

EDMONTON PUBLIC SCHOOLS

December 14, 2010

TO: Board of Trustees

FROM: E. Schmidt, Superintendent of Schools

SUBJECT: Responses to Trustee Requests for Information

ORIGINATOR: T. Parker, Assistant Superintendent Student Learning Services
B. Smith, Executive Director Finance and Infrastructure
T. Taylor, Director of Executive and Board Relations

RESOURCE

STAFF: Jack Geldart, John Nicoll, Anne Parker, Lorne Parker, Larry Schwenneker, Rosalind Smith

INFORMATION

TRUSTEE REQUEST #1, NOVEMBER 2, 2010, (TRUSTEE JANZ), PROVIDE INFORMATION REGARDING THE FEASIBILITY OF A THREE-YEAR PILOT PROJECT TO CONDUCT EXIT INTERVIEWS WITH STUDENTS WHO LEAVE HIGH SCHOOL PREMATURELY AT VARIOUS SITES IN THE 2011 YEAR TO ATTAIN BETTER FIRST-HAND INFORMATION AS TO WHY THESE STUDENTS ARE CHOOSING NOT TO COMPLETE THEIR EDUCATION. The intent of holding exit interviews with students intending to drop out of school is to identify the reasons why students leave school and use this information to implement system-wide improvements.

It is feasible to complete a three year pilot related to exit interviews.

To ensure a high quality process is developed, it is recommended that the following steps be undertaken:

1. A literature review of practice in other jurisdictions to identify the best practices, barriers and advantages of system-wide exit interviews.
2. A questionnaire be developed and vetted by high school principals.
3. Counsellors, student services staff members and other staff working directly with students in support roles be provided in-servicing on the intent of the exit interviews and support in completing questionnaires with students.
4. A central data base be developed for the results of interviews that would allow for the data to be interpreted.
5. On a yearly basis the data would be reviewed, analyzed, themes identified and information provided to central units, schools and the Board of Trustees.

The creation of a standardized process for exit interviews would be additive to the plans of central units and schools. No resources have been identified for the project and resources would need to be diverted from other projects.

Current Status

The standardization of exit interviews would supplement work already being completed in our high schools. Last year, 2009-2010, district high school principals developed a pilot project - "Beyond Year 3". The intent of the project is to identify students who have withdrawn from high school, or who are at risk of withdrawing, make contact with the students and look to develop a more customized program that would create future success.

This pilot works as follows:

1. At the end of each month, liaison workers funded by Argyll, Center High, Outreach and Metro Continuing Education, review information of students who have withdrawn from high school.
2. Contact is made with these students.
3. Meetings, if possible, are planned and a high school completion plan is developed accessing our non-traditional high school settings, i.e., Center High, Metro Continuing Education, Argyll and Outreach.

Additionally, liaison workers meet with high school administrators and teachers to explain the options that can be made available to students who may be experiencing difficulty in their neighbourhood high school. This allows for support to be provided to students prior to the decision to leave school.

TRUSTEE REQUEST #11, NOVEMBER 16, 2010 (TRUSTEE RIPLEY), PROVIDE AN ANALYSIS OF HOW THE PROPOSED FRAMEWORK FOR NEW EDUCATION ACT ALIGNS WITH THE BOARD'S STATED PRIORITIES FOR THE NEW EDUCATION ACT AND WITH RESPECT TO THE MINISTER'S TRANSFORMATION OF THE EDUCATION SYSTEM. An overview of the Minister's transformation of the education system is provided in the document *Inspiring Action on Education*

<http://engage.education.alberta.ca/uploads/1006/20100621inspiringact86934.pdf>

Key to the transformation are:

- creation of inclusive school districts
- more flexible approach to the delivery of education
- emphasis placed on education of the whole child as outlined in the competencies of:
 - Critical Thinking and problem solving
 - Creativity and Innovation
 - Social Responsibility and Cultural, Global and Environmental Awareness
 - Communication
 - Digital Literacy
 - Lifelong Learning, Self-Direction and Personal Management
 - Collaboration and Leadership

Framework for the new *Education Act* (October 7, 2010)

The last major revision to the *School Act* occurred in 1988. The framework document (Appendix I) was developed, as was *Inspiring Action*, as a result of public engagement and Alberta Education input. The concepts contained in *Inspiring Action* are informing potential changes in the *School Act*.

In October 2009, the Board provided input into the development of the new legislation (Appendix II). The following table demonstrates where there is alignment between the three documents.

Inspiring Action	School Act Framework	Edmonton Public Schools
Part 1: Access to Education		
<ul style="list-style-type: none"> • increased flexibility to access education 	<ul style="list-style-type: none"> • multi-dimensional access • increased age range to 17 for mandatory attendance • access to 21 years 	<ul style="list-style-type: none"> • access to education lower age for entrance/increase age for exit • flexible programs/programming
Part 2: Opportunities for Learning		
<ul style="list-style-type: none"> • increased flexibility- any time, any place, any space • wrap-around services 	<ul style="list-style-type: none"> • differentiated designations related to high school diploma • reaffirmation of locally developed courses • access to learning based on needs of students 	<ul style="list-style-type: none"> • ensure choice for programs and programming • cross ministry and interagency support • create a broader definition of success
Part 3: Student Needs and Dispute Resolution		
<ul style="list-style-type: none"> • one inclusive school district • engagement of stakeholders • parents as part of the learning team • wrap-around services • coordinated early learning • flexibility 	<ul style="list-style-type: none"> • boards are to create, communicate a dispute resolution process to be implemented prior to disputes being placed in front of the board • Attendance Board will shift to attending school to “participating in an education program”. 	<ul style="list-style-type: none"> • recognize value diversity • ensure parent and community partnerships

Inspiring Action	School Act Framework	Edmonton Public Schools
Part 4: Governance and Roles		
<ul style="list-style-type: none"> • flexible responsible boards • inclusive school districts • wrap-around collaboration 	<ul style="list-style-type: none"> • active engagement of stakeholders in governance • hire superintendent • define roles • school authorities responsible to ensure at risk students receive a continuum of support consistent with philosophy of inclusive education • collaboration with external agencies 	<ul style="list-style-type: none"> • locally elected school boards are vital to a responsive education system • flexibility to hire superintendent without ministerial approval • interagency collaboration
Part 5: Financial Responsibility		
<ul style="list-style-type: none"> • ensure a balance between local autonomy • fiscal responsibility 	<ul style="list-style-type: none"> • local autonomy exercised with regard to fiscal accountability • restrictions around borrowing removed • clarification of responsibility and procedures for school closure will provide greater flexibility • transportation funding regulations simplified 	<ul style="list-style-type: none"> • financial flexibility related to borrowing • block funding for transportation
Part 6: Educational Progression and Occupations		
<ul style="list-style-type: none"> • responsibility for high standards and performance 	<ul style="list-style-type: none"> • duties of teachers, principals, support and non-teaching staff will be described • inclusion provision of teacher employment 	

The following area from *Inspiring Action* and the Edmonton Public Schools submission does not appear in the *School Act Framework*:

- lower the minimum age for funded access to children (*Inspiring Action*).

TRUSTEE REQUEST #12, NOVEMBER 16, 2010 (TRUSTEE SPENCER), WHAT INITIATIVES ARE CURRENTLY UNDERWAY IN DISTRICT SCHOOLS TO SUPPORT LESBIAN, GAY, BISEXUAL, TRANS-IDENTIFIED AND QUESTIONING/QUEER (LGBTQ) YOUTH? WHAT ARE SOME OF THE BEST PRACTICES ADOPTED BY OTHER JURISDICTIONS TO CREATE ENGAGEMENT WITH SEXUAL MINORITY COMMUNITIES, PARTICULARLY IN RESPONSE TO RECENT HIGH-PROFILE SUICIDES IN NORTH AMERICA LINKED TO HOMOPHOBIC BULLYING? The Board believes that a responsive, safe, caring and inclusive school environment is necessary for students to learn and achieve high academic standards.

Throughout the 2010-2011 school year several initiatives will be unrolled district-wide to bring awareness, education and support to issues regarding sexual orientation and gender. They are as follows:

- Mr. Kris Wells, doctoral student at the University of Alberta, will provide research based strategies as to how to educate parents, students and staff on issues regarding sexual orientation and gender. Mr. Wells will meet with all principal groups throughout the year and will also consult with individual schools upon request.
- Mr. Wells will provide educational support to current Gay Straight Alliance (GSA) student clubs and assist schools who are wishing to establish GSA groups for their students. The GSA clubs have had a positive impact in schools over the past eight years.
- A professional development opportunity will be provided to district staff to increase their knowledge regarding prevention of gender-based violence and hate crimes in the community.
- A promotion of library books for elementary students which reflect individuality and inclusiveness, will be shared with elementary principals. Resource literary material lists will also be compiled and circulated for junior high and high school libraries.
- Forums, held in collaboration with other community organizations, such as the peer support network recently held at Victoria School, will continue to educate student communities on how to access support for complex issues and conflict they may be facing regarding sexual orientation and gender.
- The Community Helpers Program will be piloted at W.P. Wagner during the 2010-2011 school year. This program, funded by Alberta Health Services, provides students with information and training regarding suicide prevention.
- As part of the Safe, Caring and Respectful Learning Environments Policy it is expected that all leadership staff in schools will respond to any incident that can be viewed as unsafe to the school community, which would include homophobia, transphobia, sexual harassment or sexual misconduct.

TRUSTEE REQUEST #15, NOVEMBER 16, 2010 (TRUSTEE JOHNER), EXPLAIN THE COSTS ASSOCIATED WITH 2009-2010 SCHOOL CLOSURES. THIS REPORT SHOULD INCLUDE THE TOTAL COST BREAKDOWN INCLUDING TRANSPORTATION OF TECHNOLOGY (COMPUTERS AND SMARTBOARDS), TRANSPORTATION OF EQUIPMENT (SUCH AS DESKS, LIBRARY MATERIALS AND OFFICE EQUIPMENT) AND REPURPOSING OF SCHOOL SPACE (SUCH AS LOWERING WATER FOUNTAINS, LEASE HOLD IMPROVEMENTS, LOCKER INSTALLATION, ADDITIONAL SUPPLIES AS WELL AS STAFF COSTS) THAT WERE REQUIRED TO ENSURE APPROPRIATE ACCOMMODATIONS FOR THE RELOCATION OF STUDENTS. The budget approved for this project was \$1,671,700. Total cost of changes necessary to accommodate the revised school use at the receiving schools was \$1,579,939. The costs of the changes included work at Hardisty, Spruce Avenue, Delton, John A. McDougall, Parkview and Gold Bar. The material/services component accounted for 34 per cent of the total cost while the labour component accounted for 62 per cent of the total cost and external contracts accounted for four per cent. The costs included all work required to change the schools involved to provide the learning environment required for the students. The costs included subdividing large unused spaces into classrooms, Career and Technology Services (CTS) upgrades, washroom upgrades and modifications, special needs upgrades, new flooring, new ceiling systems, lighting, mechanical upgrades, millwork upgrades, new lockers and cubbies painting and other required modifications in selected areas.

Approximate cost related to moving computers from the closed schools to the receiving schools was \$22,000. No SMART Boards were moved, however there were 12 SMART Boards purchased for Hardisty School and four SMART Boards for Gold Bar School at a cost of \$56,000. Approximate cost related to moving equipment such as desks, library materials and office equipment was also \$22,000. These costs are in addition to the above cost of \$1,580,000. The 2010 receiving school costs associated with the necessary changes as of November 2010 are listed below.

School	Total Cost	EPS Maintenance		
		Material/Services	Labour	External Contract
Hardisty	\$759,255	\$286,615	\$467,334	\$5,306
Spruce Ave.	\$356,619	\$117,497	\$228,506	\$10,616
Delton	\$364,757	\$111,044	\$196,379	\$57,334
J. A. McDougall	\$2,554	\$194	\$2,360	
Parkview	\$64,661	\$15,650	\$49,011	
Gold Bar	\$32,093	\$9,393	\$22,701	
Grand Total	\$1,579,939	\$540,393	\$966,291	\$73,256
		34%	62%	4%
Budget	\$1,671,700			
Variance	\$91,761			

TRUSTEE REQUEST #16, NOVEMBER 16, 2010, (TRUSTEE JANZ) PROVIDE STUDENT POPULATION PROJECTIONS FOR EDMONTON COMPILED BY THE CITY AND PROVINCE FOR THE YEAR 2020 AND BEYOND IF SUCH INFORMATION IS AVAILABLE: The City of Edmonton and the Government of Alberta prepare population projections for a variety of purposes. The projections are based on varying methodology and land area. The following is a compilation of these projections prepared by or for the City of Edmonton and provincial departments.

The first two tables and two graphs provide population projections for the municipality of the City of Edmonton. Tables 3 and 4 relate to the district student population projections and historical trends. The remaining tables and graphs were prepared for larger land areas that include the City of Edmonton and surrounding region. The regions are not equal in area; therefore, population projections for the regions vary.

Table 1 compares the actual and projected population for the City of Edmonton in 2005 and 2009 and presents excerpts from two population projection documents. The two projection documents were completed approximately one year apart.

Table 1: Comparison between Civic Census and Population Projections
<http://webdocs.edmonton.ca/InfraPlan/demographic/Population%20Forecast%20City.pdf>
 2005 and 2009 City Census and Population & Employment Forecasts: 2003-2030, and City of Edmonton, Technical Report are available in the Trustees' On-Line Reading Room.

	2005 Actual	2005 Projected City base	2005 Projected City high	2009 Actual	2009 Projected	2010 Projected	2010 Projected City base	2010 Projected City high	2020 Projected City base	2020 Projected City high	2030 Projected City base	2030 Projected City high
0-4 years	37,267	39,667	39,667	38,435	40,604	41,145	42,175	42,355	44,494	48,157	42,601	49,443
5-9 years	39,320	38,762	38,762	35,683	39,828	40,341	38,537	38,734	42,129	45,134	42,075	48,713
10-14 years	42,195	41,620	41,620	37,902	40,950	40,591	38,333	38,489	39,548	42,233	41,913	47,858
15-19 years	47,928	45,804	45,804	43,953	48,323	47,753	44,758	44,962	40,327	42,897	44,037	49,419
Total	166,710	165,853	165,853	155,973	169,705	169,830	163,803	164,540	166,498	178,421	170,626	195,433

The data indicated as actual within Table 1 is from the City of Edmonton 2005 and 2009 Civic Census. The city base and city high projections for 2005, 2010, 2020 and 2030 are from the Population & Employment Forecasts: 2003-2030, City of Edmonton, Technical Report, prepared by Applications Management Consulting Ltd., August 2005.

The projected data for 2009 and 2010 was taken from Table 2: City of Edmonton Population Forecast, 2005–2011, prepared by the City of Edmonton - Planning and Development department, April 2006.

It is notable that the City's projected 2009 population compared to actual City Census 2009 population: for 0 to 4 year-olds was over projected by 5.3 per cent; for 5 to 9 year-olds was over projected by 10.4 per cent; for 10 to 14 year-olds was over projected by 7.4 per cent; for 15 to 19 year-olds was over projected by 10.4 per cent. In total, the City projection for the 2009 school-aged population was over projected by 11,063 residents, or 8.6 per cent (128,601 projected, 117,538 actual).

The next two tables were generated by Edmonton Public Schools, Planning in November 2010.

Table 2: Historical and Projected Edmonton Public School student population

GRADE	2005	2006	2007	2008	2009	2010	2011	2012	2013
0	4671	5006	5020	5381	5564	5531	5300	5300	5300
1	5215	5280	5465	5496	5751	5766	5906	5676	5676
2	5436	5320	5258	5463	5488	5692	5746	5887	5656
3	5351	5562	5305	5321	5432	5511	5694	5748	5888
4	5649	5573	5587	5436	5353	5466	5562	5745	5799
5	5849	5890	5631	5759	5456	5411	5532	5627	5810
6	5884	6104	5872	5727	5803	5553	5464	5584	5680
7	5922	6073	6168	5891	5756	5809	5582	5493	5614
8	6252	6241	6189	6228	5985	5844	5899	5673	5583
9	6525	6421	6264	6232	6352	6081	5926	5981	5755
10	6553	6859	6635	6549	6516	6598	6330	6175	6230
11	6323	6610	6738	6621	6541	6547	6574	6306	6151
12	8875	8718	8537	8753	9125	9241	9149	9176	8908
20	628	606	654	751	772	861	850	850	850
TOTAL	79133	80263	79323	79608	79894	79911	79514	79220	78899

Table 2 indicates historical and projected student populations, historical data for 2005 to 2010 and projections for 2011 to 2013. The historical information is a list of district student population as reported on September 30 of each year to Alberta Education.

Table 3: Comparison of Actual and Projected Enrolments 2005-2010

Year	Actual	Projected	Variation	Level of Accuracy
2005	79133	78600	-533	-0.67%
2006	80263	78600	-1663	-2.07%
2007	79323	80600	1277	1.61%
2008	79608	78701	-907	-1.14%
2009	79894	79034	-860	-1.08%
2010	79911	79799	-112	-0.14%

Table 3 indicates the accuracy of the District's historical student population projections from 2005 to 2010.

Table 4: Projected School Populations – Edmonton: 2011 and 2016

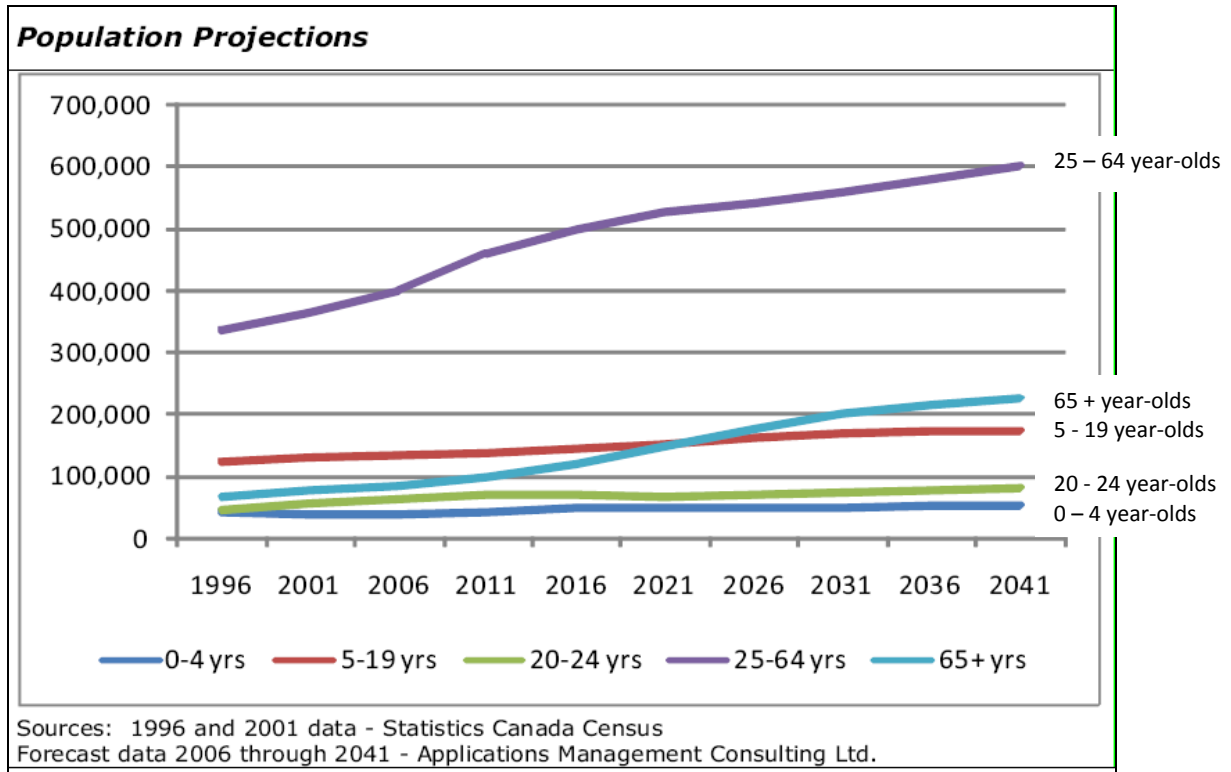
http://www.municipalaffairs.alberta.ca/documents/FINAL_REPORT_no_appendices.pdf
(page 171 and 173)

	2006	2011	2016
Elementary – Junior High	86,025	86,885	92,015
Senior High	25,147	25,180	24,626
Total	111,172	112,065	116,641

Table 4 was excerpted from *Growth Pressures and Social Infrastructure in the Capital Region: Issues, Gaps and Conclusions, Discussion Paper*, prepared for Alberta Employment, Immigration and Industry, December 2007. This table indicates the total projected school populations for the City of Edmonton for 2011 and 2016. These projections include school populations for all school jurisdictions within the City of Edmonton.

Graph 1: City of Edmonton – Municipal Profile (2007)

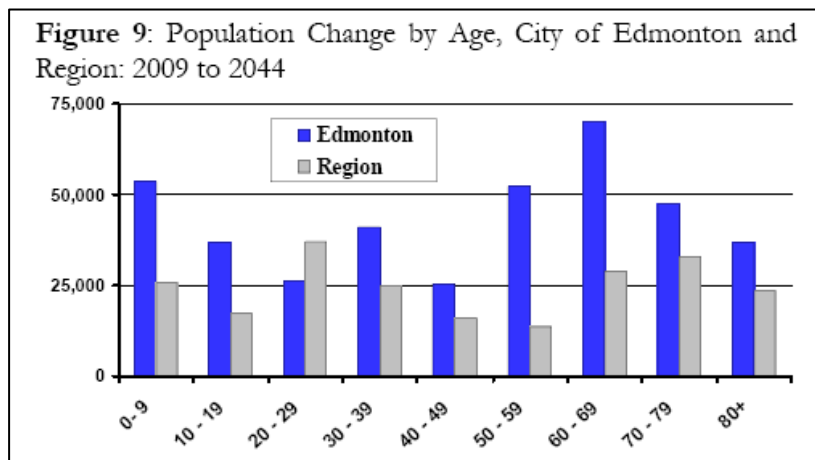
http://www.alberta.ca/home/CapRegionFiles/FINAL_REPORT_Appendix_A.pdf (page 49)



Graph 1 was prepared by Application Management Consulting Ltd. for the Province of Alberta 2007 Capital Region Integrated Growth Plan.

Graph 2: City Trends Second Quarter 2010, Population Change by Age, City of Edmonton and Region: 2009 to 2044

http://www.edmonton.ca/business/documents/City_Trends_2010_Q2.pdf (page 5)



Graph 2 was excerpted from the City of Edmonton quarterly publication, *City Trends*. The publication provides current information on Edmonton’s economic and social trends. The projections in the *City Trends* document:

‘were prepared by first developing an economic growth scenario and then determining the employment and population needed to support the expected growth. A number of City planning documents were used to guide projections. These include the draft versions of the Municipal Development Plan: *The Way We Grow* and the Transportation Master Plan: *The Way We Move*.’ (page 5).

The following tables and graphs are population projections for regional areas which include areas beyond the boundaries of the City of Edmonton, and beyond the jurisdiction of Edmonton Public Schools. The regions are not equal in area, therefore population projections for the regions vary.

Table 5: Population Projections for Capital Health Region

<http://www.health.alberta.ca/documents/Population-Projections-2006.pdf> (page 64)

	2005*	2010	2015	2020	2025	2030	2035
<1	12,015	13,402	14,272	14,483	14,194	13,853	13,956
1-4 Years	46,298	52,516	56,561	58,580	58,308	56,817	56,215
5-9 Years	60,859	61,711	68,257	72,717	74,918	74,341	72,503
10-14 Years	67,902	64,740	64,671	70,824	75,526	77,443	76,861
15-19 Years	71,980	73,126	69,122	68,722	74,849	79,270	81,453
Total	259,054	265,495	272,883	285,326	297,795	301,724	300,988

*Actual

Table 5 was excerpted from the *Population Projections for Alberta and its Health Regions 2006-2035 Report* prepared by Health Surveillance and Environmental Health Branch, Alberta Health and Wellness, March 2007. The table is a combination of actual data and projections for the Capital Health Region. The actual 0-19 population for the municipality of Edmonton as indicated in Table 1 and recorded in the City Census is 166,710 or 92,344 less than the actual 0-19 population for the Capital Health Region.

Tables 6 and 7 were excerpted from *Alberta Population Projections by Census Division, 2010-2050* prepared by the Government of Alberta, Finance and Enterprise.

Table 6: Population by Age Group (2010 to 2050), Medium Scenario, Census Division 11 (Edmonton) http://www.finance.alberta.ca/aboutalberta/population_reports/2010-2050-alberta-population-projections.pdf (pages 48, 52)

	2010	2015	2020	2025	2030	2035	2050
0-4 Years	75,600	84,350	83,365	79,275	76,230	78,165	91,655
5-9 Years	64,605	78,995	87,905	86,915	82,935	80,005	93,935
10-14 Years	67,440	68,365	82,925	91,815	90,930	87,065	92,770
15-19 Years	79,140	71,025	72,135	86,665	95,645	94,870	90,670
Total	286,785	302,735	326,330	344,670	345,740	340,105	369,030

Table 6 presents population projections for 0-19 year olds to the year 2050 for Census Division 11, which includes the City of Edmonton. ‘This report uses the standard component method to project population growth. It starts with the base-year population distribution by single year of age and sex. Then it applies fertility, motility and migration assumptions to the base population to project the number of births, deaths, and migrants that occur during the year. Finally, these three components are either added or subtracted from the base population to obtain the population projection for the subsequent years, by age and sex’ (page. 9).

Table 7: Population Distribution by Age Group, by Census Division, Medium Scenario (in per cent)

http://www.finance.alberta.ca/aboutalberta/population_reports/2010-2050-alberta-population-projections.pdf (pages 9, 96)

Census Division	Major City/Town	2009			2035			2050		
		0-14	15-64	65+	0-14	15-64	65+	0-14	15-64	65+
Census Division 11	Edmonton	17.0	72.1	10.9	14.9	64.3	20.7	15.2	60.2	24.6

Table 7 indicates the percentage of the population in three age groupings. The 0-14 age group is relevant for student population projections.

TRUSTEE REQUEST #17, NOVEMBER 16, 2010 (TRUSTEE JANZ), PROVIDE A SUMMARY IDENTIFYING PREVIOUS ATTEMPTS AND OUTCOMES BY THE EDMONTON PUBLIC SCHOOL BOARD TO CHANGE PROVINCIAL FUNDING FORMULAS REGARDING UTILIZATION RATES SINCE 2000. Attached (Appendix III) is a summary listing of available records of meetings, board reports and briefing notes which reference efforts to advocate for and or influence changes to provincial funding formulas related to space utilization rates since the 1999-2000 school year.

TRUSTEE REQUEST #19, NOVEMBER 16, 2010, (TRUSTEE CLEARY) PROVIDE A COMPARATIVE ANALYSIS OF UTILIZATION RATES (ALBERTA COMMISSION ON LEARNING, AREA CAPACITY UTILIZATION AND OPTIMAL ENROLMENT LIMIT) FOR EACH SCHOOL CURRENTLY ON THE SECTOR REVIEW LIST AS WELL AS THE UTILIZATION RATES FOR THOSE SCHOOLS OVER THE LAST 10 YEARS.

Provincial Utilization Rate

The Province calculates the District utilization rates annually. The utilization rate is used to determine eligibility for the addition of district student learning spaces. When the utilization rate within a specific sector is at or above 85 per cent, the District may be eligible for expansion funding within that sector. The attached tables (Appendix IV) provide the historical provincial utilization rates for central, south central and west 1 sector schools for the last 10 years.

Alberta Commission on Learning (ACOL) Capacity and Utilization

The ACOL capacity is an Edmonton Public Schools' measure to determine student capacity for a school. An ACOL student capacity is calculated by counting the number of classrooms and applying ACOL class size guidelines to each class.

For the 2010-2011 school year, a utilization rate for each district school has been calculated using the September 30 provincially adjusted student enrolment and the ACOL capacity for each school (Appendix IV). Historical data calculating ACOL utilization rates is not available.

Regardless of the measure used, the number of square meters the District operates remains the same. The Province provides funding for instruction and Plant Operation and Maintenance (PO&M) on a per pupil basis. The utilization rate does not have an impact on this funding. The Province does not recognize an ACOL utilization measure when considering eligibility for funding.

Optimal Enrolment Limit (OEL) and Utilization

It is not possible to calculate a utilization rate based on an Optimal Enrolment Limit (OEL) for a number of reasons:

- An OEL is a tool to manage enrolment.
- An OEL is not always a number. It can also be a grade or program limit (for example, Belmont School has an OEL of one class per grade for the regular program, and one class per grade for the Logos program).
- An OEL is a subjective number that may vary from year to year dependent upon the preferred use of space and the pressures on enrolment.
- An OEL does not consistently reflect the student capacity of the building.
- Not all district schools have an OEL. Currently, 64 per cent of district schools have an OEL.

TRUSTEE REQUEST #20, NOVEMBER 16, 2010 (TRUSTEE SHIPKA,) PROVIDE INFORMATION ON THE SAVINGS EXPECTED OVER THE SHORT AND LONG TERM FROM CLOSING THE FIVE SCHOOLS AND ONE PROGRAM (INFRASTRUCTURE AND PERSONNEL, ETC.). As a result of the closure of Capilano, Eastwood, Fulton Place, McCauley and Parkdale schools and the elementary program at Spruce Avenue School, savings incurred are associated with small school allocations, staffing, deferred maintenance, future school modernizations and utilities.

A. School Allocation

Schools with an adjusted enrolment below 275 students receive “a small school grant.” This allocation acknowledges the unique and complex financial demands associated with the challenges in operating a school with low enrolment.

City Centre Education Partnership (CCEP) Schools	2009-2010	2010-2011	Savings
Delton	\$54,614	Not Eligible	\$54,614
Eastwood	\$91,714	Closed	\$91,714
John A. McDougall	\$54,153	Not Eligible	\$54,153
McCauley	\$100,932	Closed	\$100,932
Norwood	\$79,271	\$48,472	\$30,799
Parkdale	\$94,249	Closed	\$94,249
Spruce Avenue	Not Eligible	Not Eligible	Not Eligible
Total	\$474,933	\$48,472	\$426,461

Greater Hardisty Area (GHA) Schools	2009-2010	2010-2011	Savings
Capilano	\$88,258	Closed	\$88,258
Fulton Place	\$85,723	Closed	\$85,723
Gold Bar	\$75,353	\$73,971	\$1,382
Hardisty	Not Eligible	Not Eligible	Not Eligible
Total	\$249,334	\$73,971	\$175,363

Savings associated with the small school allocation for CCEP and GHA is \$601,824. Schools listed as “not eligible” did not receive small school allocations as their adjusted enrolment exceeded 275 students.

B. Staffing

The closure of schools in the CCEP and the GHA resulted in a reduction of administrative, teaching, administrative assistants, support and custodial staff.

The staff costs in the following table were calculated applying the per unit rates for the 2010-2011 school year for all staff groups.

CCEP Staffing Cost Savings

CCEP Schools	2009-2010	2010-2011	Savings
Teaching	\$8,275,238	\$6,289,542	\$1,985,696
Custodial	\$794,183	\$474,620	\$319,563
Administrative Assistant	\$387,090	\$224,840	\$162,250
Support Staff	\$1,180,106	\$794,723	\$385,383
Principal	\$838,793	\$486,197	\$352,596
Assistant Principal	\$428,086	\$323,950	\$104,136
Total	\$11,903,496	\$8,593,872	\$3,309,624

GHA Staffing Cost Savings

GHA Schools	2009-2010	2010-2011	Savings
Teaching	\$4,591,840	\$3,893,190	\$698,650
Custodial	\$478,732	\$278,613	\$200,119
Administrative Assistant	\$229,780	\$117,360	\$112,420
Support Staff	\$920,134	\$688,454	\$231,680
Principal	\$481,731	\$250,567	\$231,164
Assistant Principal	\$108,586	\$112,141	-\$3,555
Total	\$6,810,803	\$5,340,325	\$1,470,478

A total savings of \$4,780,102 on staffing resulted from the closure of five schools. Assuming a stable student enrolment in CCEP and GHA schools and no staff cost increases, \$4,780,102 would be saved on a yearly basis.

C. Infrastructure

Operating costs in a repurposed building are completely recovered from the tenants. Currently, Edmonton Public Schools has three schools, Eastwood, Parkdale and Prince Rupert that remain closed without being repurposed. Prince Rupert School housed the Rites Of Passage program until June 30, 2010. This program is now located at Amiskwaciy Academy. As these schools have been vacant for three months, it is not possible to compare the annual utility costs to when they were in operation.

The following tables reflect the actual 2009-2010 utility costs for Capilano, Eastwood, Fulton Place, McCauley and Parkdale schools prior to closure. August 2010 electricity data and June to August 2010 gas data are not yet finalized and will be subject to some minor adjustments.

Actual utility costs have been provided and savings are based on an estimated reduced consumption of natural gas at 40 per cent, electricity at 60 per cent and water at 80 per cent.

2009-2010 Data	Actual Gas	Actual Electricity	Actual Water	Total Actual Utility Costs
Capilano	\$46,887	\$11,857	\$7,174	\$65,918
Eastwood	\$74,256	\$22,398	\$3,203	\$99,857
Fulton Place	\$49,589	\$16,090	\$5,125	\$70,804
McCauley	\$27,476	\$31,857	\$3,331	\$62,664
Parkdale	\$64,829	\$21,481	\$3,383	\$89,693
TOTALS	\$263,037	\$103,683	\$22,216	\$388,936

2009-2010 Data	Estimated Natural Gas	Estimated Electricity	Estimated Water	Total Estimated	Savings
Capilano	Recovered from tenant	Recovered from tenant	Recovered from tenant		\$65,918
Eastwood	\$44,554	\$8,959	\$641	\$54,153	\$45,704
Fulton Place	Recovered from tenants	Recovered from tenants	Recovered from tenants		\$70,804
McCauley	\$27,476	\$31,857	\$3,331	\$62,664	\$0
Parkdale	\$38,897	\$8,592	\$677	\$48,166	\$41,527
TOTALS	\$110,927	\$49,408	\$4,649	\$164,983	\$223,953

The closure of these five schools is projected to result in a savings of \$223,953. Assuming stable utility rates this amount will be saved on an annual basis. Capilano and Fulton Place schools are fully leased with all operational costs recovered from tenants. McCauley School is the site for the District's Transition Program; however, some of the space is leased to external organizations. As the primary purpose for this building is a District program, it is anticipated that the majority of the utility costs would be a District expense. Eastwood and Parkdale schools, while they remain vacant, would have District costs associated with the maintenance of these buildings.

Long term savings costs are also associated with deferred maintenance. These costs are items that need to be replaced or upgraded in the immediate or near future (boiler replacement, window upgrades, roofing work, etc.). The following information is based on maintenance assessments completed by Facilities Services.

School	Deferred Maintenance Cost
Capilano	\$2,122,713
Eastwood	\$2,610,998
Fulton Place	\$1,137,058
McCauley	\$139,806
Parkdale	\$2,345,287
Total	\$8,355,862

Additional long term savings are associated with future school modernization projects. School modernization costs (Appendix V) are based on modernization funding rates provided by Alberta Infrastructure.

School	Major Modernization Cost
Capilano	\$6,944,928
Eastwood	\$11,312,784
Fulton Place	\$7,899,647
McCauley	Recently modernized
Parkdale	\$8,677,604
Total	\$34,834,963

A future cost of \$34,834,963 to modernize these schools will not be required as a result of school closure.

Overall, there are significant savings as a result of the closure of Capilano, Eastwood, Fulton Place, McCauley and Parkdale schools. Savings are comprised of annual costs associated with small school allocations, staffing and utilities of an estimated \$5,605,879 per year. Deferred maintenance and future school modernizations would result in a projected savings of \$43,190,825.

APPENDIX I	Education Act Proposed Framework
APPENDIX II	Edmonton Public Schools Submission to the <i>School Act</i> Review
APPENDIX III	Summary of Attempts to Influence Utilization Rate and Funding Models
APPENDIX IV	Historical Provincial Utilization Rates
APPENDIX V	CCEP and GHA Facilities Condition and Future Expenses

TP:BJS:TT:ja

DRAFT

Education Act 2011 Proposed Framework October 7, 2010

A vision for education for the twenty-first century has been articulated as a result of public engagement initiatives. The vision defines education as core to individual and societal well-being. The role of education goes beyond subject matter content and competencies to developing citizens who will embrace the challenges that they will face in an increasingly complex world, and who will actively engage in their communities' activities, growth, and well-being. Student, parent and community engagement is viewed as critical to the strength of the system's foundation. This new vision embraces education as fundamental to the development of a progressive democratic civil society. The proposed *Education Act* is developed on the foundational themes which have emerged through Department discussions. The themes are represented in the act by the Parts into which the act is divided.

Preamble

The Preamble will be a statement of the vision of education in Alberta. It will emphasize

- education is at the core of individual well-being;
- education is foundational to a healthy democracy, and as such is at the core of societal well-being;
- the role of education is to develop citizens who will be engaged in their communities and will be able to face the challenges they face in an increasingly complex world.
- The Government of Alberta recognizes the importance of enabling high quality and socially engaging learning opportunities with flexible timing and pacing through a range of learning environments to meet diverse student needs.

Limiting the Preamble to these concepts will provide us with the best opportunity to express the heart and soul of the act at the outset.

There are other foundational statements which many people would expect to see in the Preamble. Including these statements in the Preamble is an option; in the alternative, these statements might be addressed by having a purpose statement at the beginning of each Part of the act, and would include:

- All Alberta children shall have access to the early childhood services to grade 12 education system.
- The educational interest of the student is the paramount consideration in making decisions about a child's education.
- Parents have rights and responsibilities for their children's learning.
- Student success is the primary goal of the education system and government has a responsibility to provide the structure and supports to enable student success.
- The Government of Alberta is committed to the preservation and continuation of rights to minority language and minority denominational education as described and protected by the Constitution of Canada

DRAFT

Interpretation

Definitions

Part 1 – Access to Education

This Part of the act will define who the Province of Alberta and individual school authorities are responsible for educating, and how we provide that education. Access is significantly more multi-dimensional than formerly considered; it has gone beyond attending at the school house door and expecting entry, to including our concerns to provide meaningful opportunities for learning that are responsive to the individual needs of the student, whether those needs arise as a result of geography, ability, language, family circumstance, or a host of other factors which affect each child's access to education.

Purpose statements:

- All Alberta children shall have access to the early childhood services to grade 12 education system.
- The educational interest of the student is the paramount consideration in making decisions about a child's education.
- Early childhood learning begins long before formal education, and it is the responsibility of all stakeholders to support early childhood learning.

Proposed provisions:

1. Access will be provided to children who are four years and six months of age or older on September 1 of the school year.
2. Access will be provided to individuals who are younger than 21 years of age on September 1 of the school year.
3. Access will be provided to individuals who are lawfully entitled to be in Canada, are resident in Alberta and who have a parent that is lawfully resident in Canada.
4. A student is a resident student of the board of the district or division in which the student resides.
5. Individuals who are older than five years and six months of age and younger than seventeen years of age on September 1 shall attend school.
6. Provisions which describe the board's responsibilities to resident students, for example, to provide a safe and caring learning environment, and contain definitions of residence will be included in this Part.

Part 2 – Opportunities for Learning

This Part will reflect the concepts of access to instruction in various ways – in a variety of settings, times, and at a pace that reflects the individual needs of students and supports learner success. It will also describe the responsibilities of the Minister and the school authorities for programming and curriculum.

Purpose statement:

DRAFT

- School authorities (boards, charter schools and private schools) are required to assess the needs of students and provide access to learning that meets the needs of each student and supports educational success.

Proposed provisions:

1. The Minister may prescribe and authorize courses of study and education programs. Provisions contained in the *Guide to Education* are requirements, where indicated.
2. The Minister may set out by order the requirements for high school completion which will reflect competencies and may include differentiated designations with respect to high school diplomas.
3. A board or, with the approval of the Minister, a person may, subject to the act and the regulations, operate an early childhood services program.
4. A board may, subject to the act and the regulations, offer an alternative program to those students whose parents enroll them in that program.
5. A board may, subject to the act and the regulations, develop or offer courses or programs and instructional materials for use in programs or in schools.
6. A board may determine that a student is in need of specialized supports and services. The board shall, subject to the act and the regulations, provide access to those supports and services to meet the identified needs of that student.
7. A board may provide off-campus education programs to its students.
8. A board may provide continuing education opportunities.

Part 3 – Student Needs and Dispute Resolution

Student success is the primary goal of the education system. On occasion, the adults involved in making decisions concerning a student's education may disagree as to the best way to meet the student's learning needs, whether the needs arise as a result of the student's unique abilities, behaviours, or attendance.

Purpose statements:

- Student success is the primary goal of the education system and government has a responsibility to provide the structure and supports to enable student success.
- Parents have a right and responsibility to make decisions respecting the education of their children.
- Procedures to resolve issues surrounding a student's education must be fair and timely, and recognize the interests of the student, the rights and responsibilities of parents, and the responsibility of the local school authority.

Proposed provisions:

1. Boards shall develop a dispute resolution process that is in accordance with the requirements of the Minister as established by Ministerial order.
2. The dispute resolution process must be used before a student may appeal to the Board of Trustees.
3. The Board of Trustees may determine the limitations on which matters may be appealed to the Board.
4. A review by the Minister may be requested in circumstances where the issue is the student's right to access education or appropriate education programming for the student.

DRAFT

5. The standard of review on a review by the Minister is whether the decision of the Board of Trustees was reasonable in the circumstances, that is, whether the Board's policies with respect to appeals complies with the requirements of the legislation, whether the Board complied with its own policies fairly and transparently, and whether the education program provided for the student is reasonable.
6. A parent must seek review within 60 days of the decision of the Board of Trustees.
7. The Minister will, by regulation, establish processes to address circumstances where a board has determined that it cannot meet the identified needs of a student with complex or exceptional learning needs.
8. A teacher or principal may suspend a student for one class or up to five days, respectively.
9. A suspension may not exceed five days, unless the principal has made a recommendation to the Board of Trustees that the student be expelled. The Board of Trustees must make a decision as to whether or not to expel the student within ten school days after the date of the suspension.
10. The Board of Trustees may impose conditions respecting an expulsion at its discretion, and may direct or redirect a student to an education program at a location of the board's choice on a continuing basis beyond the current school year.
11. The Attendance Board mandate will reflect flexible timing and pacing in meeting students' instructional needs, and will shift focus from "attending school" to "participating in an education program".
12. The authority of the Attendance Board will include processes for alternative dispute resolution, in addition to formal Attendance Board hearings.

Part 4 - Governance and Roles

This Part is intended to set out the roles and responsibilities of the different types of school authorities. It should reflect the foundational theme that government has the responsibility and authority to determine the structure of school authorities, to set provincial standards for the roles and responsibilities of boards, and to support developing trustee and board competence. In addition, the importance of the connection of local communities with their schools and students as well as with the elected school authorities has been identified. Expectations concerning collaboration will be codified in this Part.

Purpose statements:

The Minister of Education and the Government of Alberta are accountable for the education of all students.

Each student has rights and responsibilities for their own learning.

Parents have rights and responsibilities for their children's learning.

Government has the responsibility and authority to determine the structure of school authorities and to set provincial standards for the roles and responsibilities of boards, charter, and private schools.

School authorities are expected to actively engage the parents, students, staff and community in the governance and delivery of education to their students.

School authorities are responsible for ensuring that all children and students who experience significant risk factors or disabilities are provided with a continuum of supports and services to assist them in achieving education success.

DRAFT

- School authorities are expected to collaborate with external agencies to ensure that all children and students receive the continuum of services and supports they require to achieve educational success.

Proposed Provisions:

1. **Students** - The rights and responsibilities of students for their learning will be clearly defined, and will include the expectation that each student will be an active participant in their learning.
2. **Parents** - The rights and responsibilities of parents for their children's learning will be clearly defined, and will include the expectation that parents are active partners with the teachers, principals and instructional team in their children's learning.
3. **Boards** - The roles and responsibilities of boards will include:
 - a) to deliver appropriate education programming to meet the needs of all students and to enable their success
 - b) to be accountable for student achievement of learning outcomes
 - c) to provide for the engagement of parents, students, staff, and the various communities of the board on board matters, where appropriate, and specifically on the board's multi-year plans and the achievement of goals and targets within those plans
 - d) to provide a safe and caring environment
 - e) to provide a continuum of supports and services to students with diverse needs consistent with the philosophy of inclusive education
 - f) to increase collaboration between the board and community-based service agencies in order to more effectively address the needs of all students
 - g) to develop and maintain policies and organizational structures that promote student well-being and success, including initiatives to address bullying, and to monitor and evaluate their effectiveness
 - h) to ensure effective stewardship of the board's resources
 - i) to recruit the superintendent, and to entrust the day-to-day management of the school authority to the staff through the superintendent
 - j) to develop and implement a code of conduct that applies to members of the board, which includes definitions of breaches and sanctions, in accordance with principles set out by the Minister
 - k) to establish appropriate dispute resolution processes
 - l) such other items as the Minister may consider.
4. **Powers of boards** will include the authority to
 - a) determine ward and electoral subdivisions with the approval of the Minister
 - b) open and close schools or school programs as necessary
 - c) enter into education service agreements for the education of First Nation students which must meet minimum requirements set by Ministerial Order to reflect the goal to provide for the best educational interests of the students
 - d) enter into agreements with other boards to provide for regional governance on all matters or any single matter that is a common interest among boards.
5. The Minister will have the authority to make regulations relating to the procedural and administrative requirements of boards.
6. **Trustees**
 - a) The duties of trustees will include complying with the board's code of conduct, and providing for the engagement of parents, students, staff, and various communities on board matters.
 - b) Elections - Qualification will continue to be determined by the Local Authorities Election Act, with the addition that where a separate school district has been

DRAFT

- established a member of the minority faith may choose to run for election as a public school trustee and to vote in the election of public school trustees.
- c) Disqualification - The reasons for which a trustee may be disqualified will include, in addition to the existing reasons for disqualification, a breach of the board's code of conduct.
- d) Appointment of trustees – Trustees appointed under these provisions shall be deemed to be members of the board and to have all the rights and obligations of trustees, and shall hold office until the next general election. The total number of trustees appointed under these provisions may not exceed one-third of the number of trustees on the board.
- Where a vacancy has occurred between elections, and in the event that no eligible candidates file nomination papers after two by-elections are attempted in accordance with the *Local Authorities Election Act*, the Minister will have the authority to appoint a trustee by Ministerial Order.
 - Where an education services agreement exists between a board and a First Nation band, the Minister, in consultation with the band and the board, may appoint a trustee representing the band.
 - Where there are underrepresented groups, a board may appoint, with the approval of the Minister, up to one third of the number of trustees to a board, and the Minister, in consultation with the board, may appoint up to one-third of the number of trustees to the board.
7. **Establishment and dissolution of public school districts, divisions, and regional divisions** - The distinctions between school districts, divisions and regional divisions will be removed, and will be redefined as “school divisions”.
8. **Establishment and dissolution of separate school districts and regions**
- a) The separate school electors in an establishment area (to be defined) where a separate school district has not been established may establish a separate school district within that establishment area.
- b) The procedural requirements for separate school establishment will reflect broader community involvement and less government involvement in the establishment of a separate school district, and will require that the establishment meeting and notice to the Minister has been completed by November 1 of the year prior to the school year in which the newly established separate school district is added to the separate school region.
- c) The Minister will have the authority to change the designation of a public school jurisdiction to a separate school jurisdiction, and the reverse, when the designations of the jurisdictions no longer accurately reflect the minority faith population.
9. **Separate school elector choice** – Separate school electors may choose whether to vote in the separate school district or in the public school district.
10. **Francophone education regions - application of the act**
11. **Establishment and dissolution of Francophone education regions**
12. The Minister will have the authority to make regulations relating to the procedural and administrative requirements of Francophone education regions.
13. **Charter Schools - application of the act**
14. **Establishment of charter schools**
- a) Charter schools will continue to be a part of the educational choices for parents in Alberta.
- b) The focus of charter schools will be on innovation and research.
- c) A school authority may apply to operate a charter school.

DRAFT

15. The Minister will have the authority to make regulations relating to the procedural and administrative requirements of charter schools.
16. **Private Schools - application of the act**
17. The Minister will have the authority to make regulations relating to the procedural and administrative requirements of private schools, including the authority to suspend or cancel the registration or accreditation of a private school if the evaluation, monitoring or inquiry of the private school discloses financial mismanagement or a failure to follow provincial regulations or policies.
18. **Inquiries and investigations** – the conditions under which an inquiry into the operation and administration of the board will be clarified to allow for a broad range of reasons for inquiry, including the failure to meet specified achievement outcomes. The Minister will have flexibility in instances where a less intrusive approach is preferred. The Minister will continue to have the authority to appoint an official trustee, where necessary.

Part 5 - Financial Responsibility

This Part of the act will deal with the roles and obligations of the boards and the Government of Alberta with respect to finance, financial and capital planning, spending, and financial accountability. Roles and responsibilities concerning the management of capital will be clarified and defined to allow better understanding of the authorities that each party holds.

Purpose statement:

- Local autonomy must be exercised with due regard to fiscal accountability.

Proposed provisions:

1. Boards will continue to be accountable for the expenditure of funds and to provide accurate financial statements to the Minister as required.
2. Provisions relating to property assessment, requisitions, and the Alberta School Foundation Fund will remain in effect.
3. Boards will continue to be able to access the Special School Tax Levy Plebiscite provisions.
4. Restrictions around borrowing by a school board for operational expenses will be removed. The Minister may, by order, set a threshold over which Ministerial approval for borrowing must be obtained.
5. A school board will be required to provide notification in advance to the Minister if it plans to purchase or lease land for a school building.
6. A school board will have the authority to determine whether it no longer has use for a school building, and will be required to notify the Minister when this determination has been made.
7. Ministerial approval will be required for school building projects but will not be required for non-school building projects.
8. Clarification of the definitions, responsibilities and procedures for school closure will provide greater flexibility and autonomy for school boards. School boards will be required to implement and make available to the public policies respecting closure of a school and the transfer of students from one school building to another school building.
9. Transportation funding and regulations will be simplified.

DRAFT

Part 6 - Educational Professions and Occupations

Provisions related to educational professions and occupations will be assembled in Part 6. The provisions that relate to professionals and paraprofessionals in the education sector will be moved into a separate act, the *Education Professions and Occupations Act* (working title) for introduction in 2012 or 2013.

Purpose statements:

- Alberta's education system requires increased flexibility, collaboration and community involvement to equip students with the competencies they will need for success.
- The role of the teacher and other staff who form part of the education experience of students is increasingly complex and requires a high degree of training, experience, and commitment.
- Government has a responsibility to support staff and boards in developing staff competence, and to set provincial requirements for the preparation, competencies, and performance of staff in the education system.

Proposed provisions:

1. Duties of teachers, principals and superintendents, as well as non-teaching employees, will be described.
2. The act will include existing provisions concerning teacher employment, contracts of employment, terminations, and the Board of Reference.

Edmonton Public Schools
Submission to the *School Act* Review
October 30, 2009

The Board believes that three main areas need to be included in any new provincial education legislation: 1) Defining Public Education, 2) A Focus on Success for All Students, 3) Establishing an Enabling Framework.

Defining Public Education

Alberta Education has recently increased funding to private educational institutions, straining the current understanding of what constitutes public education. What is it that the Alberta Education understands the roles of private, public, separate, francophone, charter and home education to be? The Edmonton Public School Board, in existence since 1881, holds firmly to principles and values that are hallmarks of its operations and believes that these values and principles must be embedded in the new *Act*. The Board expects the new legislation to affirm a commitment to public schools, which are mandated to accept and welcome all children, regardless of ability, ethnicity, culture, faith, language, socio-economic status, gender, or sexual orientation, as the foundation to realizing the province's aspiration for an educated, responsible citizenry.

Local Governance

Throughout this document it is assumed that locally elected school boards are vital to a responsive and effective education system. Local autonomy related to education and the delivery of programs belongs in the hands of school boards to ensure attention and responsiveness to the character and needs of the local community.

Access to Quality Education

The principle of access implies that all students are welcomed and included in schools and school districts. It also implies that school jurisdictions do all in their power to prevent any restriction of learning opportunities within the available funding.

Choice

It is understood that students learn in different ways. They receive, process and express new information and experiences in ways framed by personality, values and habit. Families also hold values about the role of education, how it is delivered, and what the outcomes of the education system should be. The new *Act* must provide the framework within which school jurisdictions provide a range of learning opportunities from which families and students choose the most appropriate pathway to success.

Equity

It is recognized that students come from diverse settings and backgrounds. These variable experiences mean that students come to school systems in different states of readiness to learn and participate in schooling. The education system must reduce the gaps between students with enriched and impoverished personal backgrounds.

Another aspect of equity relates to fairness in funding, especially as it relates to charter schools. For example, an arts focused charter school receives transportation funding, whereas a similar school in a public school district does not. This inequity must be addressed in the legislation.

Diversity

The new *Act* must recognize and value the diverse make up of students, families and staff members in the community and recognize that public schools will welcome any child regardless of ability, ethnicity, culture, faith, language, socio-economic status, gender, or sexual orientation and create safe, respectful learning environments for all.

Citizenship and Character Development

The role of citizenship and character development is crucial to social coherence and success. The *Act* should recognize the role schools and school boards play in developing young people prepared to fully participate socially, economically, and politically in their communities. The *Act* should also identify and provide ways for working with government departments and other agencies to enhance citizenship education.

A Focus on Success for all Students

The education system must ensure that the conditions for the success of all students are established and met. The following elements must be addressed:

- Ensure that the new *Act* is primarily focused on students and their success
- Consider both lowering the entry and increasing the exit compulsory age for schooling (i.e. make kindergarten compulsory, increase compulsory age from 16 to 18)
- Ensure cross-ministry and inter-agency support for integrated services that sustain students and families (including early education services, mental health and health supports, child welfare, justice services, etc.)
- Recognize that students require flexible programs that are not bound strictly by time (i.e. students may advance their programs as they are able, or they may need longer to complete programs of study)
- Recognize flexibility in student demonstrations of knowledge and skills
- Define levels of student success:
 - including the ability to successfully participate in a global knowledge community through such skills as critical thinking, creativity, second language acquisition
 - recognizing learning growth
 - recognizing the whole child
- Ensure parental and community partnership and involvement in the education process

Establishing an Enabling Framework

The new *Act* should address the following areas:

- Provide “natural person powers” to all school jurisdictions (This means that a board could undertake any initiative unless there is a prohibition against it in a new *Act*, currently boards are only allowed to do what is defined within the *School Act* and nothing more.)
- Establish enabling framework, rather than highly restrictive or prescriptive provisions (Create substantial outcomes and allow school jurisdictions flexibility in achieving those outcomes. For example, allow districts to select and hire a superintendent, without ministerial approval, allow districts to determine school closure procedures, allow districts to manage infrastructure projects for greater flexibility)
- Define the roles, rights and responsibilities for:
 - Students
 - Parents/guardians
 - Teachers
 - Principals
 - Secretary – Treasurers
 - Superintendents
 - Trustees
 - Partners (e.g. community members, Elders)
 - Alberta Education
- Financial flexibility related to borrowing for specific projects and revenue generating mechanisms (tax levy, sale of assets and services, other sources of revenue, etc.)
- Flexibility for local decision-making (i.e. locally developed courses and programs)
- Responsibility and accountability for results
- Allow for greater flexibility in the school calendar (e.g. August to May school year)
- The new *Act* should replace the highly regulatory sections with overarching outcome statements. These sections would be addressed through a system of regulations as determined by Alberta Education.
- School jurisdictions should be enabled to create its own charters or partnerships with other school jurisdictions, government departments and agencies to enhance use of research, innovation and creativity for educational opportunities for students.
- Ensure flexibility of transportation funding as block funding (and provide appropriate walk limits for students at various ages.)
- Make the values and principles for government decision-making explicit

Summary of Attempts to Influence Utilization Rate and Funding Models

Date	Event/Action	Audience	Message	Follow-up
09/8/1999	Briefing Note	Meeting with Standing Policy Committee on Learning	Requesting Alberta Infrastructure to develop policies for public space that will provide incentive for school districts who use school space for interagency initiatives; noting creative use of space (twinning of schools); urging government find ways for all students to have access to local schools within their communities (schools to serve new areas).	
09/13/1999	Meeting Agenda	Board and Superintendent Meeting with Minister of Learning	Discuss in further detail issues raised at the Standing Policy Committee on Learning September 8, 1999.	
12/30/1999	Letter and 12/13/1999 Meeting Summary	Letter to Minister of Infrastructure Re: meeting December 13,1999	Meeting summary points: current utilization rate formula used by province no longer relevant; request for more space to be exempt i.e. daycare leases, cafeterias. Concern that reorganization at the provincial level separated planning for educational programming from planning physical space for schools. Utilization rate should not be used as the basis to turn down requests for new school construction.	
10/30/2000	Meeting Agenda	Joint Meeting with Calgary Board, Edmonton Public School Board (EPSB) and the Minister of Infrastructure	Capital Funding: consideration of schools as community focal points; 44 developed neighbourhoods in Edmonton with no local school; perception that Alberta Infrastructure rewards low utilization rate jurisdictions; older buildings relative to other jurisdictions; advocating a sector model for utilization calculation to address needs of all neighbourhoods. All government approved initiatives that affect classroom (Edmonton Student Health Initiative Partnership) should reduce capacity for affected school.	
04/30/2002	Alberta School Boards' Association (ASBA) resolution	ASBA membership and Minister	ASBA to advocate for change to formula used to determine capacity and space utilization. http://www.epsb.ca/board/apr30_02/item06.pdf	

Date	Event/Action	Audience	Message	Follow-up
09/18/2002	Letter	Letter to Minister of Infrastructure	Requesting delay in implementing recommendations from Plant Operations and Maintenance (PO&M Stakeholder committee interim report – results in a 6.9 per cent decrease in funding – feel new formula flawed in that utilization rates are used to reduce the level of funding we would otherwise receive.	October 9, 2002 - Letter of Response from Minister – The new PO&M formula does impact school boards operating with lower utilization rates. If space is not required for educational purposes it should be declared surplus and closed. Willing to work with District in developing plan to reduce surplus space and willing to review funding based on plan to improve utilization.
10/17/2002	Briefing Note	Meeting with Minister of Learning	Seeking assistance in advocating to Minister of Infrastructure. The funding formula was revised to place more emphasis on space utilization and less on total area – this does not protect the public investment e.g. with a 75 per cent space utilization we cannot just replace 75 per cent of the roof ... leased space for services to children and community should be taken into consideration in the calculation.	
01/28/2003	Briefing Notes	Meeting with Minister of Infrastructure	Consistency in funding required, initiatives to reduce rated capacity and enhancing efficiency in the utilization of school space (partnership leases, disposal of portables, consolidation, receiving school review for proximity, alternative program location review, demolition of permanent space, reconfiguring of space, guidelines for securing additional new program spaces, sale of closed schools); transferability of funds from instruction to facilities.	
02/13/2003	Letter	From Minister of Infrastructure	Advising of one-time additional funding in recognition of challenges outlined in our recent letter in adjusting to lower PO&M funding.	

Date	Event/Action	Audience	Message	Follow-up
02/19/2003	Letter	To Minister of Infrastructure	Thanking him for additional one-time funding and the opportunity to meet on January 28, 2003. Requesting approval to transfer a total of \$1.9 million from our capital reserve to cover the deficit in our operating budget as a result of the sale of the “old administration building” for \$1.9 million.	
03/25/2003	ASBA resolution	ASBA membership and Minister	ASBA to establish a committee to review and develop recommendations for the consideration of the Minister of Infrastructure regarding proposed amendments to the <i>School Act</i> and provincial regulations on school closure such that the process ... provides more flexibility for school boards, i.e. closure within one school year. http://www.epsb.ca/board/mar25_03/item04.pdf	
04/22/2003	Letters to Ministers of Infrastructure and Learning	Board advocacy	Response to recent announcement of capital support – expressing appreciation and need for more.	
05/12/2003	Letter	Response to Alberta Learning’s operational Review of District management processes	Provincial rules for determining space utilization inappropriate and inconsistently applied, e.g. do not have same ability as rural schools to exempt space for school which serve only students with special needs i.e. L.Y. Cairns with class averages of 15 students is therefore only 54 per cent utilized by provincial calculation. ... (we) support community schools and only in circumstances where the educational opportunities for students could be enhanced would we be prepared to consider the closure of the only school in a neighbourhood. Request funding for “right-sizing” schools and consolidating two schools within one neighbourhood.	
05/13/2003	Meeting with NDP	Board advocacy	Topic of discussion included funding concerns and the District’s projected deficits. Meeting content similar to referenced meetings with the government and Liberal (Edmonton) caucus.	

Date	Event/Action	Audience	Message	Follow-up
01/26/2004	Briefing Notes for Meeting	Meeting with Ministers of Infrastructure and Learning	Serious concerns with proposed changes to the Disposition of Property Regulation – school space is a community asset – Board should continue to make the key decisions regarding the use of school space ... need ability to be able to lease a building for a year without specific approval of the Minister – many district partnerships involve long-term commitments for the use of school space – limiting leases to one-year terms could make partners reluctant to invest in space over short term.	
03/16/2004	Letter	From Minister of Infrastructure	Advising that based on feedback from school boards on the new 2002 formula for calculating capacity and utilization of schools on the basis of area per student – the formula was reviewed by a stakeholder committee. The committee recommends the current formula continue to be applied for new schools and that a two-stage dispute resolution process address concerns regarding the capacity rating of other schools through a peer review committee.	
03/30/2004	Media Key Messages	Response to Infrastructure Announcement	Expressing disappointment that Edmonton school boards will not receive funding for new school construction when Calgary school boards will receive funding for seven new schools. EPSB has been working to reduce our student spaces and have improved our utilization rate to 71 per cent yet receive no new school funding. This announcement does not recognize the needs of our students in the city’s newer neighbourhoods.	

Date	Event/Action	Audience	Message	Follow-up
04/13/2004	ASBA resolution	ASBA membership and Minister	<p>ASBA to urge Ministers of Learning and Infrastructure to ensure that any amendments to the Disposition of Property Regulation will recognize that school boards must play a vital role in determining the use of surplus school space to meet community needs and in protecting the capital asset value of district property ... as a means of maintaining direct accountability to their electorate, which ultimately provided the capital resources to fund school facilities.</p> <p>http://www.epsb.ca/board/apr13_04/item05.pdf</p>	
06/18/2004	Letter	To Minister of Infrastructure	<p>Providing EPSB's Ten-Year Facilities Plan 2005-2014 and Capital Priorities 2005-2008. District continues to maintain commitment to improving its district-wide utilization rate. Conveying the Board's ongoing concern that funding required to right-size facilities through demolition not be funded at the expense of existing school preservation projects, but instead be made available through new additional capital resources.</p>	
03/01/2005	Letter	To Peer Review Committee for Infrastructure Funding	<p>Requesting information on the status of our request for consideration for adjusted capacity by the Peer Review Committee (dispute resolution process). There is disconnect between the operational funding provided and the actual operating costs and this is the basis for our ongoing advocacy for a more accurate measure of school utilization.</p>	<p>03/21/2005 Letter from Chair, Peer Review Committee advising committee reviewing potential policy adjustments to adequately address school utilization rates, non-useable teaching spaces. Other issues identified regarding space exemptions and operational funding rates will be considered in evaluation of school facilities funding framework.</p>

Date	Event/Action	Audience	Message	Follow-up
03/23/2005	Letter	To Minister of Infrastructure and Transportation	Thanking for meeting of March 8, 2005 to discuss possible changes to the way capital funding and PO&M funding will be provided to school districts. Encourage measures that lead to stable and predictable funding for school buildings over the long term. Ten Year Facility Plan will provide details of a comprehensive strategy to address space utilization within the context of additional needs for new space and preservation of existing space.	04/18/2005 Letter of acknowledgement from Minister of Infrastructure and Transportation.
04/12/2005	ASBA resolution	ASBA membership and Minister	ASBA to request an independent government funded study to establish a plan to address the adequacy and funding for Alberta school infrastructure. http://www.epsb.ca/board/april12_05/item06.pdf	
07/31/2006	Briefing Note	Board advocacy	Briefing note regarding government announcement of funding increase for K-12 education system. ... Increase to Infrastructure Maintenance Renewal (IMR) significant – express appreciation but note the need for additional funding including for new school construction.	
12/12/2006	Board requested report	Board for advocacy	Administration prepared a report to identify potential infrastructure issues which may arise as a consequence of the sustainability review process. http://www.epsb.ca/board/dec12_06/item08.pdf	
12/12/2006	Board requested report	Board for advocacy	Administration prepared a strategy for addressing and communicating the need for prior provincial government commitment for infrastructure funding in support of facility needs and recommendations resulting from Sustainability Review. http://www.epsb.ca/board/dec12_06/item08.pdf	

Date	Event/Action	Audience	Message	Follow-up
04/11/2007	Letter	To Minister of Education	Responding to province's stated interest in exploring alternative funding models to support District needs for capital funding. Sharing current infrastructure challenges: Edmonton is a growing city and ESPB is experiencing increasing pressure to accommodate students living in the suburban areas of the city which are further and further away from existing schools. Condition of existing schools in mature neighbourhoods continues to deteriorate making them less attractive to parents and expensive for the District to maintain. One in four students live in a neighbourhood without a local school. We are running out of spaces to accommodate students living in suburban neighbourhoods within a reasonable transportation distance.	05/01/2007 – Letter from Minister of Education acknowledging April 11, 2007 letter from Board Chair. Government shares concerns and is evaluating a number of options for both conventional and alternative methods of funding and project delivery to address school boards in and around Alberta's larger urban areas.
09/11/2007	Briefing Note	Meeting with Premier, Ministers Liepert, Hancock & Zwozdesky, and MLA Lukaszuk	Board advocating for sustainable and predictable funding: longer term approach to capital needs.	
09/11/2007	Meeting Planner	Meeting with Premier, Ministers of Education, Health and Wellness, Capital Planning and MLA for Edmonton Castle Downs	Outline the District's needs and concerns for designated receiving schools to automatically receive modernization funding when schools are closed. Boards have been encouraged to use school space more efficiently, we have taken the difficult step of closing schools – would like recognition for having taken these steps with funding for receiving schools.	
03/10/2009	Submission to ASBA Infrastructure Survey	ASBA for advocacy	Board approved submission to ASBA Infrastructure survey http://www.epsb.ca/board/dec12_06/item09.pdf	

Date	Event/Action	Audience	Message	Follow-up
05/08/2009	Meeting – key messages	Meeting with the Capital Region Caucus on May 11, 2009	Sharing information from Discrete Choice Measures Survey and Johnston research findings. Discrete Choice Measures Survey to gather input about the community’s awareness of the challenges the District faces related to schools and school space. Participants indicated support for undertaking the work of sustainability and school closure reviews through a sector analysis basis and valued a smooth transition of student and staff in the case of a school closure. The survey illuminated values the wider community held toward schools and the management of school space: places where students could develop into creative, critical and adaptable thinkers, serve boarder community needs and for there to be community input into facility use after a school is closed.	
03/26/2010	Briefing Note	Editorial Board – Edmonton Journal	School closures and sector review process: significant over supply of student space which draws funding away from instruction - sector review objective way to determine which schools should close and stay open and which programs are required to meet student needs in each sector. Board committed to providing outstanding learning environments in all areas of the city. No plan to close all inner city schools or in mature areas – each remaining school must serve a wider area. Definition of community needs to change.	
05/20/2010	Briefing Note	Tri-level meeting	Tri-level meeting with Province and City re: space seeking assistance in addressing issues: Significant oversupply of student spaces which draws funding away from instruction; salary increases result in using operating reserve to maintain educational program – not sustainable. Sector review process is a systematic examination of how using our space to achieve efficiency and effective educational programming. Some issues beyond our control: funding, urban development, demographics.	

Historical Provincial Utilization Rates By Percentage

CENTRAL SECTOR SCHOOLS	ACU Utilization 2000-2001	ACU Utilization 2001-2002	ACU Utilization 2002-2003	ACU Utilization 2003-2004	ACU Utilization 2004-2005	ACU Utilization 2005-2006	ACU Utilization 2006-2007	ACU Utilization 2007-2008	ACU Utilization 2008-2009	ACU Utilization 2009-2010		ACOL Utilization 2010-2011
ATHLONE	70	73	70	76	76	70	64	62	65	70		67
BALWIN	49	48	53	46	46	62	65	64	62	62		72
BELVEDERE	49	51	101	90	90	62	56	50	57	60		62
CALDER	50	49	48	43	43	41	43	43	44	41		49
DELWOOD	79	81	74	78	78	78	71	71	69	71		75
GLENGARRY	75	68	66	70	70	72	75	72	75	78		98
INGLEWOOD	48	54	53	49	49	48	40	41	46	43		47
KENSINGTON	68	64	70	70	70	79	80	74	72	69		54
KILLARNEY	48	51	54	49	49	60	73	65	66	72		56
LAUDERDALE	66	69	65	62	62	59	64	55	55	74		64
MARTHUR	80	74	63	58	58	52	56	49	54	62		41
MEE-YAH-NOH	77	76	78	89	89	88	98	95	83	88		48
NORWOOD	40	39	41	47	47	34	38	41	39	32		102
OLIVER	44	54	51	47	47	46	42	32	30	28		38
PRINCE CHARLES	70	75	70	89	84	84	78	69	73	80		93
PRINCETON	59	65	67	62	62	58	56	61	58	53		36
RIVERDALE	61	59	57	52	52	49	51	47	47	41		46
ROSSLYN	69	67	67	61	61	80	80	81	85	87		70
SCOTT ROBERTSON	84	96	98	138	138	100	104	102	97	103		121
SPRUCE AVENUE	56	70	69	70	70	66	67	63	63	73		66
WESTGLEN	64	64	57	53	53	38	39	43	40	49		66
WESTMOUNT	47	40	38	43	43	41	45	43	37	36		34

SOUTH CENTRAL SECTOR SCHOOLS	ACU Utilization 2000-2001	ACU Utilization 2001-2002	ACU Utilization 2002-2003	ACU Utilization 2003-2004	ACU Utilization 2004-2005	ACU Utilization 2005-2006	ACU Utilization 2006-2007	ACU Utilization 2007-2008	ACU Utilization 2008-2009	ACU Utilization 2009-2010		ACOL Utilization 2010-2011
ALLENDALE	54	58	55	55	55	51	53	55	52	60		59
AVALON	83	85	50	92	92	88	84	81	83	78		65
AVONMORE	70	67	65	67	67	63	58	54	54	55		45
BELGRAVIA	65	71	62	63	63	80	82	91	91	100		98
CLARA TYNER	81	79	75	66	68	72	73	76	85	81		92
DONNAN	63	76	93	69	69	77	79	87	95	93		41
FOREST HEIGHTS	55	55	55	47	47	59	53	53	48	51		61
GARNEAU	38	30	35	43	43	46	45	44	40	46		66
GRANDVIEW HEIGHTS	121	127	134	101	108	109	107	103	107	108		101
HAZELDEAN	69	67	64	68	68	60	63	68	62	66		128
HOLYROOD	81	82	73	79	83	82	93	85	90	90		81
KENILWORTH	84	83	85	85	85	92	77	71	77	76		68
KING EDWARD	41	33	40	41	41	54	56	61	67	66		63
LANSDOWNE	76	73	66	62	62	61	66	66	68	64		79
LENDRUM	60	58	61	64	64	56	49	67	58	50		37
MALMO	41	38	37	31	31	30	32	39	44	53		61
MCKEE	39	33	35	34	34	38	41	42	43	45		49
MCKERNAN	65	68	68	67	67	63	58	58	58	75		85
MILL CREEK	26	27	34	38	38	38	38	37	40	42		55
MOUNT PLEASANT	110	94	94	111	111	129	100	78	86	89		60
OTTEWELL	92	94	91	92	92	96	100	97	103	96		74
PARKALLEN	41	37	41	41	41	45	49	48	49	52		54
QUEEN ALEXANDRA	16	21	31	33	33	37	37	35	28	30		30
RUTHERFORD	25	30	27	30	30	37	40	44	38	37		48
ACADEMY AT KING EDWARD	81	81	90	79	79	66	85	109	108	113		59
WAVERLEY	70	64	65	65	65	55	52	51	47	44		61
WINDSOR PARK	80	78	82	79	79	80	83	85	81	80		67

WEST 1 SECTOR SCHOOLS	ACU Utilization 2000-2001	ACU Utilization 2001-2002	ACU Utilization 2002-2003	ACU Utilization 2003-2004	ACU Utilization 2004-2005	ACU Utilization 2005-2006	ACU Utilization 2006-2007	ACU Utilization 2007-2008	ACU Utilization 2008-2009	ACU Utilization 2009-2010		ACOL Utilization 2010-2011
AFTON	63	64	54	50	50	52	58	61	70	69		86
BRIGHTVIEW	65	60	60	54	54	59	54	50	55	57		79
BRITANNIA	63	53	52	63	63	52	53	47	45	40		34
CORONATION	75	64	62	58	58	58	52	56	61	56		72
CRESTWOOD	120	126	129	130	130	122	123	124	120	117		105
DOVERCOURT	85	78	82	79	79	69	64	57	67	68		58
ELMWOOD	70	74	77	84	74	40	46	53	58	50		64
GLENDALE	69	71	74	76	76	83	79	82	76	70		60
GLENORA	57	58	58	56	76	65	68	66	72	70		89
GROVENOR	41	42	37	34	34	37	32	38	41	38		50
HILLCREST	65	61	61	66	66	70	67	69	68	56		49
JAMES GIBBONS	63	63	63	58	58	60	66	55	51	51		53
LAURIER HEIGHTS	80	76	73	69	69	69	64	61	60	67		61
LYNNWOOD	65	66	62	56	56	55	52	55	58	56		60
MAYFIELD	96	101	99	99	99	97	96	95	80	75		105
MEADOWLARK	67	73	73	74	74	69	59	49	52	55		60
PARKVIEW	85	85	84	82	82	75	73	72	64	61		66
PATRICIA HEIGHTS	76	80	85	91	91	82	86	86	79	77		74
RIO TERRACE	38	34	36	31	31	31	35	41	44	57		63
SHERWOOD	55	57	49	47	47	42	41	38	38	39		38
STRATFORD	32	28	28	0	8	49	56	59	62	67		82
WESTLAWN	57	65	69	66	66	52	46	47	51	50		45
WESTMINSTER	48	53	62	62	62	61	67	68	65	66		81
YOUNGSTOWN	47	51	48	46	46	42	42	41	36	43		64

CCEP Facilities Condition and Future Expenses (10 year window)

Jan 27, 2010

	McCauley Elementary / Junior High School B3209A	Norwood Elementary School B3234A	John A. McDougall Elementary / Junior High School B3210A	Eastwood Elementary / Junior High School B3097A	Parkdale Elementary / Junior High School B3245A	Delton Elementary School B3087A	Spruce Avenue Elementary / Junior High School B3277A
Year Constructed	1911	1908	1930	1921	1912	1946	1929
Sq Metres	4,580	3,399	5,485	5,588	4,271	5,130	4,410
ReCAPP Information (Alberta Infrastructure)							
Replacement Cost	\$12,204,313	\$9,057,512	\$14,613,575	\$14,837,128	\$11,378,844	\$13,667,669	\$11,750,012
FCI (maintenance events only)	3.59%	3.64%	8.71%	13.93%	14.43%	5.01%	24.93%
FCI (maintenance & non-maintenance events)	4%	5%	9%	69%	69%	83%	26%
General Factors:							
Modernized?	Modernized in 2002	Recently modernized	Recently modernized	Multi-story - large hallways	Multi-story - large hallways	Multi-story	Multi-story - large hallways
Asbestos Liability?	no	no	no	yes	yes	yes	yes
Good HVAC system?	yes	yes	yes	no	no	no	no
Accessibility?	yes	yes	yes	poor	poor	poor	poor
10 Year Potential for the physical building Reasoning							
	V Good	V Good	V Good	Poor	Poor	Fair	Fair
				Outdated design and expensive to renovate	Outdated design and expensive to renovate	Fair overall design	Fair overall design
				Poor layout	Poor layout	Fair layout	Fair layout
Expected Degree of Modernization							
	None	None	None	Major	Major	Major	Major
Maximum Support for Modernization per sq M (from AIT)							
				\$ 1,750	\$ 1,750	\$ 1,750	\$ 1,750.00
Modernization Cost							
				\$ 9,744,000	\$ 7,474,250	\$ 8,977,500	\$ 7,717,500
Consulting Fees (12.5%)							
				\$ 1,218,000	\$ 934,281	\$ 1,122,188	\$ 964,688
Project Fees (2%)							
				\$ 194,880	\$ 149,485	\$ 179,550	\$ 154,350
GST (1.6%)							
				\$ 155,904	\$ 119,588	\$ 143,640	\$ 123,480
Total Estimated Modernization Cost				\$ 11,312,784	\$ 8,677,604	\$ 10,422,878	\$ 8,960,018

Note:

Maintenance items

- failure replacement
- lifecycle replacement
- preventative maintenance
- repairs
- code replacement

Non-maintenance items include:

- lighting upgrades for energy efficiency
- hazardous material management
- barrier free access improvements
- indoor air quality improvements

Prepared by: Ken Erickson
Reviewed by: John Nicoll

HVAC - Heating Ventilation Air Conditioning

Greater Hardisty Facilities Condition and Future Expenses (10 year window)

Jan 28,2010

40

	Gold Bar Elementary School B3132A	Capilano Elementary School B3070A	Fulton Place School B3122A	Hardisty Junior High School B3144A
Year Constructed	1958	1958	1961	1957
Sq Metres	3,319	3,418	3,888	9,473
ReCAPP Information (Alberta Infrastructure)				
Replacement Cost	\$8,844,617	\$9,107,872	\$10,359,931	\$25,241,024
FCI (maintenance events only)	37.8%	32.9%	28%	16.9%
FCI (maintenance & non-maintenance events)	95%	33%	30%	64%
General Factors:				
Modernized?	No	No	No	No
Asbestos Liability?	Yes	Yes	Yes	Yes
Good HVAC system?	Fair to Poor	Fair to Poor	Fair to Poor	Fair to Poor
Accessibility?	Fair	Fair	Fair	Poor
10 Year Potential for the physical building Reasoning:				
	Fair	Fair	Fair	Fair
	One floor	One floor	One floor	Multifloor - two gyms
	Old HVAC	Old HVAC	Old HVAC	Old HVAC
				Large footprint
Expected Degree of Modernization				
	Major	Major	Major	Major
Maximum Support for Modernization per sq M (from AIT)				
	\$ 1,750	\$ 1,750	\$ 1,750	\$ 1,750
Modernization Support				
	\$ 5,808,950	\$ 5,981,850	\$ 6,804,175	\$ 16,577,750
Consulting Fees (12.5%)				
	\$ 726,119	\$ 747,731	\$ 850,522	\$ 2,072,219
Project Fees (2%)				
	\$ 116,179	\$ 119,637	\$ 136,084	\$ 331,555
GST (1.6%)				
	\$ 92,943	\$ 95,710	\$ 108,867	\$ 265,244
Total Estimated Modernization Cost	\$ 6,744,191	\$ 6,944,928	\$ 7,899,647	\$ 19,246,768

Note:

Maintenance items

- failure replacement
- lifecycle replacement
- preventative maintenance
- repairs
- code replacement

Non-maintenance items include:

- lighting upgrades for energy efficiency
- hazardous material management
- barrier free access improvements
- indoor air quality improvements

Prepared by:
Reviewed by:

Ken Erickson
John Nicoll

HVAC - Heating Ventilation Air Conditioning