

## **FIVE-YEAR CAPITAL PLAN INSTRUCTIONS: APPENDICES**

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**Note:** Refer to “Brief Instructions” on further use of the Web-based Capital Planning System (WebCAPS) electronic forms

## 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 the key component in a school board's preparation of their five-year capital plan. The **CP-1 Forms** completed by school boards are the basis for the development of the **Ministry's Three Year Capital Plan**. The **CP-1 Form** is one of various 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 web page: <http://educweb.educ.gov.bc.ca/ecp/prd/welcome.htm>.

As part of the web-based capital planning system, school districts must complete a **CP-1 Form** for each capital project requested in Year One to Year Five of their Five-Year Capital Plan submission. All information related to those projects not supported for funding in a previous year can be brought forward to the current year and updated. Only new projects will require the completion of a new CP-1 Form.

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 standard technical criteria to evaluate and rank all requests from across the province. The Ministry will 'echo' its ranking back to each school district.
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 on Page A-3 of this Appendix.

**Note:** Project codes associated with most minor non-space projects are no longer accommodated within the **CP-1 Form** as these projects are to be funded from the district's Annual Facility Grant.

The project codes are assembled into two distinguishing categories - capacity or non-capacity and are ranked based on completely different sets of criteria. Capacity projects include those projects that result in an increase in capacity, change in grade structure (e.g. elementary school to middle) through the construction of new space, or the reconfiguration of internal spaces which results in changes in use. These projects are ranked based on capacity/enrolment and capacity utilization. Projects that do not result in an increase in the capacity or change in grade configuration of a facility are considered non-capacity projects, even though they may result in increased area. These projects are ranked based on facility condition (i.e. facility audit score or seismic ranking).

Addition projects that include significant renovations or replacement projects that include an increase in capacity 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/REPLACEMENT), as different evaluative criteria are applied to each of these project types. Should such a project be supported in a three-year capital plan, the mandatory feasibility study will confirm the scope of the project including capacity as well as extent of renovations and/or replacement. A determination may also be made as to the feasibility and benefits of combining an upgrade with an increase in capacity.

**Note:** The project codes EXPAND and REBUILD are no longer available, replaced by ADDITION and REPLACE, respectively.

3. Unlike the prescribed project codes, there is an expanded field where project descriptions must be entered by school districts. The description should identify project specifics such as the change in capacity; type of additional spaces; location (only where this may be ambiguous), etc. Some phrases are provided in Page A-4 of this Appendix. Although the description is not limited to these phrases it is expected that they will be used wherever possible.
4. For the existing capacity of a school, the capacity will appear as recorded on the **CP-3 School District Summary of Capacity and Projected Enrolments Form**.
5. Financial estimates must be provided in current dollars and not inflated for future years. If approved to proceed, the feasibility study will confirm the budget for the year of approval.
6. The source of funding included for site acquisition projects may include those cited in section 101(3) of the *School Act*, with respect to the collection of school site acquisition charges in a school district.
7. The source of funding for other capital projects may include “local capital”, “restricted capital” (previously Capital Reserve), or community funds.

## CAPITAL PLANNING PROJECT CODES

### 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 changes the grade configuration of a school e.g. elementary school to middle; includes planning and completion phases]
- NEW New School [includes site acquisition, planning and completion phases]

### NON-CAPACITY RELATED SCHOOL PROJECTS

- REPLACE Replacement School [Replaces an existing school or a specific portion of an existing school (e.g. 1953 Wing) with a new facility; may include site acquisition phase; includes planning and completion phases.]
- RENO Renovation [upgrades an existing facility with no change in capacity; includes planning and completion phases]
- SITEEXP Site Expansion [increases site size of an existing school]
- SPN Seismic Project Non-Structural [non-structural seismic mitigation, includes planning and completion phases]
- SPS Seismic Project Structural [structural seismic mitigation, includes planning and completion phases]

### **OTHER PROJECTS**

- BUSNEW New School Bus
- BUSREP Replacement School Bus

## **CAPITAL PLANNING PROJECT DESCRIPTIONS**

<b><u>Project Code</u></b>	<b><u>Project Title</u></b>	<b><u>Project Description</u></b>
NEW	Name of School	New 40K/300 capacity elementary
ADD	Name of School	Increase capacity from 40K/200 to 40K/300
ALTER	Name of School	Convert 40K/300 capacity elementary to 450 capacity junior middle school
REPLACE	Name of School	Replace existing 40K/350 capacity elementary with new 40K/300 capacity elementary  Replace 1953 classroom block
RENO	Name of School	Renovations required to upgrade facility
SITEEXP	Name of School	Expand site to accommodate school addition
SPS	Name of School	Upgrade resistance to seismic loading
SPN	Name of School	Non structural seismic upgrading
BUSNEW		One new 72 passenger bus
BUSREP		Replace bus #'s 1234 & 1235 (1 – 84, 1 - 72 PASS)

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

The 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 Five-Year Capital Plan. School boards should provide all desired construction projects that are proposed for a five-year planning timeframe, including site acquisitions. Site acquisitions proposed for the sixth through tenth years of this planning timeframe are collapsed into Year Five of the Five-Year Capital Plan Summary.

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 in each year of the Ministry's Three Year Capital Plan. The listing of how the school board views the relative priority of its projects is instrumental in assisting the Ministry to assess its support for those projects. Therefore, the **CP-2 Five-Year Capital Plan Summary** must be an accurate reflection of capital planning priorities for its 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. The actual cost will be determined during the feasibility study process prior to signing the Project Agreement by the School Board and Minister of Education.

Under the capital project approval process, a project requiring purchase of a site must be entered as two separate project phases normally requiring financial information in two different capital years. The two phases are:

- site acquisition; and
- planning/completion.

**Note:** Previously separate phases, planning and completion have been collapsed into one phase and must only be entered in a single capital year.

### 2. Project Priority

Each capital project must be assigned a numerical ranking, ordered from highest to lowest priority. 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.

**Note:** It is expected that the priority of projects will follow the year of request; however, bus requests entered in the first two years of a district's capital plan may be classified as lower priority than a year three capital 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**. School Districts must ensure that the sum of the individual schools agrees with the Ministry projections.

If a school district chooses to develop its own ten-year projections based on local knowledge of future development and enrolment trends, these projections may only be entered into its **CP3 form** following written agreement from a Planning Officer.

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 geographic 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 an approved project is not yet complete or the higher priority project(s) has not been approved.

Completion of the **CP-4 Worksheet** consists of identifying all neighbouring schools 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 to 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 should be increased.

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



## **Appendix E: CP-5 CAPACITY UTILIZATION ANALYSIS**

The Ministry determines funding support eligibility for requested projects by applying capacity utilization thresholds for elementary and secondary space. Capacity utilization is considered for all requests for new schools, additions to existing schools, rejuvenation of existing schools, and replacement of existing schools.

The **CP-5 Capacity Utilization Forms** calculate the percentage utilization of space for a school district based on the existing operating capacities, and current or projected enrolments. This encompasses only “standard schools” (i.e., exclusive of alternate programs, continuing education, distance education programs, etc.)

There are two versions of the **CP-5 Forms** used by the Ministry to determine funding support eligibility:

- **CP-5A Capacity Utilization Summary** provides the percentage utilization rates at the school district level for up to six selected years.
- **CP-5B Capacity Utilization Analysis** provides a listing of all active and proposed schools, and the percentage utilization at both the school and school district level for a selected school year.

**Note:** When selecting the capital plan year, enrolment projections for each school must have been previously entered in the **CP-3 School District Summary of Capacity and Projected Enrolments** by the school district for that year.

**Appendix F: 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 \_\_\_\_\_, 200x.

*(Signature)*

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Secretary Treasurer

## Appendix G: 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
<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		
<b>SHOCK ABSORBERS:</b> To meet CSA D250-00 standards		
<b>SPLIT SASH SIDE WINDOWS:</b> To meet CSA D250-00 standards		
<b>SPRINGS:</b> To meet CSA D250-00 standards		
<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		
<b>TIRES:</b> 84 passenger - 11R22.5 tubeless radial 54-72 passenger - 10R22.5 tubeless radial 36-48 passenger - 9R22.5 tubeless radial		
<b>TRANSMISSION</b> 84 passenger <ul style="list-style-type: none"> <li>- Allison MD3060 5-speed electronic control</li> <li>- automatic with external filter and temperature gauge</li> <li>- exhaust brake programmed with transmission to automatically downshift to 4th gear on deceleration</li> </ul> 36-72 passenger <ul style="list-style-type: none"> <li>- standard transmission</li> </ul>		
<b>WARNING LIGHTS</b> 8 light warning system, non-sequential, with master switch, visors		
<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		
<b>WINDSHIELD:</b> 4-piece, flat tinted Hand holds for windshield cleaning on exterior		
<b>WIPERS:</b> Dual electric, mounted <b>below</b> windshield Windshield washers with wet arm intermittent wipers		