt lettering - "SCHOOL DISTRICT NO. __ (_____)" Internal signs, over windshield - "No Smoking - No Standees" Body fully undercoated for noise and rust		
<b>POWER STEERING:</b> 72 & 84 passenger - full power steering - tilt telescopic steering column		
<b>RADIATOR:</b> Heavy duty cooling system		
<b>RETROREFLECTIVE MARKING:</b> To meet CSA D250-00 standards		
<b>ROOF EMERGENCY ESCAPE HATCH:</b> 72 & 84 passenger - 2 emergency roof hatches (spaced equidistant from ends) under 72 passenger - 1 emergency roof hatch (centered over length of bus)		
<b>RUB RAILS:</b> To meet CSA D250-00 standards		
<b>SAFETY EQUIPMENT:</b> To meet CSA D250-00 standards		

ITEM	YES/NO	COMMENTS
<p><b>SEATING:</b>                      To meet CSA D250-00 standards                      Deluxe driver's seat fully adjustable, high back, air suspension when bus equipped with air brakes, tilt back, lap and shoulder belt, vinyl with cloth insert</p>		
<p><b>SHOCK ABSORBERS:</b>                      To meet CSA D250-00 standards</p>		
<p><b>SPLIT SASH SIDE WINDOWS:</b>                      To meet CSA D250-00 standards</p>		
<p><b>SPRINGS:</b>                      To meet CSA D250-00 standards</p>		
<p><b>STOP ARM:</b>                      Air operated when bus equipped with air brakes, red flashing lights on blade, control in conjunction with front door opening, wind guard</p>		
<p><b>TIRES:</b>                      84 passenger - 11R22.5 tubeless radial                      54-72 passenger - 10R22.5 tubeless radial                      36-48 passenger - 9R22.5 tubeless radial</p>		
<p><b>TRANSMISSION</b>                      84 passenger                      - Allison MD3060 5-speed electronic control                      - automatic with external filter and temperature gauge                      - exhaust brake programmed with transmission to automatically downshift to 4th gear on deceleration                      36-72 passenger                      - standard transmission</p>		
<p><b>WARNING LIGHTS</b>                      8 light warning system, non-sequential, with master switch, visors</p>		
<p><b>WHEELS</b>                      84 passenger - 8.25 x 22.5 heavy duty 10-stud disc                      60-72 passenger - 7.25 x 22.5 cast spoke                      36-54 passenger - 10-stud cast spoke</p>		
<p><b>WINDSHIELD:</b>                      4-piece, flat tinted                      Hand holds for windshield cleaning on exterior</p>		
<p><b>WIPERS:</b>                      Dual electric, mounted <b>below</b> windshield                      Windshield washers with wet arm intermittent wipers</p>		