



**Capital Plan Instructions:
Five-Year Capital Plan Submission
for
2021/22**

These Capital Plan Instructions Supersede All Previous Editions

Ministry of Education
Capital Management Branch
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PART I: CAPITAL PLANNING

1 Overview

The *School Act* provides that the Minister of Education may require a board of education to prepare and submit a capital plan for its school district to the Ministry. Under this authority, the Ministry has established that capital plans will be submitted annually for its review.

The capital plan must set out particulars for each capital project that a board proposes to undertake during a period specified by the Minister, with five years being established as the appropriate time period for Government capital planning purposes. A key requirement for the submitted capital plan is for an estimate of the capital funding that would be required for each proposed capital project.

The Ministry is further authorized to require a board to provide additional information that supports the overall capital plan and each of the proposed projects included therein.

The templated forms and documents that may be required by the Ministry to be submitted by a board as part of its Five-Year Capital Plan submission include, but may not be limited to:

- Capital Plan Intake Spreadsheet
- Five-Year Capital Plan Summary Spreadsheet
- School District Summary of Capacity and Projected Enrolment Form (CP-3)
- Project Request Fact Sheet (PRFS)/Seismic Project Request Fact Sheet (SPRFS)/Demolition Project Request Fact Sheet (DPRFS)
- Seismic Project Identification Report (SPIR)
- Surrounding Schools Analysis (New School Project and/or Existing School Project)
- Long-Range Facilities Plan (LRFP)

As part of a Five-Year Capital Plan submission, the Ministry will also require the submission of reports and documentation in support of projects requested under the various Major Capital Programs and Minor Capital Programs.

Each board of education is expected to have a Long-Range Facilities Plan (LRFP) in place for its school district that outlines management strategies for its inventory of capital assets in support of educational programming goals. The LRFP does not need to be submitted as part of a Five-Year Capital Plan, although the Ministry may request pertinent sections to inform its capital plan review process.

The *School Act* further states that before submitting a capital plan to the Ministry for approval, a board of education must approve the capital plan for its school district only by resolution. Ultimately, the Minister has the authority to either: approve; approve with modifications; or reject a capital plan, as submitted by the board to the Ministry.

These Capital Plan Instructions are published by the Ministry to ensure that individual capital plans submitted by boards of education meet the provisions of the *School Act*, which in turn allows the Ministry to generate its own multi-year capital plan at the provincial level.

The Ministry's capital plan is subject to annual capital funding approval by Treasury Board.

1.1 Five-Year Capital Plan Submissions

Annual Five-Year Capital Plan submissions from boards of education are used by the Ministry to determine which priority capital projects may be included in the Ministry's Capital Plan for the following fiscal year. The capital plan submissions also provide the Ministry with important insight into future year capital priorities, which can be used for longer term government planning and the determination of potential future capital funding requirements for the public education system.

1.2 Submission Deadline

Submission of a finalized Five-Year Capital Plan for the following capital year, along with supporting documentation, must be sent to the Ministry on or before **July 31st** of the current capital year. It is strongly encouraged that school districts discuss the draft versions of their submission with Ministry staff well in advance of the submission deadline.

1.3 Ministry Capital Programs

The Ministry is seeking capital project requests under the following capital programs:

Major Capital Programs:

- Seismic Mitigation Program (SMP)
- School Expansion Program (EXP)
- School Replacement Program (REP)
- Rural Districts Program (RDP)

Minor Capital Programs:

- School Enhancement Program (SEP)
- Carbon Neutral Capital Program (CNCP)
- Bus Acquisition Program (BUS)
- Playground Equipment Program (PEP)
- Building Envelope Program (BEP)

Note: The Annual Facility Grant (AFG) funding program is excluded from the annual Five-Year Capital Plan submissions, as it is a separate process.

1.4 Capital Project Approval Processes

Project requests will follow an approval process dependent on the capital program the project is associated with, as follows:

One-Stage Approval Process

All requests made for a Minor Capital Program project (SEP, CNCP, BUS, PEP, BEP) will

undergo a one-stage approval process. Ministry support for a qualifying project request will be based on the information provided by school districts under the appropriate tabs in the Capital Plan Intake Spreadsheet.

Figure 1-1 illustrates this process:

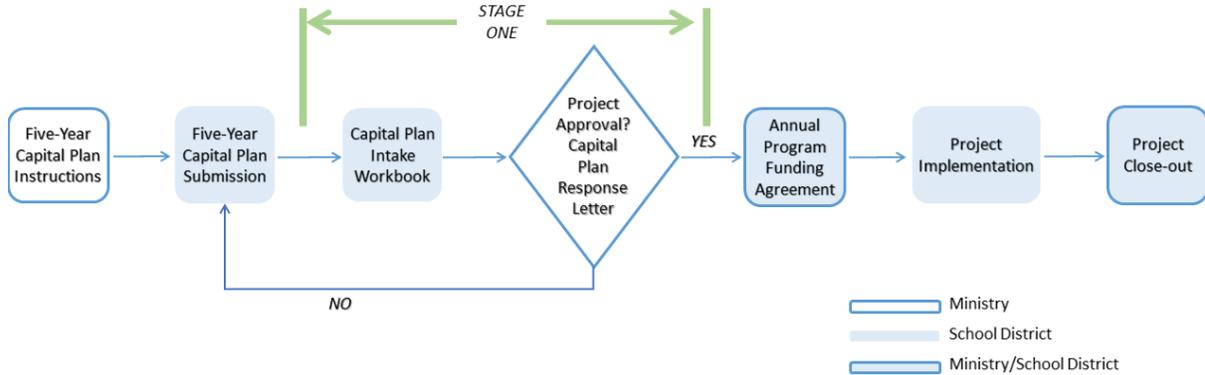
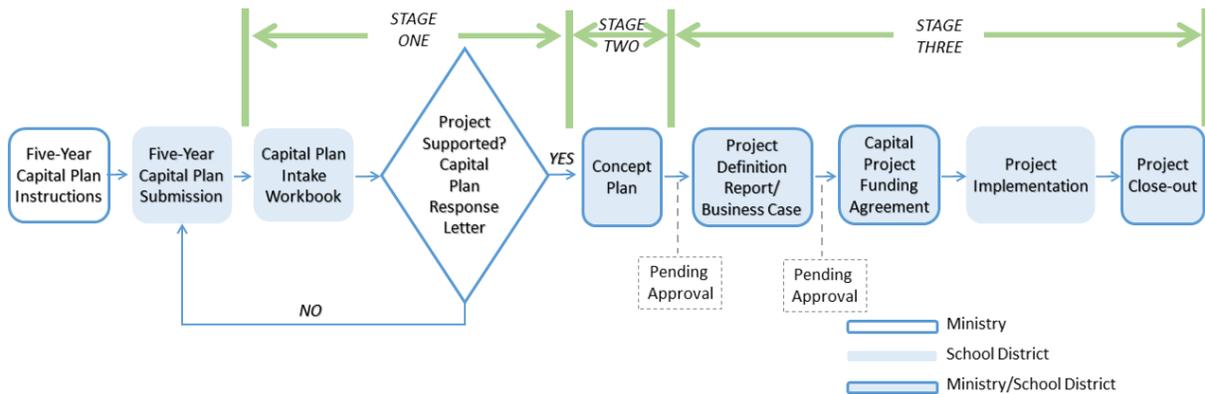


Figure 1-1 - One-Stage Capital Project Approval Process for SEP, CNCP, BUS, PEP, BEP

Three-Stage Approval Process

All requests for a Major Capital Program project (SMP, EXP, REP) will undergo a more extensive three-stage process. Initial Ministry support for a qualifying project request will be based on the preliminary information provided in a Project Request Fact Sheet for EXP and REP projects; a Seismic Project Request Fact Sheet for SMP projects; a Rural Demolition Project Request Fact Sheet for RDP projects.

Figure 1-2 illustrates this process:



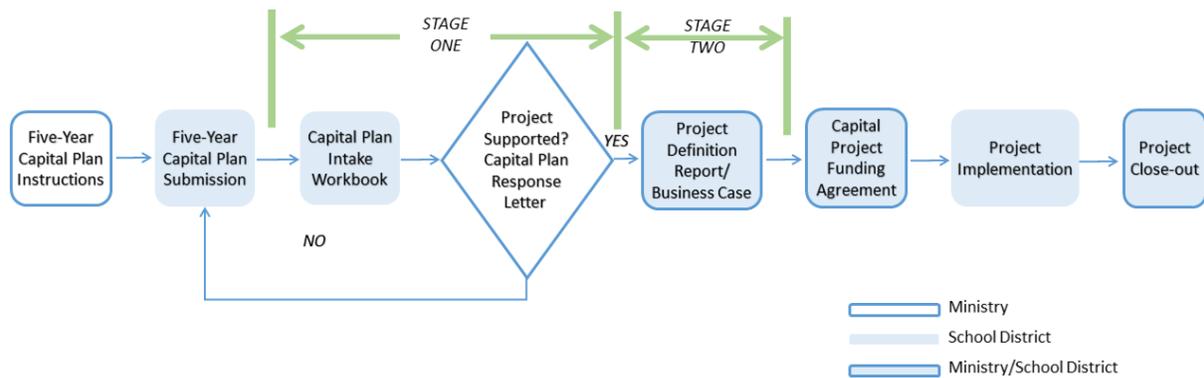


Figure 1-3 Two-Stage Capital Submission Process for RDP

Under all processes, a board of education is responsible for using its local funds to cover the initial costs for any planning work and reports required to determine a proposed scope and preliminary cost estimates for a requested capital project.

1.5 Long-Range Facilities Plan

A comprehensive Long-Range Facilities Plan (LRFP) should guide board of education decisions regarding capital asset management and capital plan submissions, both in terms of facility operations and educational programming. The content of each LRFP developed by boards is fully expected to vary, as they will be dependent on the unique circumstances of individual school districts currently and in the future.

The LRFP for a school district would most commonly use at least a ten-year planning horizon. However, a longer period may be considered where local government is actively pursuing extended land use planning and lengthier residential development growth strategies, which may directly influence the growth of student enrolment in different areas of the school district. Conversely, the potential contraction of communities and changing demographics in neighbourhoods, leading to subsequent decline in student enrolment, may also need to be considered under the LRFP.

Capital project requests should be supported by a current LRFP, as the Ministry may request school districts to provide appropriate sections of the LRFP to inform its review of requested projects. Any school for which a capital project is being proposed must be identified in the LRFP as being required for the board’s current and future provision of education programming for students in the school district.

(See Appendix C: Long-Range Facilities Plan Guidelines)

1.6 Board Resolution

In accordance with section 142 (4) of the *School Act*, a board of education must approve the proposed capital plan for its school district only by resolution. Each board of education

must then provide a copy of the resolution as a part of its annual Five-Year Capital Plan submission to the Ministry. Boards are not required to adopt a capital bylaw at this point in the annual Five-Year Capital Plan approval process. (See Appendix A: Board Resolution for Five-Year Capital Plan)

1.7 Capital Plan Response Letter

Once the assessment of capital plan submissions from all school districts has been completed by the Ministry, and the provincial Budget has been formally announced by the Province, the Ministry will notify each school district with a written response regarding its board's Five-Year Capital Plan submission.

The Capital Plan Response Letter will identify the specific capital projects from the Minor Capital Programs and Major Capital Programs that are being supported for capital funding under the Ministry's Capital Plan. The letter will also advise the school district of the next steps for each of the supported projects, which may include:

- Proceed to acquiring a site:
- Proceed to developing a Concept Plan for a SMP project; EXP project; or REP project
- Proceed to developing a business case for an RDP project
- Proceed to the design, tender and construction for a SEP project or CNCP project
- Proceed to acquiring a bus(es) for a BUS project
- Proceed to the purchase and installation of playground equipment for a PEP project
- Work with BC Housing, when contacted, on developing a BEP project

As only a portion of all proposed projects submitted in the annual Five-Year Capital Plan may be supported for capital funding under the Ministry's Capital Plan, ministerial approval will not be granted for a board's capital plan in its entirety. For the purposes of section 142 (5) of the *School Act*, a capital plan with modification will instead be approved, which will only include those capital projects that have been identified in the Capital Plan Response Letter.

While the Ministry also provides school districts with an AFG, the allocation of this funding remains a combination of both capital funds and operating funds. School districts must therefore notify the Ministry of planned AFG projects separately from the annual Five-Year Capital Plan submission process.

1.8 Capital Plan Bylaw

Upon receipt of the Capital Plan Response Letter from the Ministry, the board of education must adopt a single capital bylaw, in accordance with section 143 (1) of the *School Act*. This capital bylaw encompasses all capital projects included in the Capital Plan Response Letter, which again represent the Minister-approved capital plan with modifications for the school district. (See Appendix B: Capital Plan Bylaw)

1.9 Project Cost Share

All major capital projects, other than the least cost option for a seismic mitigation project, may require boards of education to share in the cost of the project, including:

- School Addition
- New School
- School Replacement
- Rural Districts Program project
- Seismic Mitigation Project (where a school district is recommending a project scope that is not the least cost option)

The amount of the school district cost share will be assessed by Government on a case-by-case basis dependent on the current financial situation of the school district. A board's ability to contribute has no bearing on the prioritization of projects when the Ministry is developing its capital plan. The value of a board's contribution will be negotiated and determined at the time the PDR is ready for final approval.

The board's contribution can be from a number of sources such as Ministry of Education restricted capital, local capital, operating surplus, etc. Confirmation of a school district's funds available for contribution will be required prior to the Ministry seeking a project funding decision from Government.

2 Roles and Responsibilities

The Ministry of Education is responsible for:

- Maintaining a record of design capacities for all schools
- Collecting student headcount enrolment data from all school districts
- Establishing various programs to address diverse school district capital needs
- Setting funding eligibility criteria for each of its capital programs
- Prioritizing capital project requests at the provincial level based on established project criteria and available funding
- Providing school districts access to capital funds for each project approved in the Ministry's capital plan through the Certificate of Approval system

Each board of education is responsible for:

- Undertaking the ongoing operational management and maintenance of its facilities
- Establishing a Long-Range Facilities Plan (LRF) for its school district
- Pursuing local solutions to capital needs before requesting Provincial capital funding
- Planning and prioritizing capital projects under the Ministry's capital programs
- Funding all costs for project planning, including any reports, as may be required to establish the scope and budget for each requested Minor Capital Program project included in the Capital Plan Intake Spreadsheet
- Funding all costs for preliminary project planning, including any reports, as may be required to establish the proposed scope and budget for each requested Major Capital Program project

3 Major Capital Project Requests

3.1 Year One, Year Two and Year Three Capital Projects

All Major Capital Program projects (including EXP, REP, RDP, SMP) proposed for Year One, Year Two, and Year Three of an annual Five-Year Capital Plan require a project-specific Project Request Fact Sheet (PRFS), project-specific Seismic Project Request Fact Sheet (SPRFS) or a project-specific Demolition Project Request Fact Sheet (DPRFS).

Year One projects should be sufficiently developed to provide a reliable assessment of need, scope of work, schedule and cost estimate. This information allows the Ministry to properly evaluate an individual project request against both Ministry capital program criteria and other capital priorities across the province.

If the Ministry supports a proposed capital project identified as a Year One priority, then it is expected that the project can reasonably be delivered at the scope, schedule and budget identified in the Five-Year Capital Plan. Placeholder projects with inadequate project information should either be included as a Year Four or Year Five project or included as a more immediate capital project request in a future submission when dependable project information has been developed.

If sufficient capital funding is available, the Ministry may request a project listed in Year Two to be accelerated and undertaken in addition to, or instead of, a Year One project.

3.2 Year Four and Year Five Projects

Year Four and Year Five projects are understood to be notional, based on the best cost estimate, scope and schedule information for the project that is available at the time. Understandably, this project information will require further refinement in future Five-Year Capital Plan submissions, as those project requests move into a more imminent timeframe.

3.3 Project Request Fact Sheet (PRFS)/Seismic Project Request Fact Sheet (SPRFS)

The PRFS and SPRFS are relatively simple documents to complete (in most cases not requiring extensive consultant involvement) and provide for a preliminary assessment of a proposed major capital project that a board of education deems to be a high priority for its school district.

To enable the Ministry to gain a reasonable understanding of the priority for a proposed project, the PRFS or SPRFS is intended to outline the particular capital need facing the school district, along with options to feasibly address that need, involving both operational changes and capital solutions, based on student enrolment forecasts and utilization of student space in existing schools.

From the PRFS or SPRFS, the Ministry should be able to discern what risks may exist related either to supporting or deferring a requested project. (See Appendix E: Project Request Fact Sheet and Appendix G: Seismic Project Request Fact Sheet)

3.4 Demolition Project Request Fact Sheet (DPRFS)

The DPRFS is also a simple document to complete, providing a preliminary description of a proposed building demolition project that a board of education wishes to undertake in one of its rural communities that will reduce or eliminate a board liability.

It is intended to provide sufficient background information to enable the Ministry to reasonably understand the benefits from the proposed building demolition project and to determine the project's eligibility for capital funding support under the Rural Districts Program (RDP). (See Appendix D: Demolition Project Request Fact Sheet)

4 Minor Capital Project Requests

4.1 Year One Capital Projects

All Minor Capital Program projects (SEP, CNCP, BUS, PEP, BEP) may only be proposed as Year One projects entered in their appropriate tab of the Capital Plan Intake Spreadsheet.

As a Year One project, the project should be sufficiently developed to provide a reliable assessment of need, scope of work, schedule and cost estimate. Again, if the Ministry supports a Minor Capital Program project, the school district will be expected to deliver it at the scope, schedule and budget, as submitted in the Five-Year Capital Plan, on or before the end of the prospective fiscal year. Some BEP projects may exceed this timeline due to extensive scopes.

5 Capital Plan Intake Spreadsheet

5.1 Capital Plan Intake Spreadsheet Tabs

School districts must enter individual Major Capital Program and Minor Capital Program capital projects under the program-specific tabs provided in the Capital Plan Intake Spreadsheet. These program tabs include:

- SMP Intake
- EXP Intake
- REP Intake
- RDP Intake
- SEP Intake
- CNCP Intake
- BUS Inventory & Intake
- PEP Intake
- BEP Intake

The Capital Plan Intake Spreadsheet also has tabs that provide detailed instructions to

assist with completing the program-specific tabs. These instructional tabs include:

- SMP-EXP-REP-RDP-BEP Instructions
- SEP Instructions
- CNCP Instructions
- BUS Instructions
- PEP Instructions

5.2 Five-Year Capital Plan Summary Tab

The Capital Plan Intake Spreadsheet also provides a Five-Year Capital Plan Summary tab that lists all requested capital projects in priority for each of the Major Capital Programs and Minor Capital Programs.

School districts are not required to enter any data into the Five-Year Capital Plan Summary, as this tab will be automatically populated using the information from the program-specific tabs (as entered by the school district).

The Five-Year Capital Plan Summary tab can be converted into a PDF, allowing the Summary to be forwarded to board of education trustees and school district staff for their review.

The final Five-Year Capital Plan Summary should be attached to the capital plan board resolution that must be adopted by the board of education and provided to the Ministry as part of its Annual Five-Year Capital Plan submission. (See Appendix A: Board Resolution for Five-Year Capital Plan)

PART II: MAJOR CAPITAL FUNDING PROGRAMS

The information outlined in Part II should be read in concert with the information provided in Part I.

1 Seismic Mitigation Program (SMP)

1.1 Background

The Ministry is committed to address the high risk schools identified in the SMP. The Five-Year Capital Plan submission allows the Ministry to annually identify the highest priority projects that should be considered for major capital investment. Critical to this identification is an assessment of current seismic risk.

The Ministry engages structural engineering expertise regarding the assessment and mitigation of seismic risks to public schools through the Engineers and Geoscientists BC (EGBC). The EGBC has developed the Seismic Retrofit Guidelines (SRG), by which all seismic assessments and seismic mitigation work will be assessed and completed.

All seismic risk assessments and re-assessments of schools must be pre-approved, in writing, by the Ministry.

Boards of education are responsible for funding the cost of seismic risk assessments or seismic risk re-assessments, to be completed by a qualified structural engineer possessing the most recent SRG training (currently in its 3rd edition as SRG3).

If an approved seismic assessment or re-assessment of a school indicates a high seismic risk-rating, the documented results must be reported to the Ministry. The Ministry may then request the school district to complete a Seismic Project Identification Report (SPIR) for that school, which would be submitted as part of a future Five-Year Capital Plan submission along with a Seismic Project Request Fact Sheet (SPRFS), for SMP projects. (See Appendix G: Seismic Project Request Fact Sheet)

The SPIR is a specifically formatted report that was developed by EGBC, which is to be used by SRG-trained structural engineers to document seismic mitigation options for a seismically deficient block in a school. A SPIR will define the preliminary scoping and costing for the mitigation strategy proposed. EGBC has provided a guideline for the completion of a SPIR, which also includes fee structures for structural engineers. (See Appendix F: Seismic Project Identification Report Guidelines)

The seismic risk rating criteria established by EGBC for public schools are:

High 1 (H1) - structures at highest risk of widespread damage or structural failure; not repairable after event. Structural and non-structural upgrades required.

High 2 (H2) - structures at high risk of widespread damage or structural failure; likely not repairable after event. Structural and non-structural upgrades required.

High 3 (H3) - isolated failure to building elements (such as walls), are expected; building likely not repairable after event. Structural and non-structural upgrades required.

Medium - isolated damage to building elements is expected; non-structural elements (such as bookshelves, lighting) are at risk of failure. Non-structural upgrades may be required.

Low - least vulnerable structure; isolated damage may be expected with building probably repairable after event. Non-structural upgrades may be required.

1.2 SMP Project Prioritization

Prioritization for funding of seismic projects primarily includes consideration of the level of risk, with the funding of H1, H2 and H3 risks receiving the highest priority consideration by the Ministry.

When prioritizing a school for a SMP project, a school district should consider factors such as the following:

- The risk rating of school blocks that are H1 or H2 or H3
- The LRFP identifies that the school is well utilized and essential for providing continued education programming for students in the school district
- The LRFP identifies the local circumstances that will corroborate the continued student enrolment in the future
- A SPIR has already been submitted in response to a Ministry request
- Availability of student space at neighbouring schools to accommodate current and forecasted student enrolment
- Accommodating students in neighbouring school(s)
- Seismic strengthening of existing school
- Seismic strengthening and partial replacement of existing school
- Full replacement on the existing site
- The Facility Condition Index (FCI) for the school
- Consideration of Life Cycle Costs (LCC) for each option, as the cost of ongoing maintenance over the remaining physical life of an asset is an important financial factor, beyond just capital costs.

1.3 SMP Project Submission Requirements

- Review and update any project that was submitted in the Capital Plan Intake Spreadsheet for the previous Five-Year Capital Plan submission
- Submit a SPRFS for each new high-priority project to be considered for funding under the SMP
- Any SMP project that was previously supported by the Ministry, but is not yet approved with a signed Capital Project Funding Agreement, must be included in the Capital Plan Intake Spreadsheet and ranked as a high-priority

Boards of education are responsible for funding the costs to complete a seismic risk assessment, SPIR and SPRFS.

2 Expansion Program (EXP)

2.1 EXP Project Prioritization

All EXP projects, which include a new school, an addition to an existing school, or the acquisition of a school site for a new or expanded school, must be supported by the need to accommodate student enrolment in a permanent education setting.

When developing a proposal for an EXP project, a school district should consider factors such as the following:

- Student enrolment has continued to increase over the previous five school years
- Student enrolment is forecasted to show continued growth over the next 10 years
- The LRFP identifies the local circumstances that will corroborate the continued student enrolment in the future
- The LRFP identifies how new permanent school space is needed for the provision of education programming for existing students, and students new to the school district
- The availability of properties for development of a school site
- Availability of student space at a neighbouring school(s) to accommodate current and forecasted student enrolment
- Expanded class scheduling for secondary schools
- Avoiding a site acquisition through additions to neighbouring schools
- Acquisition of a school site for a new school
- Acquisition of property to expand an existing school site for an addition

2.2 EXP Site Acquisition Project

Where an expansion of an existing school site or a new school site is required, the respective EXP projects should be split into two separate project requests, with the initial project being the site acquisition and the subsequent project being the addition to an existing school or the design and construction of the new school. The EXP request for a site acquisition will require the same provision of supporting information as requests for an addition to an existing school or a new school.

Notably, a school district must first have a School Site Acquisition Charges (SSAC) scheme in place before the Ministry will support a site acquisition request. The establishment of a new per-dwelling unit SSAC must be based on the demand for new site(s) that results from increased student enrolment due to new residential development, and not from pent-up student enrolment.

Once a SSAC scheme has been established for a school district, the updated ten-year enrolment projections will inform annual consultations between the school district and local government regarding the need and cost estimate for new school sites. The value of the new school sites is the essential component in calculating the per-dwelling unit amount to be collected by local government on behalf of a school district. For further information, refer to the Implementation Guide: School Site Acquisition Charge on the Ministry's Capital Planning Resources webpage at:

<https://www2.gov.bc.ca/gov/content/education-training/k-12/administration/capital/planning/school-site-acquisition>

2.3 EXP Project Submission Requirements

- Review and update any project that was submitted in the Capital Plan Intake Spreadsheet for the previous Five-Year Capital Plan submission. There are dedicated pulldown menus in the Capital Plan Intake Spreadsheet for this.
- Submit a PRFS for each new high-priority project to be considered for funding under the EXP.
- Any EXP project that was previously supported by the Ministry but is not yet approved with a signed Capital Project Funding Agreement, must be included in the Capital Plan Intake Spreadsheet and ranked as a high-priority.

Boards of education are responsible for funding all preliminary and detailed project development work required to advance a project for funding decision, including the completion of the PRFS. (See Appendix E: Project Request Fact Sheet)

3 Replacement Program (REP)

3.1 REP Project Prioritization

All REP projects, which include a full replacement school or a partial replacement of an existing school, must be supported by a recent building condition assessment and engineering reports substantiating that the school building or a portion of a school has reached or will shortly reach the end of its expected useful life.

When developing a proposal for a REP project, a school district should consider factors such as the following:

- The LRFP identifies that the school is essential for providing continued education programming for students in the school district
- Availability of adequate student space at neighbouring schools to accommodate current and forecasted student enrolment
- The Facility Condition Index (FCI) for the school
- Any immediate health and safety issues facing occupants and visitors to the school
- The cost-effectiveness of further capital investment, using either AFG or SEP funds, to maintain or upgrade the school to extend its useful life
- The cost of addressing major structural issues or an accumulation of maintenance requirements approaches the cost of replacement
- Major renovations to the existing school
- Additions to neighbouring schools
- Partial replacement of the existing school
- Partial replacement of the existing school with additions to neighbouring schools
- Full replacement of the school on its current site
- Full replacement of the school on a new school site

- Consideration of Life Cycle Costs (LCC) for each option, as the cost of ongoing maintenance over the remaining physical life of an asset is an important financial factor, beyond just capital costs.

3.2 REP Project Submission Requirements

- Review and update any project that was submitted in in the Capital Plan Intake Spreadsheet for the previous Five-Year Capital Plan submission
- Submit a PRFS for each new high-priority project to be considered for funding under the REP
- Any REP project that was previously supported by the Ministry, but is not yet approved with a signed Capital Project Funding Agreement, must be included in the Capital Plan Intake Spreadsheet and ranked as a high priority

Boards of education are responsible to fund both the preliminary and detailed project development work required to advance projects for funding decision, including the completion of the PRFS. (See Appendix E: Project Request Fact Sheet)

4 Rural Districts Program (RDP)

4.1 Background

Capital funds are available by the Ministry under the Rural Districts Program (RDP) for projects to assist those school districts with schools in rural communities. The intention of the RDP is to target funding for specific types of projects that would directly benefit rural communities but are typically not included under another Major Capital Program or Minor Capital Program. Specifically, RDP will provide funding for the full and partial demolition of board-owned buildings, for capital projects, such as renovations associated with the consolidation of under-utilized schools, and in some cases additions or replacement of small facilities with projects limited to a maximum of \$5 million.

The RDP funding will only be considered for communities with a population of less than 15,000 inhabitants in those school districts located outside of the Lower Mainland, Greater Victoria, and Kelowna.

4.2 Building Demolition

RDP projects will primarily focus on the full demolition of vacant board-owned buildings that have become dilapidated and where refurbishment for school district or community use is not economically feasible.

Funding support under the RDP will also be considered for the partial demolition of functioning buildings that have extensive extraneous areas that are no longer of use to the school district or community. The intention is that by reducing its overall area through a partial demolition, a building may then operate with greater efficiency, requiring less energy and avoiding the extent of required ongoing maintenance.

4.2.1 Building Demolition Project Prioritization

The Ministry may give a higher priority to the full demolition of a surplus board-owned building encumbering a school site that is the subject of a Crown land grant, followed by buildings situated on a property owned outright by the board, and then the partial demolition of buildings that will continue to be operational.

A board may seek to revert Crown land that is no longer required for educational purposes, under authority of the *School Act*. However, the Crown may refuse to receive any such property, unless it is a brownfield site where any encumbering buildings have first been removed and the site has undergone any necessary remediation. In these circumstances, RDP funding will assist the school district to complete the demolition and any needed site remediation.

There are also situations where the cost of demolishing a building may be greater than the potential sales value of the site owned outright by a board of education located in a rural community. As this situation renders the property disposal economically unviable to a school district, priority is next given to providing RDP funding for the demolition of an encumbering building. Even if the unencumbered property will be transferred for an alternative community use at less than fair market value, the receiving community organization will benefit by being able to direct its available funds solely to the re-development of a clean vacant site.

The Ministry will also consider allocating RDP funding for the partial demolition of a functional building. A school district will need to present the case that the specified reduction of existing space at an under-utilized building, which remains required in support of school district operations, will result in demonstrable operational cost-savings both through reductions in energy-use and ongoing maintenance requirements.

4.2.2 Building Demolition Project Submission Requirements

- Submit a DPRFS for a project to be considered for funding under the RDP

Boards of education are responsible to fund both the preliminary and detailed project development work required to advance projects for funding decision, including the completion of the DPRFS. (See Appendix D: Demolition Project Request Fact Sheet)

4.3 School Consolidations

Another area of RDP funding support relates to the completion of a board-approved consolidation of schools in a rural community that has experienced declines or shifts in student enrolment resulting in the inefficient utilization of the capacity of existing schools. The consolidation of schools should provide immediate operating efficiencies by providing educational programming in less physical space.

It is expected the school(s) that will remain operational will have sufficient capacity to

accommodate the incoming students; however, in some instance the receiving school(s) may need the renovation/reconfiguration of existing space, or a small addition, for the consolidation to be effective.

A school district is advised to contact its respective Planning Officer to discuss the potential provision of capital funding an RDP project involving the consolidation of schools in a rural community.

4.3.1 School Consolidations Prioritization

School consolidation projects will be prioritized where a board of education has previously approved the consolidation to occur. Those projects where the scope is limited to the renovation of an existing building to accommodate students from another will be prioritized over those projects where an addition is required.

4.3.2 School Consolidations Project Submission Requirements

- Submit a Project Request Fact Sheet for a project to be considered for funding under the RDP

Boards of education are responsible to fund both the preliminary and detailed project development work required to advance projects for funding decision, including the completion of the PRFS. (See Appendix E: Project Request Fact Sheet)

PART III: MINOR CAPITAL FUNDING PROGRAMS

The information outlined in Part III should be read in concert with the information provided in Part I.

1 School Enhancement Program (SEP)

The SEP is a program that provides capital funding specifically for projects that will improve the safety, facility condition, operational efficiency, and functionality of existing schools, in an effort to extend their useful physical life.

1.1 SEP Project Funding Criteria

SEP projects that are eligible for funding are:

1. Roofing upgrades (i.e., replacement, repair)
2. Exterior Wall System upgrades (i.e., cladding, insulation, windows, building envelope)
3. Interior Construction upgrades (i.e., interior accessibility, flooring, wall partitions)
4. HVAC upgrades (i.e., heating, ventilation, air conditioning)
5. Electrical upgrades (i.e., power supply, distribution systems, fire protection systems)
6. Plumbing upgrades (i.e., washrooms, water fountains, re-piping)

Eligible projects must be valued at more than \$100,000, but not exceed \$2,000,000. **It is also crucial to include at least one project valued at \$500,000 or less.** Projects valued over \$2,000,000 must be identified on the Capital Plan Intake Spreadsheet as being phased over multiple years.

To qualify for the minimum \$100,000 threshold, a number of smaller projects for various schools may be grouped to form a single SEP project. Otherwise, work estimated at less than \$100,000 to maintain the service-life of an existing building should not be included in an annual Five-Year Capital Plan submission, but undertaken using AFG funds or local capital funds.

The types of maintenance work that are ineligible for SEP funding include, but not limited to:

- day-to-day wear and tear
- interior painting
- exterior painting
- parking lot repairs or development
- driveway repairs or development
- playground and playfield repairs or development
- School Board offices, bus depots/buildings, maintenance shops/buildings, etc

1.2 SEP Project Submission Requirements

- All SEP project requests must be submitted using the Capital Plan Intake Spreadsheet

- A maximum of five (5) separate SEP projects may be submitted per school district, for funding consideration by the Ministry (with at least one project valued at \$500,000 or less)
- A PRFS is not required for a proposed SEP project
- Only SEP projects (single phase; or one of two (or more) phases) that can be completed by March 31st of the prospective fiscal year should be submitted
- For a newly-requested multi-phase SEP project, only the first phase of SEP work should be included in Year One of the Capital Plan Intake Spreadsheet; the second phase of SEP work is to be noted in the Project Description section
- For an existing multi-phase SEP project that has already completed the first phase of SEP work, the second (and future) phase(s) of SEP work should be included in Year One of the Capital Plan Intake Spreadsheet; and so on.

2 Carbon Neutral Capital Program (CNCP)

The CNCP is a program that provides capital funding specifically for energy-efficiency projects that lower a school district's carbon emissions.

2.1 CNCP Project Funding Criteria

The primary considerations in evaluating submitted project proposals will be the measurable emissions reductions and operational cost-savings expected as a result of the completed project. Other considerations include:

- The level of innovation of the intended project on a facility or a district-wide basis
- The VFA Canada Corporation renewal period of the proposed project
- The contributions to be made towards the cost of the proposed project by the school district and third parties
- CNCP funding received by the school district to date

When selecting priorities for CNCP funding, the school district should consider the following:

- The measurable short and long term emissions reductions and operational cost savings
- Coordination with other capital program needs for the schools (i.e., SMP or SEP)
- The LRFP identifies that the school is essential for providing continued education programming for students in the school district
- Previous recent projects have been delivered within the scope, schedule and budget
- The school district has the resources to successfully deliver the project.

2.2 CNCP Project Submission Requirements

- All project proposals must be submitted using the Capital Plan Intake Spreadsheet. The spreadsheet must be filled out completely as per the instructions provided.
- Submit supporting reports in PDF format (i.e., Energy Manager Reports, VFA Canada Corporation Reports, Engineering Reports)

- A maximum of five (5) separate CNCP projects may be submitted per school district, for funding consideration by the Ministry. Smaller projects for a number of various schools, as part of a wider school district carbon-reduction projects, may be grouped to form a single project proposal
- A PRFS is not required for a proposed CNCP project
- Only CNCP projects that can be completed by March 31st of the prospective fiscal year should be submitted
- For a newly-requested multi-phase CNCP project, only the first phase of CNCP work should be included in Year One of the Capital Plan Intake Spreadsheet; the second phase of CNCP work is to be noted in the Project Description section
- For an existing multi-phase CNCP project that has already completed the first phase of CNCP work, the second (and future) phase(s) of CNCP work should be included in Year One of the Capital Plan Intake Spreadsheet; and so on.

3 Bus Acquisition Program (BUS)

School buses are considered capital assets and capital funding requests to acquire any new or replacement buses must be made to the Ministry as part of a school district's annual Five-Year Capital Plan submission.

3.1 BUS Project Funding Criteria

Bus funding requests will consider the following;

- School bus age and/or mileage
 - school bus age will be determined from the year it was put into service
 - mileage will be determined using the date of funding request submission
- Existing buses with safety and mechanical issues
- New school buses to support new trips on existing routes due to increased student enrolment or new routes to newly serve areas of the school district without current student transportation service
- School district's intention to create their own bussing services versus using third-party contracted services

Replacement of an existing school bus will be considered for the following situations:

- Type A2 buses (20-29 passengers), which are 10 years old and/or have more than 250,000 km
- Type C buses (34-76 passengers), which are 12 years old and/or have more than 325,000 km
- Type D-RE & Type D-FE (80+ passengers), which are 15 years old and/or have more than 400,000 km
- None of the above applies, but the need for replacement can be substantiated with supplementary information by a qualified third-party

A bus that has been replaced may not be used for any permanent routes, and once a bus has been claimed for replacement, under no circumstances may it be claimed again. This

includes buses that have been sold by one school district to another school district.

Where approved by the Ministry, bus acquisition funding will be based on a capital allowance. School districts must procure their school buses using the annual Request for Standing Offer (RFSO) process managed by the Association of School Transportation Services of British Columbia (ASTSBC).

The ASTSBC will invoice school districts for two (2) percent of their bus purchase price to defray the cost of administering this initiative. This fee is included in the Capital Funding Grant and is not an additional cost to the school district. Public schools that are in arrears of their administration fee payment from purchases under previous RFSOs will be ineligible for future standing offer procurements.

Details of the RFSO can be found at: <http://www.astsbcc.org/>

3.2 BUS Inventory

To assist the Ministry in its long-term planning and forecasting of bus replacements throughout the province, school districts must provide an update to their entire existing bus inventory each year in the Capital Plan Intake Spreadsheet using the Bus Inventory and Intake tab.

3.3 BUS Project Submission Requirements

- All bus requests must be submitted using the Capital Plan Intake Spreadsheet. The spreadsheet must be filled out completely as per the instructions provided
- Submit the school district's bus inventory in the Capital Plan Intake Spreadsheet using the Bus Inventory and Intake tab
- For replacement due to safety and mechanical issues, submit the following documents:
 - detailed description of the safety and or mechanical issues with costs, supported by supplementary documentation from a qualified third-party (i.e. repair/mechanical shop, insurance company)
 - the latest Ministry of Transportation and Infrastructure (or CVSE) inspection report verifying the bus unit number, age, condition and number of kilometres and identified issues
- For additional buses for new routes or trips, submit the following documents:
 - rationale for the request that demonstrates the increase ridership and are to include copies of route sheets, route maps, and supporting route optimization analysis
- For replacement of existing buses, submit the following documents:
 - if bus has met both age and mileage criteria, no additional documentation is required
 - if bus replacement is sooner than outlined in Ministry guidelines for age and/or mileage, the reasons for early replacement and recent maintenance costs records are required (supported by the latest Ministry of Transportation and Infrastructure (or CVSE) inspection report verifying the bus unit number, age, condition and number of kilometres and identified issues)

- For creation of school district owned bussing services, submit the following documents:
 - rationale for the request that demonstrates operational cost-benefit analysis of owned bussing services versus using third-party contracted services, and are to include copies of fleet management plan, route sheets, route maps, and supporting route optimization analysis
- A PRFS is not required for a proposed bus acquisition
- Bus purchases must be completed using the RFSO process, with goods received by March 31st of the prospective fiscal year

4 Playground Equipment Program (PEP)

Supporting inclusion and accessibility for all children, the PEP is available to provide specific funding to purchase and install new or replacement playground equipment that is universal in design, and is in compliance with accessibility measures as defined through the [Canadian Standards Association CAN/CSA-Z614-14 \(R2019\): Children's Playspaces and Equipment](#)

Universal design aims to create environments that can be used by as many people as possible without special adaptations or modifications, and projects should include equipment and appropriate surfacing which create an inclusive and accessible playground concept.

Universally designed playground spaces include adventure-style playground equipment that is designed to include all elementary-aged students regardless of ability.

To meet the range of students' needs in designing playgrounds to include every child, school districts should consider all physical, mental, intellectual, learning, communication or sensory impairment – or functional limitations – whether permanent, temporary or episodic in nature, that in interaction with a barrier, hinders a person's full an equal participation in society.

This equipment is to be permanently fixed on a school site and include appropriate ground cover for fall protection, improved access, and increased mobility.

4.1 PEP Project Funding Criteria

Only schools where the majority of grades are elementary (K-7) will be eligible for PEP. With a focus on full playground equipment replacement, projects for partial replacement of existing equipment or repair of existing equipment will not be considered. Schools that do not currently have playground equipment and students do not have easy access to nearby equipment, will be prioritized.

4.2 PEP Project Submission Requirements

- All proposed PEP projects must be submitted using the Capital Plan Intake Spreadsheet.

- A maximum of three (3) separate PEP projects may be submitted per school district, for funding consideration by the Ministry. Only PEP projects that can be completed by March 31st of the prospective fiscal year should be submitted
- PEP projects that have previously been supported by the Ministry to receive capital funding must not be included in the Capital Plan Intake Spreadsheet.

5 Building Envelope Program (BEP)

The BEP is a program that is available to provide specific funding for remediation to known building envelope issues at schools that were built between the years of 1985 and 2000; that have undergone a Building Envelope Condition Assessment (BECA) by BC Housing; and that are on BC Housing's list of eligible schools.

5.1 BEP Project Prioritization

School districts have previously been provided with a list of their BEP projects, as ranked by BC Housing. While the Ministry will use the BC Housing rankings as a guide for prioritizing BEP funding, a school district may work with the Ministry to amend that priority, if necessary.

When developing a proposal for a BEP project, a school district should consider the following factors:

- The LRFP identifies that the school is essential for providing continued education programming for students in the school district
- The Facility Condition Index (FCI) for the school
- The priority ranking of the school by BC Housing
- Opportunities to coordinate the BEP project with other required building upgrades under AFG, SMP, SEP or EXP (i.e., an addition).

5.2 BEP Project Submission Requirements

- Review and update any BEP project that was submitted in the Capital Plan Intake Spreadsheet for the previous Five-Year Capital Plan submission
- Any BEP project that was previously supported by the Ministry, but is not yet approved to proceed, must be included in the Capital Plan Intake Spreadsheet and ranked as a high priority
- A PRFS is not required for a proposed BEP project.

PART IV: SUMMARY OF FIVE-YEAR CAPITAL PLAN SUBMISSION FORMS

The following table provides a summary of forms required as part of a board of education's Annual Five-Year Capital Plan submission to the Ministry.

Table 1 – Five-Year Capital Plan Submission Forms

Form	Source	Requirements	Submission Type
School District Summary of Capacity & Projected Enrolment	RDECP System	<ul style="list-style-type: none"> Enter 10-year enrolment projections by grade for each open school 	Online CP-3 Form
Designated users may access Remote Data Entry Capital Planning (RDECP) system at: http://rdecp.educ.gov.bc.ca/pls/rdecp/rde_html_main_pk.rdecp NOTE: If CP-3 Form unavailable, contact your respective Ministry Planning Officer			
Board of Education Capital Plan Resolution	Board of Education	<ul style="list-style-type: none"> Submit copy of board-adopted resolution See Appendix A: Board Resolution for Five-Year Capital Plan 	Email PDF document
Project Request Fact Sheet (PRFS)/Seismic Project Request Fact Sheet (SPRFS)/Demolition Project Request Fact Sheet (DPRFS)	School District	<ul style="list-style-type: none"> Submit PRFS for proposed EXP projects Submit PRFS for proposed REP projects Submit SPRFS for proposed SMP projects Submit DPRFS for proposed demolition projects Submit PRFS for other RDP projects See Appendix E: Project Request Fact Sheet (PRFS) See Appendix G: Seismic Project Request Fact Sheet (SPRFS) See Appendix D: Demolition Project Request Fact Sheet (DPRFS) 	Email Word document
SMP Projects Tab	Capital Plan Intake Spreadsheet	<ul style="list-style-type: none"> Review and update previously-submitted SMP projects Ensure supported SMP projects without a signed Capital Project Funding Agreement are ranked as a high priority Submit new SMP projects SPRFS are required for SMP projects 	Email Excel document

Form	Source	Requirements	Submission Type
EXP & REP Projects Tab	Capital Plan Intake Spreadsheet	<ul style="list-style-type: none"> Review and update previously-submitted EXP and REP projects Submit a PRFS for new high-priority EXP and REP projects See Appendix E: Project Request Fact Sheet Ensure supported EXP and REP projects without a signed Capital Project Funding Agreement are ranked as a high priority 	Email Excel document
RDP Renovation Projects Tab	Capital Plan Intake Spreadsheet	<ul style="list-style-type: none"> Submit new RDP projects 	Email Excel document
BEP Projects Tab	Capital Plan Intake Spreadsheet	<ul style="list-style-type: none"> Review and update previously-submitted BEP projects A PRFS is not required for a proposed BEP project 	Email Excel document
SEP Projects Tab	Capital Plan Intake Spreadsheet	<ul style="list-style-type: none"> Submit a maximum of five (5) proposed SEP projects A PRFS is not required for a proposed SEP project To be eligible for SEP capital funding, a proposed project must be able to be completed by March 31st of the prospective fiscal year 	Email Excel document
CNCP Projects Tab	Capital Plan Intake Spreadsheet	<ul style="list-style-type: none"> Submit a maximum of five (5) proposed CNCP projects A PRFS is not required for a proposed CNCP project To be eligible for CNCP capital funding, a proposed project must be able to be completed by March 31st of the prospective fiscal year 	Email Excel document
BUS Projects Tab	Capital Plan Intake Spreadsheet	<p>For replacement buses due to safety and mechanical issues, submit the following documents:</p> <ul style="list-style-type: none"> detailed description of the safety and or mechanical issues with costs, supported by supplementary documentation from a qualified third-party (i.e. repair/mechanical shop, insurance company) the latest Ministry of Transportation and Infrastructure (or CVSE) inspection report verifying the bus unit number, age, condition and number of 	Email Excel document

Form	Source	Requirements	Submission Type
		<p>kilometres and identified issues</p> <p>For additional buses for new routes or trips, submit the following documents:</p> <ul style="list-style-type: none"> • rationale for the request that demonstrates the increase ridership and are to include copies of route sheets, route maps, and supporting route optimization analysis <p>For replacement of existing buses, submit the following documents:</p> <ul style="list-style-type: none"> • if bus has met both age and mileage criteria, no additional documentation is required • if bus replacement is sooner than provided in Ministry guidelines, the reasons for early replacement and recent maintenance costs records are required (supported by the latest Ministry of Transportation and Infrastructure (or CVSE) inspection report verifying the bus unit number, age, condition and number of kilometres and identified issues) <p>For creation of school district owned bussing services, submit the following documents:</p> <ul style="list-style-type: none"> • rationale for the request that demonstrates operational cost-benefit analysis of owned bussing services versus using third-party contracted services, and are to include copies of fleet management plan, route sheets, route maps, and supporting route optimization analysis • PRFSs are not required for BUS projects • To be eligible for BUS capital funding, a requested bus must be deliverable by March 31st of the prospective fiscal year 	
PEP Projects Tab	Capital Plan Intake Spreadsheet	<ul style="list-style-type: none"> • Submit a maximum of three (3) proposed PEP project proposals. • PRFS is not required • To be eligible for PEP capital funding, a proposed project must be able to be completed by March 31st of the prospective fiscal year 	Email Excel document

Form	Source	Requirements	Submission Type
Five-Year Capital Plan Summary Tab	Capital Plan Intake Spreadsheet	<ul style="list-style-type: none">• No action required• Summary Tab is automatically populated using information from the individual capital programs tabs	Email Excel document

PART V: FIVE-YEAR CAPITAL PLAN TIMELINES

2020/21 Five-Year Capital Plan Timelines	
April 2020	<ul style="list-style-type: none"> Capital Plan Instructions: Five-Year Capital Plan Submission for 2021/22 and Appendices posted on Ministry's website at https://www2.gov.bc.ca/gov/content/education-training/k-12/administration/capital/planning
April – July 2020	<ul style="list-style-type: none"> School districts are to work with their respective Ministry Planning Officer in updating requested capital projects and preparing new supporting documentation, for the Five-Year Capital Plan submission for 2021/22. Prior to seeking a board resolution, school districts should review their final Capital Plan Intake Spreadsheet and Five-Year Capital Plan Summary Spreadsheet with their respective Planning Officer to ensure all data fields are completed appropriately.
July 31, 2020	<ul style="list-style-type: none"> Due date for all boards to submit Five-Year Capital Plan submissions for 2021/22 to the Ministry, which must include: <ul style="list-style-type: none"> Board Resolution adopting the 2021/22 capital plan submission Capital Plan Intake Spreadsheet School District Summary of Capacity and Projected Enrolment Form (CP-3) Other documentation as required or requested
August – December 2020	<ul style="list-style-type: none"> Ministry reviews all capital plan submissions, and applies program eligibility criteria to requested capital projects and provincially ranks eligible capital projects.
January – March 2021	<ul style="list-style-type: none"> Ministry develops and approves recommended project list for inclusion in the Ministry Capital Plan. Government approval granted for Ministry Capital Plan. Ministry issues Capital Plan Response Letters, including Annual Programs Funding Agreement, to school districts. School districts submit to the Ministry a board-adopted Capital Plan Bylaws confirming Minister approved capital plan projects.

APPENDICES

NOTE: Please follow the link below to the applicable web pages for each Appendices item.

<https://www2.gov.bc.ca/gov/content/education-training/k-12/administration/capital/planning>

Appendix A: Board Resolution for Five-Year Capital Plan

Appendix B: Capital Plan Bylaw

Appendix C: Long-Range Facilities Plan Guidelines

Appendix D: Demolition Project Request Fact Sheet

Appendix E: Project Request Fact Sheet

Appendix F: Seismic Project Identification Report Guidelines

Appendix G: Seismic Project Request Fact Sheet