



**2016/17**  
**Capital Plan Instructions (v2)**

***These Capital Plan Instructions Supersede All Previous Editions***

Ministry of Education  
Capital Division  
September 2016

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## **PART I: OVERVIEW**

### **1 Introduction**

These instructions are intended to provide direction to school districts on:

- the Ministry's current capital programs
- the criteria used to establish provincial funding priorities for each capital program, and
- the format and timing of the school districts' annual Five-Year Capital Plan submissions.

The priority of the Ministry's capital program is to ensure schools are safe, well-functioning and available to rapidly growing enrollment areas.

These Capital Plan Instructions supersede all previous editions.

#### **1.1 Submission Deadlines**

School districts must submit their 2016/17 annual Five-Year Capital Plan and supporting documentation by September 30<sup>th</sup>, 2016. In accordance with Section 142 of the *School Act*, annual Five-Year Capital Plan submissions must be approved by resolution of the school districts Board of Education (Board).

#### **1.2 Capital Programs**

The Ministry is seeking submissions for consideration for the following capital programs:

- Seismic Mitigation Program (SMP)
- School Expansion Program (EXP)
- School Replacement Program (REP)
- Building Envelope Program (BEP)
- School Enhancement Program (SEP)
- Carbon Neutral Capital Program (CNCP)
- Bus Replacement Program (BUS)

#### **1.3 Purpose of Annual Five-Year Capital Plan Process**

School districts' annual Five-Year Capital Plan submissions are used to inform the selection of priority capital projects for the Ministry's following fiscal year. They also provide the Ministry insight into future year priorities that are used in the Three-Year Fiscal Plan and longer term capital planning.

## **1.4 Capital Plan Response Letters**

In accordance with Section 142(5) of the School Act, the Ministry will provide each school district a written response to their annual Five-Year Capital Plan submission once the assessment of all submissions are complete and funding for fiscal 2017/18 is announced by the Ministry.

This written response will identify the next steps for supported projects which may include:

- Proceed to design, tender and construction
- Proceed to development of a Project Definition Report (PDR)
- Proceed to acquire site
- Proceed to acquire bus

The Ministry also provides school districts with an Annual Facility Grant (AFG) based on an established formula. The AFG is managed separately from the annual Five-Year Capital Plan submissions. As such, AFG is excluded from these Capital Plan Instructions.

## **1.5 Capital Bylaw**

In accordance with Section 143, the Board must adopt their annual Five-Year Capital Plan and the Ministry's Capital Plan Response Letter with a capital bylaw (see Appendix H: Capital Bylaw).

## 2 Roles and Responsibilities

In order to successfully operate and maintain the almost 1,600 schools across the province, both the Ministry and the school districts must fulfill their responsibilities in relation to the Ministry of Finance's [Capital Asset Management Framework \(CAMF\)](#).

The Ministry of Education is accountable and responsible for the establishment and maintenance of provincial standards for:

- functional requirements and area standards of schools
- capacity of schools
- enrollment counts
- allowable capital costing
- capital program eligibility criteria
- provincial prioritization of capital projects
- approval of capital projects within the Ministry's capital funding envelope
- the establishment of monetary safeguards and expenditure forecasting and reporting requirements
- the establishment of terms and conditions of capital funding

The School Districts are accountable and responsible for:

- day to day capital asset management and maintenance
- planning and prioritization of capital priorities
- establishment of catchment areas
- establishment of capital programming
- optimization of available classroom space
- pursuing local solutions to capital needs before requesting capital funding
- effective project management
- cost effective designs that ensure the best value for investment
- ensuring projects comply with provincial standards
- ensuring all approved capital projects are delivered in accordance with the terms and conditions of the capital funding project agreement

### 3 Facilities Planning & Project Development Process

#### 3.1 Long Range Facilities Plan (LRFP)

Maintaining a current, comprehensive LRFP that forms the basis for school districts' capital investment decisions and aligns with best practices in asset management is a key component for district-wide capital planning, and a framework for other local programming and operational decisions.

The LRFP should use a ten-year planning horizon with consideration for the longer term. The scope and emphasis of each LRFP will vary depending on the specific circumstances and priorities of each school district (see Appendix G: Long Range Facilities Guidelines).

School districts are required to develop and maintain a comprehensive LRFP, and to be made available upon Ministry request.

#### 3.2 Capital Submission Overview

Projects will follow either a 1-stage or a 2-stage capital submission process.

##### 1-Stage Capital Submission Process

In order for projects to qualify for BEP, SEP, CNCP, or BUS funding, decisions will typically be based on the information provided during the annual Five-Year Capital Plan submission. The Ministry will provide instruction to the school districts via the Capital Plan Response Letter as to which projects are supported to proceed in the upcoming fiscal year.

The BEP, SEP, CNCP and BUS are a 1-stage capital submission process. Below is an illustrative flow diagram to showcase the process.

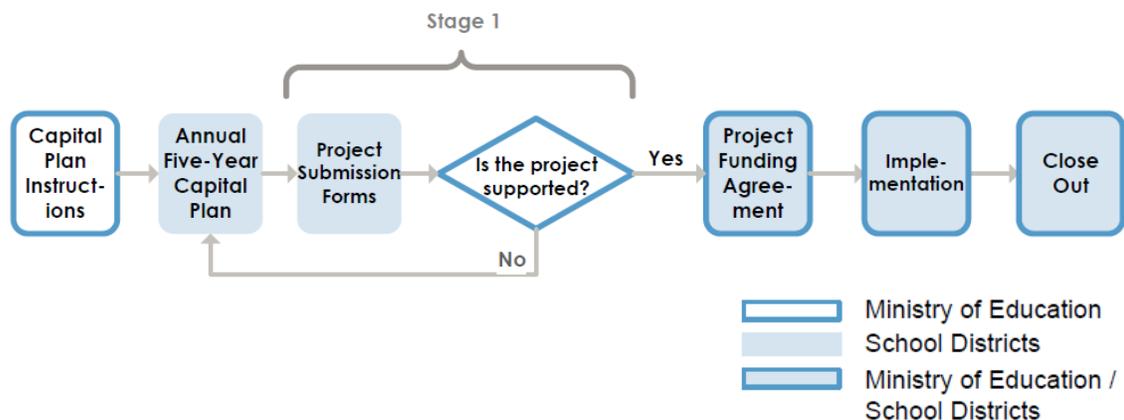


Figure 3-1. 1-Stage Capital Submission Process for BEP, SEP, CNCP, BUS

## 2-Stage Capital Submission Process

For projects qualifying for SMP, EXP and REP funding, the Ministry will provide instruction as to “next steps” in project development to the school district via the Capital Plan Response Letter.

The SMP, EXP and REP projects are a 2-stage capital submission process. Below is an illustrative flow diagram to showcase the process.

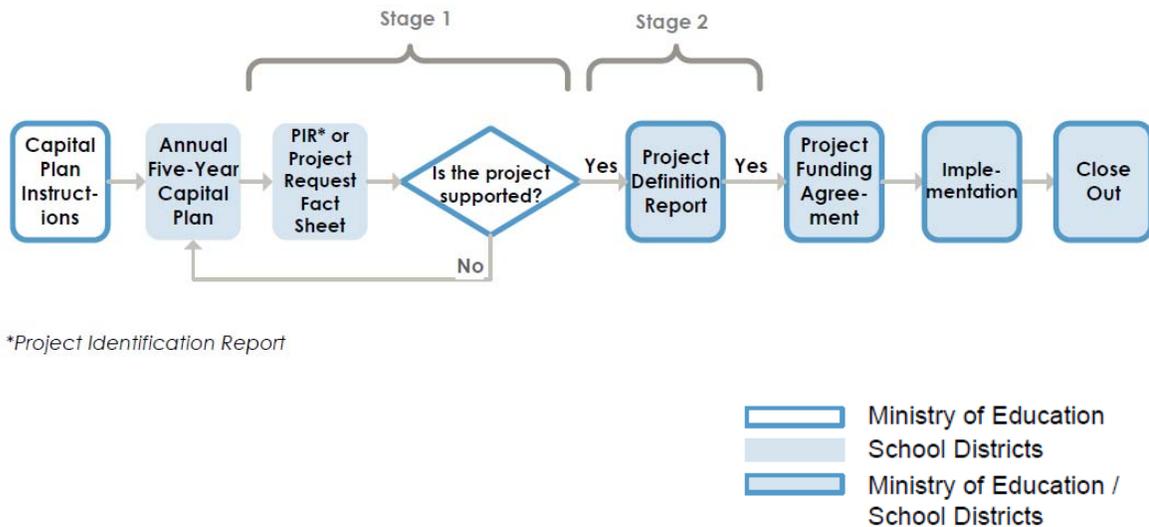


Figure 3-2. 2-Stage Capital Submission Process for SMP, EXP, REP

School districts are responsible to fund both the preliminary and detailed project development work required to advance projects for funding decision. However, these costs can be recovered from the project budget once the project is approved and a Capital Project Funding Agreement is in place. Additionally, school districts can utilize funds within their restricted capital account to fund project development activities, but only with prior written approval from the Ministry.

### 3.3 Capital Submission Phase Overview

**Annual Five-Year Capital Plan Submission** – informed by a LRFP, school districts assessing capital needs over the next five years involves; prioritizing capital needs and undertaking preliminary assessment of project needs, options, scoping and costing, and developing and submitting a Five-Year Capital Plan along with supporting assessment documents such as Project Identification Reports (PIR) or Project Request Fact Sheet (PRFS).

**Projects listed within year one or two of the annual Five-Year Capital Plan submission** should be sufficiently developed to provide a reliable assessment of need, scope of work, schedule and cost estimate. Should the Ministry support

projects identified within year one, it is the expectation of the Ministry that the project can be delivered at the scope, schedule and budget identified within the plan. The Ministry may also request projects listed in year two be accelerated, should capital funding be available.

***Projects listed within years two and three of the annual Five-Year Capital Plan*** must include factual information outlining the need, all possible options for addressing the need, description of scope, estimate of costs, and identification of risks sufficiently to enable the Ministry to gain a thorough understanding of the priority and to assess the priority against both Ministry capital program criteria and other capital priorities across the province.

***Projects listed within years four and five of the annual Five-Year Capital Plan*** are understood to be notional projects, based on the best information available at the time, with a rough estimate of costs, and will require further refinement in future year submissions.

***Project Identification Report (PIR)*** (soon to be phased out and replaced by PRFS) – involves preparation of a report that compiles all preliminary assessments of capital need(s), assessing all reasonable options to address the need (including assessment of resolving the issue through operational changes and space optimization), outlining the current and future forecasted use of the school, estimating the associated costs and savings for each option, identifying potential funding sources, identifying potential risks, and may include preliminary engineering assessments (geotechnical, environmental, hazardous material, etc.)

To streamline the annual capital submission process and aide in consistency of project information provided, the Ministry has implemented the use of a PRFS, in lieu of PIR, which will ensure the provision of enough information to assess and compare preliminary capital funding needs, options and costs across all school districts (see Appendix F: Project Request Fact Sheet). This process is intended to replace the PIR. The Ministry will continue to accept PIRs, in lieu of PRFS, that have already been developed providing the information is updated per submission.

***Project Request Fact Sheet (PRFS)*** - For all projects identified within the first three years of the annual Five-Year Capital Plan, school districts will need to provide a project specific PRFS and may be required to provide other supporting documentation to demonstrate the need and confirm all reasonable options, benefits and costs have been objectively considered.

A PRFS template is provided (see Appendix F: Project Request Fact Sheet) and includes:

- project rationale
- options considered
- options scope
- estimated schedule

- estimated costs
- enrollment current and ten-year forecast
- surrounding school utilization and ten-year forecasts
- facility condition index (FCI)
- etc

***Project Definition Report (PDR)*** – involves further, more detailed assessment of need, options, costs, benefits, risks, engineering, design, environmental requirements, permit requirements and all other items affecting project scope, schedule or budget. PDRs are typically only required for “major capital investments such as SMP, EXP and REP” and should include 3 to 4 possible options for addressing the capital need. They should also assess the current and future forecasted use of the school, family of schools and district as a whole, as well as the associated cost estimate and savings for each option, the school condition assessment, the geotechnical, hazardous materials, and environmental requirements, include site drawings, and identify potential funding sources, and potential risks and risk mitigation options.

School districts must provide a final PDR by the date specified within the Capital Plan Response Letter, accompanied by an email / letter confirming it is final and that the information within is reliable for seeking funding approval.

The Ministry will rely on the information within the PDR to seek project funding approval. Therefore, final PDRs should be developed such that the information and estimates provided are “reliable” for 6 months past final submission. Should funding decision not be rendered within 6 months, the Ministry will allow the school district an opportunity to update the PDR based on current market information.

The Ministry will not review submitted PDRs that have not been identified within the Capital Plan Response Letter.

***Capital Project Funding Agreement*** – involves the execution of a project specific agreement that defines scope, schedule, budget, reporting requirements, roles and responsibilities, and terms and conditions of the funding. Once the Capital Project Funding Agreement is executed and a Certificate of Approval is issued, school districts can recover costs of project development from the project budget.

***Implementation*** – involves the design, tender and construction of projects on scope, schedule and budget, public communication in accordance with the terms and conditions of the capital project funding agreement.

***Close Out*** – upon completion of the capital project, school districts are required to submit close-out reports to the Ministry, as well as provide as-built drawings to the Ministry. Procurement and financial audits may also be requested by the Ministry.

### 3.4 Optimal Space Utilization Guidelines

This section provides a general overview for space optimization. Specific capital program capacity utilization requirements will be found in program sections of these Capital Plan Instructions.

The Ministry requires that the school district demonstrate within the PIR/PRFS and PDR that they have “optimized” the available space within the school district to rationalize the need for a seismic upgrade or school replacement, or to address over-utilization of schools within the district, with the intention to ensure best use of available funding for maintenance and operation.

What is considered “optimal space utilization” varies between large urban districts and small rural districts due to practical realities of population distribution, density, travel distances, and weather extremes. Additionally, an approach to optimizing space utilization varies between school districts due to declining enrollment, stable enrollment, increasing enrollment or shifting enrollment within the school district. As such, the Ministry will assess what is practical and achievable on a project specific basis as part of the PIR/PRFS and PDR.

The purpose of optimizing space utilization is to ensure sufficient space is available to students today and for enrollment forecasts over the next 10 years, while minimizing the costs of construction, operation and maintenance arising from inefficient use – ultimately so the maximum amount of funding can be directed to instruction and programming.

Key to optimizing space utilization is that schools “highest and best use” is for instruction of students. Although broader community services and programs may be co-located within schools, where space has become available due to declining enrollment; if the space was initially purpose-built for instruction it is considered instructional space and should be converted back to instructional space if needed. Classrooms, whether designed for specific subjects or for specific grades, are counted as classrooms.

Purpose-built "non-instructional" space, such as administrative and counselling offices, staff rooms, storage rooms, utility rooms, gyms, libraries, cafeterias, and multi-purpose rooms, etc, are not considered when determining a school's capacity.

The Ministry establishes the [Area Standards](#) for schools, and the [School Act](#) establishes class size as described in Section 76.1 (as indicated below). This forms the foundation of school capacity calculations.

Kindergarten:	22 students/classroom
Grades 1 to 3:	24 students/classroom
Grades 4 to 12:	30 students/classroom

If community space was part of the initial scope of a school when built, it may be exempt from the requirement to be available for future instructional space.

If school districts wish the Ministry to consider changes to school capacity, they must submit a request, in writing, including original plan drawings, amended plan drawings showing proposed changes, outline the rationale for the change and demonstrating that the space is not and will not be required within the school or family of schools for the next 10 years. For most areas, a forecast of 10 years is the standard for anticipating growth and should be included when assessing utilization.

SMP, EXP and REP projects will not be eligible for capital funding consideration if adequate space is available at nearby schools to accommodate its current student enrollment, as well as forecast student enrollment growth; thus eliminating the need for capital investment.

SMP and REP projects will be eligible for capital funding consideration providing the PDR demonstrates the school district has taken steps to optimize space within the school district and / or family of schools within reasonable proximity to the school requiring capital funding, even if the current and forecast utilization is below the guideline.

EXP projects may be eligible for capital funding consideration providing the PDR demonstrates the school district has taken steps to optimize space within the school district and / or family of schools within reasonable proximity to the school requiring capital funding, and the school is located within an area of rapid enrollment growth with enrollment increases over the previous five consecutive years and the next 10 years.

Each capital program will have evaluation criteria specific to the program objectives outlined in the following sections.

## **PART II: CAPITAL FUNDING PROGRAMS**

**The information outlined in Part II: Capital Funding Programs must be read in concert with the information provided within Part I.**

### **1 Seismic Mitigation Program (SMP)**

#### **1.1 SMP Background**

In 2005, the Ministry implemented the SMP and undertook risk assessments for all schools built prior to 1992 within identified high risk zones within BC (after which seismic strengthening became part of Building Code requirements).

More than 870 schools within 37 school districts have been assessed since the launch for the program with 342 schools identified as high risk. More information can be found at <https://www2.qa.gov.bc.ca/gov/content/education-training/administration/resource-management/capital-planning/seismic-mitigation-program>.

The Ministry engages seismic experts through the Association of Professional Engineers and Geoscientists of BC (APEGBC) in assessing the seismic risk of schools.

All seismic assessments or re-assessments of schools must be pre-approved in writing by the Ministry, for future consideration within the Ministry's SMP. Should the Ministry approve the seismic assessment or re-assessment; the school district can then proceed to complete a Seismic Project Identification Report (SPIR).

APEGBC has provided a guideline document (see Appendix E: Summary of SPIR Guidelines) that also includes fee structures for structural engineers engaged to complete SPIRs. Should the Ministry approve seismic assessment or re-assessment of schools, the school district is required to incur the costs of project development until such time as a Capital Project Funding Agreement is in place. All project development costs will be covered by the project budget upon execution of the Capital Project Funding Agreement.

SPIRs define the preliminary scoping and costing work required to define the seismic structural deficiencies and to aide capital planning and cost estimating. School districts are responsible to fund both the preliminary and detailed project development work required to advance projects for funding decision. However, these costs can be recovered from the project budget once the project is approved and a Capital Project Funding Agreement is in place. Additionally, school districts can utilize funds within their restricted capital account to fund project development activities, but only with prior written approval from the Ministry.

SMP projects will not be eligible for capital funding consideration if adequate space is available at nearby schools to accommodate its current student enrollment, as well as forecast student enrollment growth; thus eliminating the need for capital investment.

SMP projects will be eligible for capital funding consideration providing the PDR demonstrates the school district has taken steps to optimize space within the school district and / or family of schools within reasonable proximity to the school requiring capital funding, even if the current and forecast utilization is below the guideline.

The Ministry has allocated funds within the Ten-Year Capital Plan to mitigate all high seismic risk schools and will identify priorities for investment annually.

All high seismic risk schools will be mitigated be either, replacing, strengthening or closing the school (or a combination thereof) in accordance with the *Seismic Retrofit Guidelines*.

The seismic rating criteria 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 required. Buildings to be upgraded or replaced within the Capital Plan when it has reached the end of its useful life.

**Low** - Least vulnerable structure. Would experience isolated damage and would probably be repairable after an event. Non-structural upgrades may be required.

As of April 2016, the following numbers represent the number of high-risk schools and progress of the SMP:

<b>SMP Status</b>	
Completed schools	153
Under construction	14
Proceeding to construction	10
Remaining to be mitigated	165
<b><i>Overall Total SMP Projects</i></b>	<b><i>342</i></b>

## 1.2 SMP Prioritization

Priority for funding of seismic projects includes consideration of the level of risk with the funding of H1 and H2 risks receiving the highest priority. However, H3 schools may be prioritized for funding based on unique characteristics, such as being the only school serving a community or where the mitigation is a low cost that can be accomplished should funding become available with a short delivery timeline.

When selecting priorities for SMP funding, the school district shall consider the following:

- The risk rating of the School is H1, H2 or H3 in unique circumstances
- That the LRFPP demonstrates the school district is working towards optimizing available space
- Space within the school district and / or family of schools is optimized within reasonable proximity to the school requiring mitigation by considering operational changes or consolidation to justify the need for mitigation
- Utilization of current enrollment and forecast growth over the next 10 years is analyzed and determined the optimal size and configuration of the school. This information is integrated into the mitigation options
- Priorities are identified that will do the greatest good for the greatest number of students
- Previous recent projects have been delivered within the scope, schedule and budget
- The school district has the resources to successfully deliver the project
- The school district has submitted a SPIR or PRFS required to support the selection of the project as a provincial priority

The Ministry will inform school districts of supported seismic project(s) through the Capital Plan Response Letter. Once seismic projects receive support, school districts must develop a PDR that includes options and costing analysis to determine the least cost option for mitigating the seismic risk. Options should include:

1. Consolidation (if not previously eliminated as an option)
2. Strengthening
3. Strengthening and partial replacement
4. Replacement

When determining the “least cost option” the value of ongoing maintenance over the life of the asset (40 years) should be considered.

Where the preferred option of the school district is not the least cost option, the Ministry may consider other options providing the school district provides the funding required over and above the least cost option and the Ministry determines it is a reasonable capital expenditure.

### **1.3 SMP Submission Requirements**

- Review the Ministry's selection priorities for this section of the Capital Plan Instructions
- Review Part I of the Capital Plan Instructions
- Review and update the District's SMP projects submitted in the 2015/16 Five-Year Capital Plan submission as provided in the Five-Year Capital Plan Summary Spreadsheet. The spreadsheet must be filled out completely as per the instructions provided
- Submit a PRFS for the school district's high-priority SMP projects for Ministry capital funding consideration
- SMP projects that have been previously supported and not yet approved with a signed Capital Project Funding Agreement must be included in the Five-Year Capital Plan Summary Spreadsheet and ranked as a high-priority

## **2 Expansions (EXP) – New School, Addition and Site Acquisition**

The Ministry's priority for expanding school space is to areas experiencing consistent and rapid, high density population growth due to economic development and where space optimization has been demonstrated.

The Ministry requires all capital funding requests for space expansions to be supported by:

- a cost-benefit analysis based on the selection of the “least cost option” over the life of the school
- current LRFP that demonstrates the school district is working towards achieving optimal space utilization
- a verification that enrollment has increased in the area over the previous five consecutive years and the next 10 years
- a commitment up to 50% cost share by the school district based on available capital funding

Optimal space utilization varies between large urban districts and small rural districts due to practical realities of population distribution, density, travel distances and weather extremes. Additionally, an approach to optimizing space utilization varies between school districts due to declining enrollment, stable enrollment, increasing enrollment or shifting enrollment within the school district. For most areas, a forecast of 10 years is the standard for anticipating growth and should be included when assessing utilization. As such, the Ministry will assess what is practical and achievable on a project specific basis as part of the PIR/PRFS and PDR.

EXP projects will not be eligible for capital funding consideration if adequate space is available at nearby schools to accommodate its current student enrollment, as well as forecast student enrollment growth; thus eliminating the need for capital investment.

EXP projects may be eligible for capital funding consideration providing the PDR demonstrates the school district has taken steps to optimize space within the school district and / or family of schools within reasonable proximity to the school requiring capital funding, and the school is located within an area of rapid enrollment growth with enrollment increases over the previous five consecutive years and the next 10 years.

School districts are responsible to fund both the preliminary and detailed project development work required to advance projects for funding decision. However, these costs can be recovered from the project budget once the project is approved and a Capital Project Funding Agreement is in place. Additionally, school districts can utilize funds within their restricted capital account to fund project development activities, but only with prior written approval from the Ministry.

## **2.1 Site Acquisition**

Capital requests for site acquisitions require the same provision of supporting information as requests for space expansions and the school district must have School Site Acquisition Charges (SSAC) in place before the Ministry will support a site request.

Once SSAC have been established in a school district, updated ten-year enrollment projections will inform the school district's annual consultations with its local government regarding the need for new school sites and the calculated values of the per-unit SSAC. For further information, please refer to the Implementation Guide: School Site Acquisition Charge on the Ministry's Capital Planning Resources webpage at:

<http://www2.gov.bc.ca/assets/gov/education/administration/resource-management/capital-planning/ssacguide.pdf>

## **2.2 EXP Submission Requirements**

- review and update the District's expansions – new school, addition and site acquisition projects submitted in the 2015/16 Five-Year Capital Plan submission as provided in the Five-Year Capital Plan Summary Spreadsheet. The spreadsheet must be filled out completely as per the instructions provided
- submit a PRFS for the school district's high-priority EXP projects for the project to be considered for funding
- provide a summary of available capital balances and indicate the estimated value of funding contribution from the school district as a part of the PRFS (see Appendix F: Project Request Fact Sheet)
- EXP projects that have been previously supported and not yet approved with a signed Capital Project Funding Agreement must be included in the Five-Year Capital Plan Summary Spreadsheet and ranked as a high-priority

### **3 School Replacement (REP)**

Investing in our existing schools to ensure they are safe, well-functioning and lasting is a priority for the Ministry's Ten-Year Capital Plan. Ensuring the cost effective operation throughout the life-cycle of the school is a best practice in asset management across the globe. Well maintained schools can last for many generations and provide excellent learning environments for students, as well as create a sense of local history.

Where schools have reached the end of their useful life and further investment is not substantiated due to major structural issues or the accumulation of maintenance needs that would exceed the cost of replacement, the Ministry will consider submission for school replacement. School replacements are eligible for cost-sharing based on the school districts' assessed ability to contribute.

REP projects will not be eligible for capital funding consideration if adequate space is available at nearby schools to accommodate its current student enrollment, as well as forecast student enrollment growth; thus eliminating the need for capital investment.

REP projects will be eligible for capital funding consideration providing the PDR demonstrates the school district has taken steps to optimize space within the school district and / or family of schools within reasonable proximity to the school requiring capital funding, even if the current and forecast utilization is below the guideline.

School districts are responsible to fund both the preliminary and detailed project development work required to advance projects for funding decision. However, these costs can be recovered from the project budget once the project is approved and a Capital Project Funding Agreement is in place. Additionally, school districts can utilize funds within their restricted capital account to fund project development activities, but only with prior written approval from the Ministry.

As such, the Ministry expects school districts to make the best use of available AFG funding to maintain and prolong the life of the schools. Additionally, the Ministry's funding priority is on school maintenance programs such as BEP, SEP, and CNCP. Where schools are in need of substantial repair that will result in extending the life of the school, they may qualify and apply for funding under the SEP.

When selecting priorities for REP funding, the school district shall consider the following:

- an analysis of major structural deficiencies and / or the cost of addressing the maintenance requirements exceeds the cost of school replacement
- that the LRFP demonstrates the school district is working towards optimizing available space
- space within the school district and / or family of schools is optimized within reasonable proximity to the school requiring mitigation by considering operational changes or consolidation to justify the need for mitigation

- utilization of current enrollment and forecast growth over the next 10 years is analyzed and determined the optimal size and configuration of the school
- priorities are identified that will do the greatest good for the greatest number of students
- previous recent projects have been delivered within the scope, schedule and budget
- the school district has the resources to successfully deliver the project
- the school district has submitted the PIR or PRFS required to support the selection of the project as a provincial priority
- the school district has committed up to 50% cost share by the school district based on available capital funding

### **3.1 REP Submission Requirements**

- review and update the school district's REP projects submitted in the 2015/16 Five-Year Capital Plan submission as provided in the Five-Year Capital Plan Summary Spreadsheet. The spreadsheet must be filled out completely as per the instructions provided
- submit a PRFS for the school district's high-priority REP projects for it to be considered for funding
- provide a summary of available capital balances and indicate the estimated value of funding contribution from the school district as a part of the PRFS (see Appendix F: Project Request Fact Sheet)
- replacement projects that have been previously supported and not yet approved with a signed Capital Project Funding Agreement must be included in the Five-year Capital Plan Summary Spreadsheet and ranked as a high-priority

## **4 Building Envelope Program (BEP)**

School districts have been provided with a list of their currently identified and prioritized BEP projects. These projects should be reviewed within the context of the LRFPP.

School facilities that are eligible for funding under the BEP are facilities that are built between the year of 1980 and 2000 and also have a risk assessment report that was facilitated by BC Housing.

The Ministry will use BC Housing ranking of BEP projects as a guide to plan for funding future BEP projects. However, school districts must work with their Ministry Planning Officer to confirm or amend the priority order, based on the planned utilization of the individual school facilities and alignment with other upgrade work that may be completed in conjunction with the BEP remediation work (i.e. seismic upgrade project). Individual BEP projects may then be submitted as part of the annual Five-Year Capital Plan submission.

BEP funding may be prioritized for rural communities with limited availability of funding, where continuity of school operations is critical to the community's overall viability.

When selecting priorities for BEP funding, the school district shall consider the following:

- where the school is identified in BC Housing's prioritization
- coordination with other capital program needs for the schools, such as SMP
- the LRFPP demonstrates the school district is working towards optimizing available space
- space within the school district and / or family of schools is optimized within reasonable proximity to the school requiring mitigation by considering operational changes or consolidation to justify the need for mitigation
- utilization of current enrollment and forecast growth over the next 10 years is analyzed and determined the optimal size and configuration of the school. This information is integrated into the mitigation options
- priorities are identified that will do the greatest good for the greatest number of students
- previous recent projects have been delivered within the scope, schedule and budget
- the school district has the resources to successfully deliver the project

BEP projects are exempt from cost sharing provided the least cost option is implemented.

#### **4.1 BEP Submission Requirements**

- review and update the school district's BEP projects submitted in the 2015/16 Five-Year Capital Plan submission as provided in the Five-Year Capital Plan Summary Spreadsheet. The spreadsheet must be filled out completely as per the instructions provided
- PRFS is not required
- BEP projects that have been previously supported must be included in the Five-Year Capital Plan Summary Spreadsheet and ranked as a high-priority

## 5 School Enhancement Program (SEP)

SEP projects are investments that will contribute to the safety and function of the school and will extend the life of the existing asset.

### 5.1 SEP Funding Criteria

SEP projects that are eligible for funding are the following;

- Electrical upgrades (power supply and distribution systems)
- Energy upgrades
- Health and safety upgrades (fire systems, indoor air quality)
- Mechanical upgrades (heating, ventilation, plumbing)
- Roofing upgrades

Eligible projects must be more than \$100,000 but not exceed \$3,000,000.

SEP funding may be prioritized for rural communities with limited availability of funding, where continuity of school operations is critical to the community's overall viability.

Any project estimated at less than \$100,000 should not be included in the annual Five-Year Capital Plan submission. These projects may be funded from the AFG, where the projects are for the purpose of maintaining the service-life of an existing building.

SEP projects must meet Generally Accepted Accounting Principles (GAAP) for capital improvements. Projects not currently eligible for SEP funding include, but are not limited to;

- day to day wear and tear
- painting
- flooring
- parking
- driveway repairs
- playfield repairs

The Ministry will review SEP project submissions and priority will be given to projects with the greatest opportunity to improve safety and maintain the service-life of an existing facility.

Consideration will also be given to whether the project proposals:

- address issues affecting safety or the effective functioning of the school
- are in schools with identified long-term utilization
- are in schools with unique significant importance to the school district such as

those in rural areas with limited alternatives

- where the benefits over the costs of the improvements are positive over the appropriate time horizon for the investment

## **5.2 SEP Submission Requirements**

- all SEP project requests must be submitted using the Five-Year Capital Plan Summary Spreadsheet. The spreadsheet must be filled out completely as per the instructions provided
- submit a maximum of five (5) projects that the district is requesting funding for the 2017/18 fiscal year
- PRFS is not required
- projects submitted must be completed by March 31<sup>st</sup>, 2018
- SEP projects that have been supported to receiving capital funding must not be included in the Five-Year Capital Plan Summary Spreadsheet

## **6 Carbon Neutral Capital Program (CNCP)**

The CNCP is a \$5 million/year program up to 2018/19 that is available to provide specific funding to energy-efficiency projects that lower the school districts carbon emissions.

### **6.1 CNCP 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 VFA 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 as well as funding received so far.

CNCP funding may be prioritized for rural communities with limited availability of funding, where continuity of school operations is critical to the community's overall viability.

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

- the measurable emissions reductions and operational cost savings
- coordination with other capital program needs for the schools, such as SMP
- that the LRFP demonstrates the school district is working towards optimizing available space
- priorities are identified that will do the greatest good for the greatest number of students
- previous recent projects have been delivered within the scope, schedule and budget
- the school district has the resources to successfully deliver the project

### **6.2 CNCP Submission Requirements**

- all project proposals must be submitted using the Five-Year Capital Plan Summary Spreadsheet. The spreadsheet must be filled out completely as per the instructions provided
- submit supporting reports in PDF format (VFA Report and Engineering Reports)
- submit up to 3 (three) individual project proposals. 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
- projects submitted must be completed by March 31<sup>st</sup>, 2018
- CNCP projects that have been supported to receiving capital funding must not be included in the Five-Year Capital Plan Summary Spreadsheet

## **7 Bus Replacement Program (BUS)**

School buses are considered capital assets and any new or replacement buses are funded as part of the school district's annual Five-Year Capital Plan submission.

### **7.1 Bus Funding Criteria**

Bus funding requests that will be eligible funding will consider the following;

- school bus age and/or mileage
- existing buses with safety and mechanical issues
- new school buses to support new routes due to increased district enrollments that are without current service

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

- type A2 mini-buses (20-29 passengers), which are more than 10 years old and/or have more than 250,000 km
- type C conventional buses (34-76 passengers), which are more than 12 years old and/or have more than 325,000 km
- type D-RE & Type D-FE (80+ passengers), which are more than 15 years old and/or have more than 400,000 km
- none of the above applies, but the need for replacement can be substantiated

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.

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

### **7.2 Bus Inventory**

To assist in planning and forecasting of bus replacements throughout the province, school districts shall provide their inventory in the Five-Year Capital Summary Spreadsheet. The Ministry will use this information as a guide in updating the Ten-Year Capital Plan for the province.

### 7.3 Bus Submission Requirements

- submit school bus funding requests for the 2017/18 fiscal year
- submit the school district's bus inventory using the Five-Year Capital Plan Summary Spreadsheet
- all school bus funding requests must be submitted using the Five-Year Capital Plan Summary Spreadsheet
- for replacement due to safety and mechanical issues, submit the following documents:
  - detailed description of the safety and or mechanical issues
  - the latest Ministry of Transportation and Infrastructure inspection report verifying the bus unit number, age, condition and number of kilometres
- for additional buses for new routes or trips, submit the following documents:
  - rationale for the request that demonstrates the increase ridership and may include;
    - copies of route sheets and route maps
- for replacement of existing buses, submit the following documents:
  - the latest Ministry of Transportation and Infrastructure inspection report verifying the bus unit number, age, condition and number of kilometres
  - if bus replacement is earlier than provided in Ministry guidelines, the reasons for early replacement and recent maintenance costs records are required
  - where the capacity of a replacement bus is to be increased, the rationale for the request must be provided
- PRFS is not required
- bus purchases must be completed with goods received by March 31<sup>st</sup>, 2018
- buses that have been supported to receiving capital funding must not be included in the Five-Year Capital Plan Summary Spreadsheet

## PART III: FIVE-YEAR CAPITAL PLAN SUBMISSION REQUIREMENTS SUMMARY

### 1 Capital Plan Submission Forms

In this submission, the Ministry will have a combination of online forms, Excel and Word documents to assist school districts with their capital plan development and submission.

The online forms are available on the web-based Remote Data Entry Capital Planning (RDECP) system. RDECP can be accessed by designated users at:

[http://rdecg.educ.gov.bc.ca/pls/rdecg/rde\\_html\\_main\\_pk.rdecg](http://rdecg.educ.gov.bc.ca/pls/rdecg/rde_html_main_pk.rdecg)

The following requirements for each form are required to complete the school district's annual Five-Year Capital Plan submission.

Source	Form	Requirements	Submission Type
RDECP	CP1 Project Budgets	This form is a tool school districts may use to assist them in developing projects budgets which can be used to supplement information in the PRFS	Not applicable
RDECP	CP2 Capital Plan Project Summary	NEW: CP2 form is <b>not</b> required to be submitted. The Five-Year Capital Plan Summary Spreadsheet will take its place for all the project requests	Not applicable
RDECP	CP3 Enrollment and Forecast	As the information is fairly recent, the ten-year enrollment projections for the province are using the projections in the 2015/16 Capital Plan Instructions. The enrollment for 2015/16 has been updated to show the actuals in the form.  School districts are to review and update as required their enrollment projections on an individual school basis for kindergarten, elementary and secondary students. As required, provide the up-to-date information in the PRFS for the school district's high-priority projects.	Not applicable

Source	Form	Requirements	Submission Type
RDECP	CP4 Neighbouring Schools Analysis	This form is to assist in identifying all the neighbouring schools that are potentially affected by the proposed project and calculates the space ranking for that project. Information gathered in this form can be used to assist in providing the required information in the PRFS.	Not applicable
Consultant Reports	PIR	Previously developed PIRs or PIR Light for priority projects, submit an updated version to address changes in the project budgets and enrollment/utilization forecasts.  NEW: PIR or PIR Light is <b>not</b> required to be developed for new priority projects.	Email PDF or Word Format
Word File	PRFS	PRFS are only applicable to the following projects: <ul style="list-style-type: none"> <li>• New Schools</li> <li>• Seismic Upgrade/Replacement/Partials</li> <li>• Additions</li> <li>• Replacement</li> </ul> School districts may submit up to 10 PRFS. School districts can collaboratively work with their Ministry Planning Officer to determine which priority projects should have a PRFS and the amount of PRFS to be developed.	Email PDF Format
Five-Year Capital Plan Summary Spreadsheet	SMP Projects Excel Tab	<ul style="list-style-type: none"> <li>• Review the Ministry's selection priorities for this section of the Capital Plan Instructions</li> <li>• Review Part I of the Capital Plan Instructions</li> <li>• Review and update the District's SMP projects submitted in the 2015/16 Five-Year Capital Plan submission as provided in the Five-Year Capital Plan Summary Spreadsheet. The spreadsheet must</li> </ul>	Email Excel File

Source	Form	Requirements	Submission Type
		<p>be filled out completely as per the instructions provided</p> <ul style="list-style-type: none"> <li>• Submit a PRFS for the school district’s high-priority SMP projects for Ministry capital funding consideration</li> <li>• SMP projects that have been previously supported and not yet approved with a signed Capital Project Funding Agreement must be included in the Five-Year Capital Plan Summary Spreadsheet and ranked as a high-priority</li> </ul>	
Five-Year Capital Plan Summary Spreadsheet	EXP Projects Excel Tab	<ul style="list-style-type: none"> <li>• review and update the District’s expansions – new school, addition and site acquisition projects submitted in the 2015/16 Five-Year Capital Plan submission as provided in the Five-Year Capital Plan Summary Spreadsheet. The spreadsheet must be filled out completely as per the instructions provided</li> <li>• submit a PRFS for the school district’s high-priority EXP projects for the project to be considered for funding</li> <li>• provide a summary of available capital balances and indicate the estimated value of funding contribution from the school district as a part of the PRFS (see Appendix F: Project Request Fact Sheet)</li> <li>• EXP projects that have been previously supported and not yet approved with a signed Capital Project Funding Agreement must be included in the Five-Year Capital Plan Summary Spreadsheet and ranked as a high-priority</li> </ul>	Email Excel File
Five-Year Capital Plan Summary	REP Projects Excel Tab	<ul style="list-style-type: none"> <li>• review and update the school district’s REP projects submitted in the 2015/16 Five-Year Capital Plan submission as provided in the</li> </ul>	Email Excel File

Source	Form	Requirements	Submission Type
Spreadsheet		<p>Five-Year Capital Plan Summary Spreadsheet. The spreadsheet must be filled out completely as per the instructions provided</p> <ul style="list-style-type: none"> <li>• submit a PRFS for the school district’s high-priority REP projects for it to be considered for funding</li> <li>• provide a summary of available capital balances and indicate the estimated value of funding contribution from the school district as a part of the PRFS (see Appendix F: Project Request Fact Sheet)</li> <li>• replacement projects that have been previously supported and not yet approved with a signed Capital Project Funding Agreement must be included in the Five-year Capital Plan Summary Spreadsheet and ranked as a high-priority</li> </ul>	
Five-Year Capital Plan Summary Spreadsheet	BEP Projects Excel Tab	<ul style="list-style-type: none"> <li>• review and update the school district’s BEP projects submitted in the 2015/16 Five-Year Capital Plan submission as provided in the Five-Year Capital Plan Summary Spreadsheet. The spreadsheet must be filled out completely as per the instructions provided</li> <li>• PRFS is not required</li> <li>• BEP projects that have been previously supported must be included in the Five-Year Capital Plan Summary Spreadsheet and ranked as a high-priority</li> </ul>	Email Excel File
Five-Year Capital Plan Summary Spreadsheet	SEP Projects Excel Tab	<ul style="list-style-type: none"> <li>• all SEP project requests must be submitted using the Five-Year Capital Plan Summary Spreadsheet. The spreadsheet must be filled out completely as per the instructions provided</li> <li>• submit a maximum of five (5) projects that the district is requesting funding for the 2017/18</li> </ul>	Email Excel File

Source	Form	Requirements	Submission Type
		fiscal year <ul style="list-style-type: none"> <li>• PRFS is not required</li> <li>• projects submitted must be completed by March 31st, 2018</li> <li>• SEP projects that have been supported to receiving capital funding must not be included in the Five-Year Capital Plan Summary Spreadsheet</li> </ul>	
Five-Year Capital Plan Summary Spreadsheet	CNCP Projects Excel Tab	<ul style="list-style-type: none"> <li>• all project proposals must be submitted using the Five-Year Capital Plan Summary Spreadsheet. The spreadsheet must be filled out completely as per the instructions provided</li> <li>• submit supporting reports in PDF format (VFA Report and Engineering Reports)</li> <li>• submit up to 3 (three) individual project proposals. 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</li> <li>• projects submitted must be completed by March 31st, 2018</li> <li>• CNCP projects that have been supported to receiving capital funding must not be included in the Five-Year Capital Plan Summary Spreadsheet</li> </ul>	Email Excel File
Five-Year Capital Plan Summary Spreadsheet	BUS Excel Tab	<ul style="list-style-type: none"> <li>• submit school bus funding requests for the 2017/18 fiscal year</li> <li>• submit the school district's bus inventory using the Five-Year Capital Plan Summary Spreadsheet</li> <li>• all school bus funding requests must be submitted using the Five-Year Capital Plan Summary Spreadsheet</li> <li>• for replacement due to safety and mechanical issues, submit the following documents:</li> </ul>	Email Excel File

Source	Form	Requirements	Submission Type
		<ul style="list-style-type: none"> <li>○ detailed description of the safety and or mechanical issues</li> <li>○ the latest Ministry of Transportation and Infrastructure inspection report verifying the bus unit number, age, condition and number of kilometres</li> <li>● for additional buses for new routes or trips, submit the following documents:               <ul style="list-style-type: none"> <li>○ rationale for the request that demonstrates the increase ridership and may include;</li> <li>○ copies of route sheets and route maps</li> </ul> </li> <li>● for replacement of existing buses, submit the following documents:               <ul style="list-style-type: none"> <li>○ the latest Ministry of Transportation and Infrastructure inspection report verifying the bus unit number, age, condition and number of kilometres</li> <li>○ if bus replacement is earlier than provided in Ministry guidelines, the reasons for early replacement and recent maintenance costs records are required</li> <li>○ where the capacity of a replacement bus is to be increased, the rationale for the request must be provided</li> </ul> </li> <li>● PRFS is <u>not</u> required</li> <li>● bus purchases must be completed with goods received by March 31<sup>st</sup>, 2018</li> <li>● buses that have been supported to receiving capital funding must <u>not</u> be included in the Five-Year Capital Plan Summary Spreadsheet</li> </ul>	

<b>Source</b>	<b>Form</b>	<b>Requirements</b>	<b>Submission Type</b>
Board Of Education	Appendix D: Board Of Education Capital Plan Resolution Sample	<ul style="list-style-type: none"><li>• Submit the Board's Capital Plan Resolution</li></ul>	Electronic copy

## **2 Five-Year Capital Plan Development Tools and Resources**

### **2.1 Project Budgets**

#### **(a) Area Standards**

Published Ministry of Education Area Standards (05/2012) are incorporated into the CP-1 Project Request Forms. Two versions of the CP-1 Form (Elementary; Middle and Secondary) are linked to space standard tables according to the specified facility type. Space requests are entered in the design aid sheets, which are linked to the tables for elementary, middle or secondary schools.

<http://www2.gov.bc.ca/assets/gov/education/administration/resource-management/capital-planning/areastandards.pdf>

#### **(b) Allowances, Rates and Costing Factors**

All factors associated with the development of capital budgets as published in the 2015/16 Capital Plan Allowances, Rates and Costing Factors Supplement are incorporated into the CP-1 Project Request Form.

[http://www2.gov.bc.ca/assets/gov/education/administration/resource-management/capital-planning/current-resources/2015-16\\_cpi\\_supplement.pdf](http://www2.gov.bc.ca/assets/gov/education/administration/resource-management/capital-planning/current-resources/2015-16_cpi_supplement.pdf)

More detailed information on the Allowances, Rates and Costing Factors is available in the Capital Plan Appendices.

These values will be updated, where necessary, to calculate the total project budget prior to the signing of a Capital Project Funding Agreement.

### **2.2 Enrollment, Forecasts and Neighbouring Schools Analysis**

#### **(a) Enrollment and Forecast: RDECP – CP3 Form**

The Ministry prepares ten-year enrollment projections for the province and for each school district based on population trends identified by BC Stats. School inventories and school district projections are reported in the CP-3 School District Summary of Capacities and Projected Enrollment Form. As the information is fairly recent, the ten-year enrollment projections for the province is using the projections used in 2015/16 Capital Plan Instructions. Review and update the school districts ten-year enrollment projections on an individual school basis for kindergarten, elementary and secondary students.

**(b) Neighbouring Schools Analysis: RDECP – CP4 Form**

This form is to assist in identifying all the neighbouring schools that is potentially affected by the proposed project and calculates the space ranking for that project. Information gathered in this form can be used to assist in providing the required information in the PRFS.

## PART IV: 2016/17 CAPITAL PLAN TIMELINES

<b>2016/17 Capital Plan Timelines</b>	
<b>June 2016</b>	<ul style="list-style-type: none"><li>• 2016/17 Capital Plan Instructions available on the Ministry's <a href="#">Capital Planning Resources webpage</a></li></ul>
<b>June – August 2016</b>	<ul style="list-style-type: none"><li>• School districts to work with their Ministry Planning Officers in updating their capital projects and preparing new PRFS for the 2016/17 Capital Plan submission</li></ul>
<b>September 30th, 2016</b>	<ul style="list-style-type: none"><li>• Due date for Boards of Education to submit 2016/17 Capital Plan to the Ministry, to include:<ul style="list-style-type: none"><li>• Five-Year Capital Plan Summary Spreadsheet</li><li>• PRFS</li><li>• Board of Education resolution adopting the 2016/17 capital plan submission</li></ul></li></ul>
<b>October 2016– February 2017</b>	<ul style="list-style-type: none"><li>• Ministry reviews all submissions and applies provincial ranking criteria to requested capital projects</li></ul>
<b>March – April 2017</b>	<ul style="list-style-type: none"><li>• Ministry reviews and approves recommended project list</li><li>• Ministry issues Capital Plan Response Letters</li></ul>



**2016/17**  
**Capital Plan**

**APPENDICES**

Capital Division  
September 2016

## **APPENDIX A: PROJECT BUDGET ESTIMATE**

A detailed project budget estimate must be submitted as part of the PIR or PRFS.

### **Ministry Area Standards**

Ministry area standards are published in the Ministry of Education - Area Standards (05/2012), available on the Ministry's Capital Planning Resources webpage at:

<http://www2.gov.bc.ca/assets/gov/education/administration/resource-management/capital-planning/areastandards.pdf>

Space allowances apply to all capital plan projects regardless of the procurement process.

### **Allowances, Rates and Costing Factors**

Allowance, rate and costing factors associated with the development of capital budgets are published in the 2015/16 Capital Plan Allowances, Rates and Costing Factors Supplement. These will apply to all capital plan projects regardless of the procurement process.

<http://www2.gov.bc.ca/gov/content/education-training/administration/resource-management/capital-planning/current-resources>

These values will be adjusted, where necessary, to calculate the total project budget prior to the signing of a Capital Project Funding Agreement.

More detailed information on the Allowances, Rates and Costing Factors categories are listed below.

### **Ministry Base Budget Rates**

An estimated capital budget will be calculated for each school space project (i.e., new schools, additions, replacements) using Ministry Base Budget Rates regardless of the procurement process. Set unit rates do not apply to seismic mitigation projects; these must be considered for budgeting on an individual project basis.

### **Location Factors**

Costing factors for location have been developed for all school districts, with some allowances for variations within specific school districts. The Location Factor is based on a combination of two variables; geographic factor (location based) and economic factor (market based).

### **Development Cost Charges and Off-Site Service Charges**

School districts must comply with Government guidelines related to funding support for local government Development Cost Charges, off-site service charges, and bylaw requirements. For further details, please refer to the Capital Project Budget Guidelines for Local Government Service Charges and Bylaw Requirements (issued March 25, 2009) on the Ministry's Capital Planning Resources webpage at:

<http://www2.gov.bc.ca/assets/gov/education/administration/resource-management/capital-planning/budget-guidelines.pdf>

### **Site Development**

A Site Development Allowance has been developed for differently sized new buildings and additions. This allowance is intended to provide for the completion of items associated with the scale of development, with the exception of any additional costs associated with any abnormal site conditions.

### **Supplementary Building and Site Allowances**

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.

**Note:** The Base Budget Rate is used to provide a budget estimate of construction costs for a capital project assumes a level site with normal load bearing capacity; otherwise, an appropriate ground factor should be selected to reflect the abnormal site conditions within the building footprint.

Supplementary site and building costs are defined as those costs that are unavoidable, extraordinary, significant, site-specific costs, not accounted for and not affordable within the construction budget. The Supplementary Building and Site Allowances must be calculated separately to include items not covered under the Base Budget Rate Building budget and Site Development Allowance.

The construction budget is established using the Ministry Base Budget Rates, cost allowances and factors. Supplementary costs therefore cover only premium costs for extraordinary work that do not form part of the normal costs of building and are not covered under the Ministry's Base Budget Rates or allowances for site development (e.g., demolition, asbestos removal, site contamination, retention ponds required during construction, temporary accommodation).

One area of concern for "Supplementary Costs" is where costly design or servicing stipulations are being placed by third party entities, (e.g., local government, Work Safe BC). In such situations, it is important that the design team identify clearly the source of the expense, its value and the impact on the budget.

It is important that supplementary funding be considered a funding of "last resort", and not inappropriately used to increase a project's total budget. Where high cost supplementary issues are identified, different options should be reviewed by the design team.

### **Planning and Design Fees**

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

### **Contingency Planning and Allowances**

The use of contingency planning and allowances affords the design team a measure of flexibility within their budget and schedule to effectively manage project costs.

For other items, where the cost of a specific item of work cannot be determined within a reasonable level of confidence, an appropriate contingency may be assigned:

- a. For items of work covered by a fixed Ministry allowance, such as the approved Base Budget Rates or site development allowance, the estimated cost of the work plus the design contingency and any associated economic adjustment must remain within the Ministry allowance.
- b. For an item of work that meets the definition of a supplementary cost, a design contingency, up to a maximum of 10 percent of the estimated cost, may be included in the project budget.
- c. The Ministry contingency allowance of 3 percent for new space and 5 percent for seismic upgrades should be considered as construction contingencies and not used during design.

### **Equipment and Freight Rate Allowances**

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

### **Other**

All costs of the project not specifically provided for elsewhere in the Financial Summary Form are to be included in this section. In addition to the items listed and any other items particular to the project, an estimate of the costs expected for the completion of the PIR Project Development Report (PDR) should be included.

### **Identified Risks**

Provide cost estimates for all significant issues identified as risks potentially affecting project scope, cost or schedule.

## **APPENDIX B: CP-3 SCHOOL DISTRICT SUMMARY OF CAPACITY AND PROJECTED ENROLLMENT FORM**

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

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

The Ministry projection of school district enrollment is shown as district totals for Kindergarten, elementary (grades 1 – 7) and secondary (grades 8 – 12). Using the Ministry enrollment projections as a base, enrollment breakdowns by grade-type and school must be provided on the CP-3 School District Summary of Capacities and Projected Enrollment 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 enrollment trends, these projections may only be entered into its CP3 Form following discussion with the Ministry.

## **APPENDIX C: CP-4 SCHOOL CAPACITY AND ENROLLMENT WORKSHEET**

The CP-4 School Capacity and Enrollment Worksheet calculates the level of need, based on the operating capacities, current enrollments and projected enrollments of all schools in a particular geographic area of a school district.

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 enrollments are likely to be affected by the requested project. In urban areas, this catchment area is usually a three-kilometre radius for elementary schools and a five-kilometre 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 D: BOARD OF EDUCATION CAPITAL PLAN RESOLUTION SAMPLE**

For the Ministry to process a capital plan submission, a copy of the board of education’s resolution that adopts the 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 Education of School District No. \_\_\_\_ *(school district name)* approve the Capital Plan as outlined on the attached summary.

I hereby certify this to be a true copy of the resolution for approval of the Capital Plan adopted by the Board of Education, the \_\_\_\_\_ day of \_\_\_\_\_, 2015

*(Signature)*

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

## APPENDIX E: SUMMARY OF SPIR GUIDELINES

The Seismic Project Identification Report (SPIR) is a specifically formatted report that documents the seismic retrofit concepts proposed for a seismically deficient school block.

The Ministry requires that a school district submit a SPIR for any eligible block within a school as the first step in the District's request for seismic retrofit funding. APEGBC, as the Ministry's technical advisor for the Seismic Mitigation Program, was requested by the Ministry to develop the format and technical requirements for the SPIR.

SPIRs are due diligence documents designed to present seismic upgrading options to assist seismic safety planning by both the school district and the Ministry. The expectation is that SPIR information will guide the seismic upgrading of school blocks in a safe and cost-effective manner.

Selected general requirements for the preparation of an SPIR include the following:

- (a) **SPIR Funding:** A school district is required to initially fund the preparation of the SPIR. The Ministry will reimburse the school district through the Certificate of Approval mechanism after the project funding has been approved.
- (b) **Renewal:** The scope of the SPIR is to include only that work (structural, architectural, mechanical and electrical) to implement the seismic upgrade. Upgrade or renewal work is excluded if such work is not an essential part of the seismic upgrade.
- (c) **Prime Consultant:** The prime consultant for the preparation of the SPIR must be a structural engineer who has attended both the SPIR Guidelines workshop on April 20, 2012 and the Seismic Retrofit Guidelines 1st edition (SRG1) workshop on September 30, 2011.
- (d) **Construction Cost Estimate:** A qualified cost consultant must prepare a Class C construction cost estimate for the seismic upgrade (cost consultant report an appendix in SPIR).
- (e) **Multi-disciplinary SPIR Consulting Team:** The majority of SPIRs are anticipated to require nominal architectural, mechanical, electrical and geotechnical engineering services. The prime consultant must make a request to the Technical Review Board (TRB) for approval of additional funding for such services at the onset of the SPIR. The TRB will then recommend additional funding to the Ministry, as required.

For information on the consulting fee schedule please visit the following link:

[https://www.apeg.bc.ca/getmedia/7737fff2-b4c3-49ba-bb65-b7307fe73635/Seismic-Project-Identification-Report-\(SPIR\)-Guidelines-V2-2.pdf.aspx](https://www.apeg.bc.ca/getmedia/7737fff2-b4c3-49ba-bb65-b7307fe73635/Seismic-Project-Identification-Report-(SPIR)-Guidelines-V2-2.pdf.aspx)

For further information on the SPIR process please visit the following link:

<https://www.apeg.bc.ca/For-Members/Professional-Practice/School-Seismic-Upgrade-Program>

## **APPENDIX F: PROJECT REQUEST FACT SHEET**

To access the document, please visit the following link:

<http://www2.gov.bc.ca/assets/gov/education/administration/resource-management/capital-planning/current-resources/capital-plan-instructions-appendix-f.docx>

## **APPENDIX G: LONG RANGE FACILITIES PLAN GUIDELINES**

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## **PART I INTRODUCTION**

This *Guideline* is to be read in conjunction with the *Capital Plan Instruction 2016/17* published by the Ministry of Education.

The LRFP is a mechanism for school districts to effectively demonstrate that proper facility planning is taking place in support of the districts educational plan over a 10 year window. LRFPs are required to:

- ✓ Be developed, maintained and made available upon Ministry's request.
- ✓ Have the concurrence of the appropriate Ministry Planning Officer (MPO) prior to being approved by the Board.
- ✓ Be in planning, development or finalized upon receiving the Capital Plan Instruction 2016.

LRFPs will be prepared using district financial resources. LRFPs remain valid until they are changed and are not required to be revised or re-submitted annually. However, as part of their annual Capital Plan submission, the Board will be required to certify that no significant changes have occurred within the district that warrant a revision to the LRFP.

The LRFP is expected to be developed in accordance with all Regulations, Orders-In-Council, School Act Ministerial Orders as well as Ministry Policies, Instructions and Guidelines provided by the Ministry. The LRFP has no authority to amend the intent or direction provided above; for example, while the LRFP may identify a proposed school closure, the School Opening and Closure Order must be followed to implement the closure.

## PART II

# SCHOOL DISTRICT PLANNING

The fundamental premise of the LRFP is to provide a mechanism for districts to demonstrate they are managing their facilities in an effective, economic and efficient way in support of their educational goals. The LRFP places the need for capital projects in a district-wide context and becomes the basis for submission of capital project requests by the district and for investment decisions by the Ministry.

The LRFP will identify at least the following:

- ✓ the educational programs operating within the district
- ✓ future trends or anticipated new initiatives, including both those of the school district and the government
- ✓ the current district enrollment and forecast enrollment trends for 10 years
- ✓ potential reconfiguration of district programs
- ✓ the current capacity of all facilities, including temporary accommodation and/or rental facilities
- ✓ how maintenance of the district's permanent facilities will be carried out
- ✓ building condition of all of the district's facilities
- ✓ implementation of sustainability initiatives to meet the goals of the Province
- ✓ use of temporary accommodation including rental or leased space, and
- ✓ transportation of students

The government of BC has also supported appropriate alternative community uses on school sites and/or in school facilities. More details of this initiative are provided in Part III.

School districts are expected to make decisions on the optimum use of their facilities based on a district-wide perspective. However, in some districts there may be a necessity or advantage in evaluating facilities on a zone or geographic basis, based on the layout of the school district and/or the community it serves. Such statistical study areas are acceptable as long as they are clearly identified and the rationale for their allocation is provided.

Where school districts may not have internal expertise in planning, they should consider the retention of the appropriate external expertise and experience in making informed assessments about enrollment, capacity and utilization to supplement the district's ability to complete their LRFP.

There are some changes that are considered significant and these changes will require formal revision to a district's LRFP. Examples are:

- ✓ any significant changes in educational programs, either initiated by the district or by government
- ✓ enrollment projections that exceed 10% (either increase or decrease) over the 10 year window of the LRFP

- ✓ proposed reconfiguration of schools
- ✓ a change in the availability status of any facility used for K-12 education, and/or
- ✓ other events that potentially affect investment decisions in the district's facilities.

Any revision of a district's LRFP must be discussed with the appropriate Ministry Planning Officer for concurrence before being approved by the Board. In developing the LRFP, at a minimum, the MPO must be consulted as the following are identified:

- ✓ Capacities of individual schools
- ✓ Establishment of statistical study areas
- ✓ 10 year enrollment forecast
- ✓ Final draft LRFP prior to submission to the Board for approval

In the development of the LRFP, districts are expected to work with local and other related jurisdictions and to consult with each other on future development, school enrollment, school site requirements, locations, etc. The planning inherent in the LRFP will also provide the framework and data necessary for the establishment of a School Site Acquisition Charge (SSAC). This will permit the submission of a stand-alone capital project request for site acquisition.

## **PART III**

# **REQUIREMENTS FOR LONG-RANGE FACILITIES PLAN**

### **1. BACKGROUND**

The LRFP is not simply identification for needed capital projects but rather it is a comprehensive plan outlining how the district will manage its school facilities in order to deliver its educational programs at the highest possible standard. This requires a two step approach:

1. examining how to best utilize the current operational and maintenance resources of the district to best maintain its facilities, and
2. identifying the capital project requirements at the end of a facilities life or to meet changing needs.

The effective, efficient and economic use of a district's facilities may also impact the transportation of students where facilities are not located within acceptable walking distances.

The Ministry continues to seek funding from government both for operational grants to districts as well as new capital funding. However, for the foreseeable future, both school districts and the Ministry must exercise reasonable expectations of the overall investment in educational facilities by government. Toward this end, it is important for school districts to ensure that the LRFP is capable of sustainable delivery of the best possible facilities to meet the districts educational programs.

### **2. REQUIREMENTS**

The following are the minimum requirements to be included in the LRFP:

#### **a. Educational Considerations**

Housing students and staff for the delivery of high quality educational programs is the reason a school district has facilities. Therefore a review of the programs offered in a district is critical to understanding the need for facilities. In addition to the core curriculum for K-12, districts may have organized for other special programs i.e. Montessori, French Immersion, Aboriginal Education, special needs, district programs, etc., that impact on the location and use of the district's facilities.

In this section, an outline of the key educational programs is required to better understand the allocation and use of facilities.

School districts are also being encouraged to introduce more choices and greater flexibility in the education system. The mandatory establishment of catchment areas for each school will ensure

that students have priority to attend their neighborhood school, but will also enable school districts to create “specialty” schools that will serve the larger community.

It is recognized that many schools now provide space for important community functions. The allocation of these spaces within the school facility needs to be identified as part of the space use allocation since they potentially affect available space and overall school utilization. Any space utilization contained in classrooms such as childcare, district programs, etc should also be identified.

## **b. Existing Situation**

This section identifies the current situation at the time the LRFP is prepared and will be the “base case” for the school district. It includes the following:

- **Inventory of School District Facilities**

All district assets used for K-12 education must be identified. These include, but are not limited to the following:

- Elementary schools
- Middle schools
- Secondary schools
- Special purpose schools
- Leased or rented property used for K-12 school purposes
- Temporary classrooms (portables, etc)

In order to operate, the district may also have facilities that are not used for day-to-day K-12 purposes. These should also be included within the districts LRFP.

- Board offices
- administrative buildings
- maintenance facilities
- garage
- adult education centres
- vacant sites owned by the Board, and whether rented or leased to others
- closed schools that may or may not have an alternate use
- storage
- etc.

In many districts, facilities may have a combination of uses, including a mixture of K-12 education, district facilities and community uses. Where this is the case, it should be clearly identified in the LRFP.

- **Non-School Users within District Facilities**

The government of BC has also supported appropriate alternative community uses on school sites and/or in school facilities. Any other non-K-12 educational use on school property should be identified. Examples include childcare centres, recreation centres, education support programs, etc. The district may also share an operational or site management relationship with the external user.

The allocation of any space within the school facility in addition to the Ministry area standards need to be identified as part of the space use allocation.

- **Condition of Existing Facilities**

The information of the condition of all district facilities needs can be accessed through the Capital Asset Management System (VFA database). As the information from this database are based on a standard type facility audit, districts can undertake a more comprehensive facility audits if they feel it is necessary to properly identify the building condition. The LRFP does not require the district to conduct a more detailed Facility Audit.

A qualified and independent consultant must be used if a formal Facility Audit is undertaken. Before engaging such a consultant, the Ministry Planning Officer can confirm whether the preparation work for implementation of the Capital Asset Management System may be able to provide this service.

- **District or Community Geography**

School districts are expected to make decisions on facilities based on a district-wide perspective. However, in some districts there may be a necessity or advantage in evaluating facilities on a zone or geographic basis.

If districts currently utilize zones or have different conditions for different geographical areas, then the zone or geographic area should be clearly identified and the rationale for its allocation provided as part of the LRFP.

- **Capacity**

Capacity is defined as the operating capacity of each school, which is a function of the nominal capacity, grade configuration and class sizes. The district will identify the current capacity of each facility used for K-12 education. Concurrence by the Ministry Planning Officer is required once these have been identified in the LRFP.

- **Current Enrollment**

School districts will provide the current enrollment in the first year of the LRFP, both by district (or zone and/or geographical area as applicable) and by individual school.

- **Utilization**

With the identification of K-12 school facilities, capacity and enrollment, the utilization of individual schools can be calculated.

- **Transportation of Students**

Transportation of students is affected by the location, condition and educational use of the district's facilities. The district will identify where transportation of students is required and include an inventory of their transportation fleet in accordance with Schedule D.

The identification of the above factors will allow the district to develop the current situation as a "base case". Such a base case will be able to predict the operational and maintenance costs over the 10 year window of the LRFP. This "base case" can then be used for comparison with other potential options.

### **c. Enrollment Forecast**

Effective capital planning requires a long-term overview of enrollment in order to predict trends in the supply and demand for facilities, and to avoid potentially costly short-term solutions.

The Ministry provides a ten year projection of enrollment for all districts. Based on this, the district will provide an enrollment forecast for individual schools.

School districts may choose to develop their own ten-year projections based on local knowledge of future development, enrollment trends, future housing and student yield rates; however, in these cases the school district needs to document why their projections differ from the projections of the Ministry.

### **d. Challenges for the Future**

Any needed adjustments due to changing educational requirements, new programs, district initiatives and community impacts should be identified and the impact on the district's schools quantified. This includes changes both as a result of school district initiatives as well as that of government.

Other typical considerations in this section might include:

- the impact of heritage,
- post-disaster agreements and requirements,
- sustainability initiatives
- the need for additional temporary accommodations
- schools that are listed on the active Building Envelop Program (BEP) roster for future projects, and
- schools identified Seismic Mitigation Program along with their current seismic risk.

The future of B.C. schools is also changing with the government of BC supporting appropriate alternative community uses on school sites and/or in surplus school facilities. Typical examples are:

- Neighbourhoods of Learning. This project will see education and community services brought together in a single neighbourhood hub – one where schools and community organizations can create places where people can access educational and community services under one roof. Schools throughout the province will be able to adopt this model in the future to use extra space in schools to best meet the needs of their students and communities. All school districts are expected to move towards a more inclusive approach when planning the use of school space in the future.

For the purposes of the LRFP, districts shall identify purposely build (new schools built since the Neighbourhood of Learning initiative started where up to 15% of the total gross area was made available for Neighborhood Learning Centers (NLC)) and converted space (existing schools before the NLC initiative) of an individual school that is allocated to Neighborhoods of Learning initiatives such as early learning or child-care programs, office or meeting rooms for non-profit organizations, health clinics, sports programs, family resource or seniors' centres, industry training, or branch libraries.

- Strong Start Centres. Districts shall identify classrooms in their elementary schools to accommodate these centres over the window of the LRFP.
- Alternate Community Uses. School districts are to clearly identify any and all community partners who are located within schools or are anticipated to be located within schools.

As a result of shifting demographics and population patterns there are fewer students in the schools, leaving many of these valuable facilities under-utilized. As part of these assessments during development of the LRFP, districts may also need to review the allocation of existing space within their district. This may require the re-allocation of catchment area boundaries in order to ensure the optimization of available space.

**e. Impact on Utilization and Optimizing Available Space**

School districts must be able to demonstrate that they are using their existing school facilities efficiently, effectively and economically based on the broader context of capacity utilization at the district (sub-district) level.

The purpose of optimizing space utilization is to ensure sufficient space is available to students today and for enrollment forecasts over the next 10 years, while minimizing the costs of construction, operation and maintenance arising from inefficient use – ultimately so the maximum amount of funding can be directed to instruction and programming.

What is considered “optimal space utilization” varies between large urban districts and small rural districts due to practical realities of population distribution, density, travel distances, and weather extremes. Additionally, an approach to optimizing space utilization varies between school districts due to declining enrollment, stable enrollment, increasing enrollment or shifting enrollment within the school district. As such, the Ministry will assess what is practical and achievable on a project specific basis as part of the PIR/PRFS and PDR.

**f. Potential Options**

Based on the current situation within a district and the constantly changing educational environment, it would be unusual if a district had no other options for the future of its facilities. These options will quantify the operational costs, specific capital projects and components that require further analysis or public consultation.

School districts experiencing continued declining or shifting enrollments should reduce the inefficient use of school facilities through facility consolidation. Various options should be evaluated to determine a preferred option. Should the building be replaced rather than renovated, and conversely, should the building be renovated rather than replaced? If a replacement is in order, is it more practical to add on to other schools to reduce capacity or need for the replacement school?

For school districts experiencing significant growth, there may be options for new schools, consolidations, reconfiguring or property acquisition to protect future sites.

All of these options will have an effect on both operating and capital costs. If, as a result of this evaluation, a capital project is being requested and the district is below the Ministry utilization guidelines or proposes an addition, replacement or new space, the district must clearly identify what other options have been considered.

**g. Comparison of Options**

Based on the above evaluation, it should then be possible to identify other options to compare to the base case (current situation).

The Ministry will consider replacement, in special circumstances, addition requests that are supported by a comprehensive business case evaluation that confirms the optimal utilization of schools in consideration of their age, building condition, capacity, and location. The business case should also identify potential savings in operating costs as well as the type of change, affects on other facilities, estimated costs of conversion, and the timetabling for such changes.

In order for the Ministry to support a request for capital, the option proposed must be compared to the base case. Such a comparison should follow generally accepted rules for a “business case”. It will be important for infrastructure investment purposed that the overall least cost alternative be identified. In cases where this is not being recommended, then detailed justification must be provided.

#### **h. Implementation Strategy**

For capital projects, districts should be able to identify capital project priorities, the sequence for implementation and general timelines to meet the educational needs of the district.

The district should specifically identify what option it is recommending.

## **PART IV**

# **REPORT FORMAT AND DOCUMENTATION**

The LRFP report will consist of a report with specific schedules. The report will contain at least the information listed in these Guidelines and the Schedules.

The following schedules are required to be submitted as part of the LRFP.

### **MANDATORY SCHEDULES:**

- A. Overall School District Map
- B. Inventory of SD Facilities
- C. “Base Case” Summary
- D. Transportation of Students
- E. Option(s)
- F. Options Comparison
- G. Recommended Option and Implementation Strategy
- H. MPO Checklist and Concurrence Assessment Tool

### **OPTIONAL SCHEDULES:** (if applicable to LRFP)

- I. Consultation
- J. Statistical Study Areas
- K. Facility Audits

## **PART V**

# **SUMMARY**

Consultation is not a mandated requirement for the LRFP. However, it is suggested that the LRFP identify all consultation that might have been undertaken during its development.

Note that the Ministry of Education has published Ministerial Orders that affect the disposal of lands and improvements and the opening and closure of schools. It is critical, that if the LRFP has provisions affected by these or other Ministry directives, that the district be in compliance with the required consultation process and timeframes.

Should school districts have any concerns with the information requested or how to interpret these guidelines, they should contact their Ministry Planning Officer.

## MANDATORY SCHEDULES

- A. Overall School District Map – map showing SD boundaries, local jurisdiction boundaries, location of all facilities.
- B. Inventory of SD Facilities – spreadsheet to include, school data, capacity, enrollment, utilization, facility condition index, etc.
- C. “Base Case” Summary – current situation, but explains impact of continuing without new capital.
- D. Transportation of Students – outline of fleet info (#s, age, etc), replacement program in accordance with Ministry guidelines and rationale for transport.
- E. Option(s) – list of other options to achieve the district’s educational objectives.
- F. Options Comparison – tabular comparison chart to be developed.
- G. Recommended Option and Implementation Strategy.

## OPTIONAL SCHEDULES: (if applicable to LRFP)

- H. Consultation – identify all consultation by date and location during development of the LRFP
- I. Statistical Study Areas – maps with school identifiers of zones or geographical areas as required
- J. Facility Audits – scoring sheet attached as per Ministry guidelines only if formal facility audit conducted. Complete Facility Audit reports to be made available to Ministry on request.

## **APPENDIX H: CAPITAL PLAN BYLAW**

To access the document, please visit the following link:

[http://www2.gov.bc.ca/assets/gov/education/administration/resource-management/capital-planning/capital\\_bylaw.rtf](http://www2.gov.bc.ca/assets/gov/education/administration/resource-management/capital-planning/capital_bylaw.rtf)