

EDMONTON PUBLIC SCHOOLS

December 13, 2005

TO: Board of Trustees

FROM: Edgar Schmidt, Acting Superintendent of Schools

SUBJECT: Framework for Proposed Ten-Year Facilities Plan (2007 – 2016)

ORIGINATOR: Corinne McCabe, Executive Director

RESOURCE

STAFF: Jenise Bidulock, Michael Ediger, Kelly Hehn, Roland Labbe, Randy Leal, Deanne Patsula, Cindy Skolski

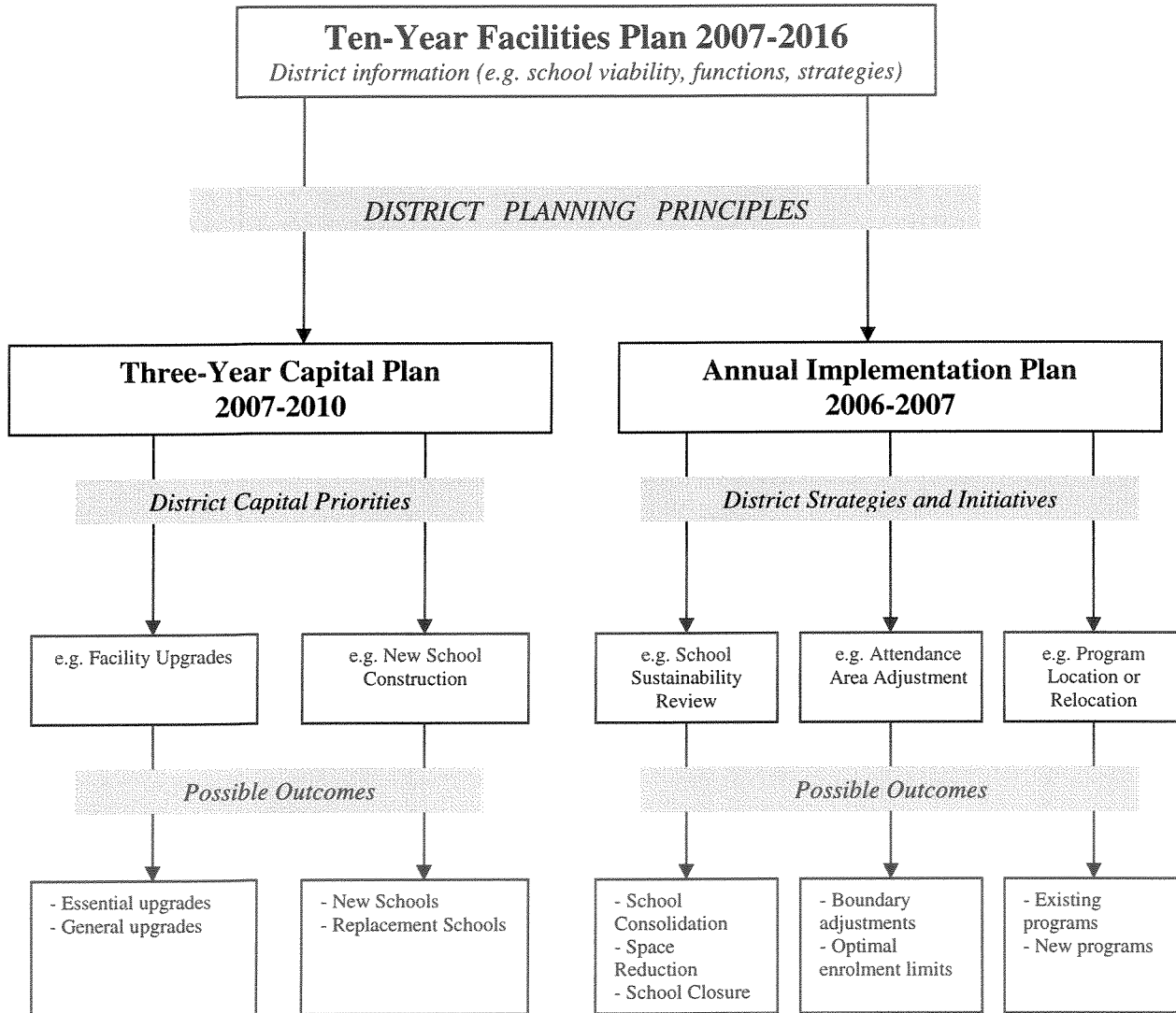
INFORMATION

Introduction

This report identifies a new conceptual framework for long-term student accommodation planning in the district. The framework ties together the major planning initiatives in the district, including The Ten-Year Facilities Plan and The Three-Year Capital Plan which are required by the province each year, and outlines a new initiative called an Annual Implementation Plan. This plan identifies the actions which will be undertaken each year to ensure the sustainability of district schools.

The framework includes several opportunities for communities and individual trustees to become meaningfully engaged in the development of major district plans, and in the identification of strategies which will affect schools. The following schematic diagram shows the relationships among the plans and possible outcomes. Elements of the schematic diagram are explained in more detail in the remainder of the report.

Implementation of the District's Ten-Year Facilities Plan



N.B.: The district's Three-Year Capital Plan and the Annual Implementation Plan will address all strategies and initiatives recommended within the Ten-Year Facilities Plan, not just those identified above.

District Planning Principles

The planning principles within the Ten-Year Facilities Plan, as approved by the Board of Trustees in May of 2005, present the district with a focus that is aimed at enhancing the district's capacity to plan for and make good decisions about its school facilities. Desired outcomes in this regard include providing viable student space where it is needed, providing accessible program choices to all students and providing safe and efficient transportation to students in need. In addition, the planning principles also guide the district in the process of identifying priorities for school capital projects and improve the district's capacity to ensure that its investment of scarce capital resources is justifiable and sound.

The planning principles that were approved as part of the Ten-Year Facilities Plan and have served as a guide and reference for the district's work in this regard are below: (excerpted from the Ten-Year Facilities Plan 2006-2015)

2.1.1 Equitable Access to Quality Learning Environments and Choice of Programs

- (a) Students at all grade levels will have equity of access to high quality, modernized facilities wherever they live in the city.*
- (b) A balanced range of regular, alternative and special education programs will be provided within each sector.*
- (c) While district programs will be established and maintained to meet the needs of the public, their distribution will be intended primarily to accommodate students from inside sectors.*

2.1.2 Creative Re-Use of Surplus Space

- (a) Surplus school space that is viable and has value to the community should be identified for potential partnership use.*
- (b) Partnership agreements will be at no cost to the district.*

2.1.3 Efficient Use of School Space in Sectors and Retention of Small Schools

- (a) In sectors with excess space, modernization projects will consist of targeted preservation of the school's required instructional space and this may be combined with demolition of unused and unneeded space within the school.*
- (b) The process will lead to retention of smaller schools in neighbourhoods, although consolidation, rightsizing or closure will be required, on an increasing basis, where enrolment is no longer viable.*
- (c) In growth sectors, initiatives will be aimed at achieving a sector utilization rate of 85 per cent to enable construction of new schools where they are needed in developing communities.*
- (d) The process will reduce the dependency on designated receiving schools and long ride times.*
- (e) Consideration will be given to upgrading receiving schools identified as a result of school or program closure.*

2.1.4 Accommodation and Program Needs Met Within Sectors

- (a) Where possible, student needs for programs will be met within the student's resident sector.*
- (b) Consideration will be given to ensuring that there is sufficient space within the district so that students do not have to travel great distances to access basic programs.*
- (c) The need to provide new schools in growth areas of the city is affirmed.*

2.1.5 Capital Investment Contingent on Confirmation of Long-term Viability

- (a) In the identification of existing schools for preservation projects, the school's long-term viability, in terms of programming and student enrolment, will be considered first and foremost.*
- (b) In instances where long-term viability is confirmed within existing, oversized buildings, space reduction initiatives will be incorporated as a component of a proposed preservation project.*
- (c) The district will continue to maintain and invest in existing school buildings where long-term viability has not been confirmed to ensure that all matters of life, health and safety are addressed.*

Context for Preparation of Ten-Year Facilities Plan (2007 – 2016)

Following the closure of four schools at the end of the past school year, the district undertook a review of its work leading up to the decision to begin the process of closure as well as the process of school closure itself. The results of an internal review and those of a review done by an external consultant engaged by the district pointed to the need, as expressed by parents and the community, that these processes need to be open and transparent, involve clear criteria for the identification of schools to be studied for closure, and have clearly defined timelines that allow for the meaningful participation of parents and communities.

In response to these conclusions, the Board of Trustees has given direction to the administration that the district include, within its next Ten-Year Facilities Plan, elements aimed at appropriately addressing these issues. Further direction was also given by the Board of Trustees that the next Ten-Year Facilities Plan include a review of the long-term viability or sustainability of schools and guide the management of school space and that all of this work be aligned with the planning principles within the current Ten-Year Facilities Plan.

The administration is presently reviewing and updating the district's current *Ten-Year Facilities Plan (2006 – 2015)* submitted to the Minister of Infrastructure and Transportation in June of this year. Initial work is proceeding with the preparation of the district's new Ten-Year Facilities Plan for the forthcoming ten-year period, 2007 – 2016. There are two distinct phases in the district's annual cycle of work in this regard:

- **Preparation** of the district's long-range, Ten-Year Facilities Plan for each succeeding ten-year period; and

- **Implementation** of the district's long-range plan through the preparation and submission to the province of the district's Three-Year Capital Plan, identifying the district's capital priorities over a three-year period, and the preparation of a district Annual Implementation Plan, identifying strategies and initiatives to be undertaken by the district at individual schools or groupings of schools each year to support school sustainability and the effective management of student space.

New Components Added to the Plan

Following from the district's previous Ten-Year Facilities Plan, it is proposed that, when drafted, the updated plan feature the addition of these key components:

- a. Profile of the viability of all schools district-wide;
- b. Definition of functions (e.g. alternative or special education program site, decentralized administration, partnership, etc.), for individual schools locally and within the district and the identification of strategies aimed at supporting viable schools so that they are able to fulfill their functions into the future in a sustainable way;
- c. Provision within the district's Ten-Year Facilities Plan for a Annual Implementation Plan to be prepared annually following the approval, by the Board of Trustees, of the district's ten-year plan;
- d. Process for School Sustainability Reviews within every Annual Implementation Plan, providing for the closer examination of schools for which the issue of viability might be open to some question;
- e. Process for consultation with stakeholders in the *preparation* of the district's Ten-Year Facilities Plan, including consultation on:
 - the district's planning principles;
 - viability indicators; and
 - plan outcomes.
- f. Processes for consultation with stakeholders in the *implementation* of the district's Ten-Year Facilities Plan, including consultation with respect to:
 - School Sustainability Reviews;
 - school attendance area adjustments;
 - the placement and/or relocation of district programs;
 - space reduction initiatives (e.g. through leases, partnerships, partial demolitions, etc.);
 - school closures; and/or
 - any other initiative or strategy recommended within the Ten-Year Facilities Plan and proposed through the district's Annual Implementation Plan.

Framework of the Plan

Previous Ten-Year Facilities Plans have focused on the issues of population and demographics within the City of Edmonton and declining enrolments and surplus student space within district schools as the primary challenges confronting the district. The proposed

plan will address these issues together with the issues of district program distribution and student transportation since it is recognized that solutions to all of these issues need to be explored together using an integrated approach.

Schematic Overview of the Plan

A schematic overview of the Plan's process describing how, in the work of managing student space effectively and efficiently, the challenges confronting the district fall into the four key areas of *Population and Demographics*; *Student Space*; *Placement of Programs*; and *Student Transportation* is presented in Appendix I. The schematic diagram illustrates how the plan guides the district's work of ensuring that viable schools are sustainable within all sectors, clarifying functions for all schools within the district and identifying strategies intended to support sustainability and the efficient management of student space. The diagram further illustrates how functions and strategies at existing school facilities also need to be considered together with the expected functions and ongoing strategies for new schools as they are built.

Finally, within the context of the district's planning principles, functions and strategies at all schools need to be implemented in an integrated manner to ensure that district-wide challenges continue to be appropriately addressed.

School Viability, Functions and Strategies

A table profiling the viability, functions and strategies of individual schools within the district is presented in Appendix II. The table demonstrates that indicators of school viability exist within the district's four key areas of challenge and that they need to be considered together with local indicators such as the community use of schools. Through the examination of individual school viability, the function of school facilities and appropriate strategies to support sustainability and the efficient management of student space at each school may be determined. Functions and strategies may vary over time and, for that reason, they must be considered and defined within the plan's ten-year timeframe in increments of 1 – 3 years, 4 – 6 years and 7 – 10 years. In this manner, schools, parents and communities should have a relatively clear understanding of the status all district schools from year to year.

School Viability Indicators

A list of possible indicators of individual school viability is presented in Appendix III. Viability indicators are intended to assist the district in identifying the function that an individual school facility may have locally or within the district. Indicators are also intended to help identify appropriate strategies to support the sustainability of a school in its defined function and support the school in addressing particular local or district challenges (e.g. declining enrolments, facility operating and maintenance costs, program and/or transportation issues). The indicators listed in Appendix II are presently in draft form and are for discussion purposes only. It is intended that the district will consult with stakeholders on these indicators to ensure that they receive the broadest support.

Process and Timelines

A process and timeline for the review and preparation of the district's proposed *Ten-Year Facilities Plan (2007 – 2016)* with final approval by the Board of Trustees in late March 2006 is outlined in Appendix IV. The process provides for the input of stakeholders both in the development of school viability indicators and later in the review of a draft of the plan prior to its final approval by the Board. The process also provides for the preparation of the district's Three-Year Capital Plan and Annual Implementation Plan as the initial steps in the implementation of the Ten-Year Facilities Plan. It is important to note that this work is cyclical, undertaken and completed by the district each year. The work of preparing both of these plans will be undertaken by the administration following the Board's approval of the Ten-Year Facilities Plan in March each year and it will be completed before the end of June.

The district's Three-Year Capital Plan will identify the districts capital priorities over a three-year period and, following its approval by the Board of Trustees, it will be submitted to the province as a request for their capital support for district projects such as the upgrading of existing schools and the construction of new schools where they are needed. The district's Annual Implementation Plan will be provided to the Board of Trustees as information. Its purpose will be to outline the scope of work and timelines, commencing in the fall of each year, with regard to the strategies and initiatives recommended for individual schools or groups of schools within the Ten-Year Facilities Plan. These strategies and initiatives may include such things as school closure, the placement or relocation of programs, space reduction initiatives or any other course of action identified and recommended within the Ten-Year Facilities Plan. The Annual Implementation Plan will also outline the decision-making process in the case of each strategy or initiative and it will provide details concerning how and when the input of stakeholders will be incorporated.

School Sustainability Review

A proposed outline and process for a School Sustainability Review is presented in Appendix VI. Based on the consideration of the viability of schools within the district's Ten-Year Facilities Plan, a School Sustainability Review at any individual school or grouping of schools may be a recommended strategy identified within the Annual Implementation Plan. If proposed, a School Sustainability Review would commence as early as possible in the fall. With the completion of a School Sustainability Review, the administration would prepare and submit a final report, with recommendations, to the Board of Trustees for its approval.

Stakeholder Consultation

In the preparation of the Ten-Year Facilities Plan, the Planning Department will work with the Communications Department over the coming months to consult with schools and school councils on the following issues [see *Appendix IV: Process and Timeline for Preparation of Ten-Year Facilities Plan (2007 – 2016)*];

- a. ***Planning Principles*** – Further consultation with stakeholders with respect to the district's planning principles is important in order to ensure that they remain current and relevant in providing the district with a sound framework for planning and decision-making around student accommodation, program distribution and the management of student space.

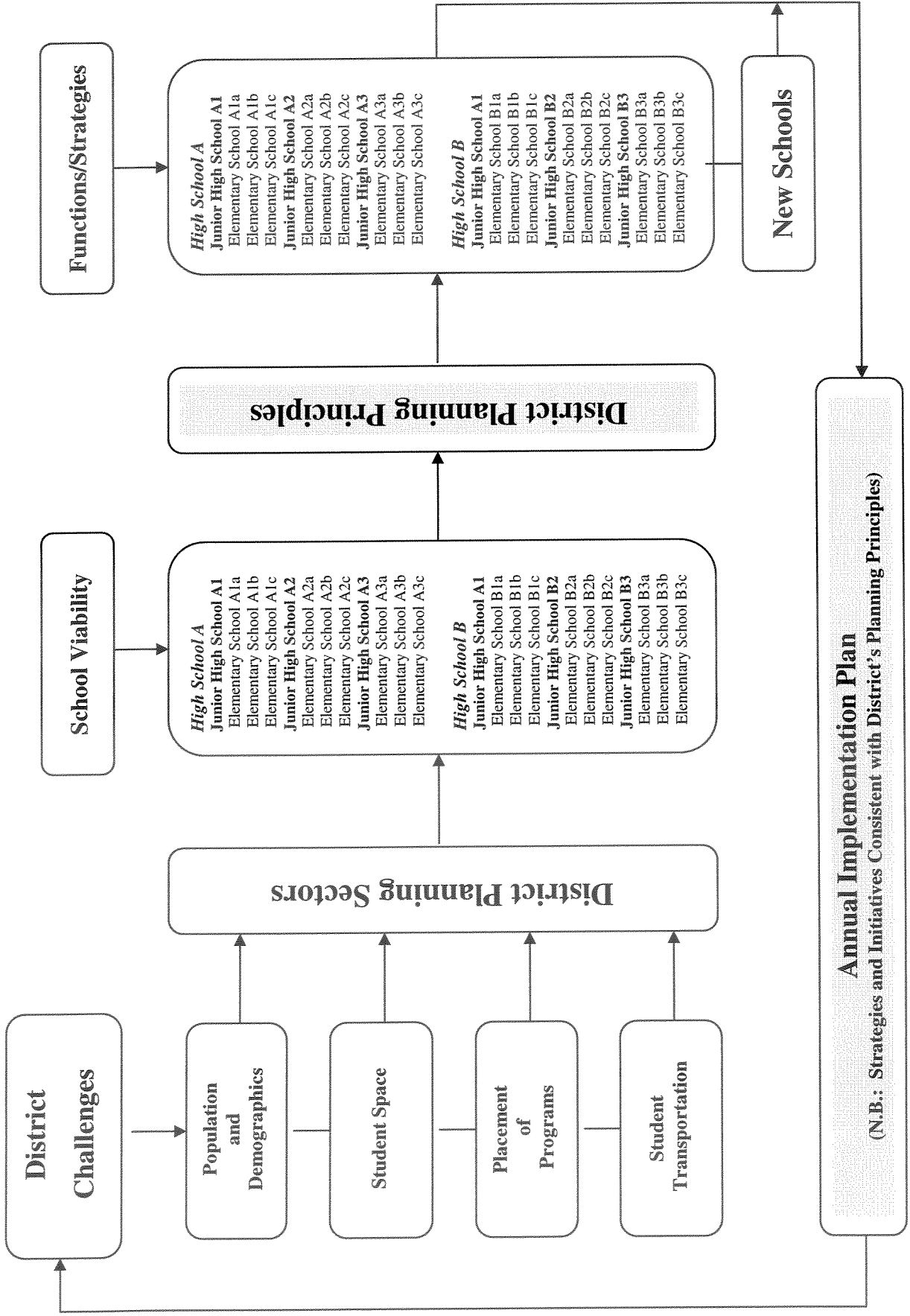
- b. *School Viability Indicators* – Consultation with stakeholders on the indicators of school viability is essential in order to ensure that they receive the broadest support. School viability indicators, when considered together, help the district to begin to define a quality learning environment for students.
- c. *Plan Outcomes* – It is important that the district consult with stakeholders on the range of possible strategies and initiatives identified within the Ten-Year Facilities Plan to ensure that the outcomes identified are appropriate in addressing the district’s challenges and whether or not there may be other outcomes that could be considered. The process for consultation that is being considered in this first phase would involve trustees meeting in wards: possibly two wards together with school councils and principals from schools in the area. This process will be further developed by the administration in consultation with the communications department.

In addition, the district will also provide stakeholders with information regarding the draft of the Ten-Year Facilities Plan and the functions and strategies identified for individual schools. Stakeholders will also provide input into the local conditions section of the school viability indicators. This process will occur after the Plan has been drafted by the administration and before it is presented to the Board for final approval in March 2006.

RL:cp

APPENDIX I	Schematic Overview of Proposed Ten-Year Facilities Plan (2007 – 2016)
APPENDIX II	Profile of School Viability – Facility Functions and Strategies
APPENDIX III	School Viability Indicators (Draft)
APPENDIX IV	Process and Timeline for Preparation of Ten-Year Facilities Plan (2007 – 2016)
APPENDIX V	Proposed Outline and Process for School Sustainability Reviews

Schematic Overview of Proposed Ten-Year Facilities Plan (2007 – 2016)



PROFILE OF SCHOOL VIABILITY – FACILITY FUNCTIONS AND STRATEGIES

Schools	School Viability Indicators				Facility Functions			Facility Strategies				
	Learning Conditions	Demographics	Student Space	Program Distribution	Student Transportation	Local Indicators e.g. Community Use of Schools	1-3 Yrs.	4-6 Yrs.	7-10 Yrs.	1-3 Yrs.	4-6 Yrs.	7-10 Yrs.
High School A												
Jr. High School A1												
Elem. School A1a												
Elem. School A1b												
Elem. School A1c												
Jr. High School A2												
Elem. School A2a												
Elem. School A2b												
Elem. School A2c												
Jr. High School A3												
Elem. School A3a												
Elem. School A3b												
Elem. School A3c												
High School B												
Jr. High School B1												
Elem. School B1a												
Elem. School B1b												
Elem. School B1c												
Jr. High School B2												
Elem. School B2a												
Elem. School B2b												
Elem. School B2c												
Jr. High School B3												
Elem. School B3a												
Elem. School B3b												
Elem. School B3c												

Facility Function	Facility Strategy
1 Support Local Area Regular Enrollment	A Status Quo – No specific plans
2 Support Bussed Program Enrollment	B Facility Lifecycle Exceeded
3 Alternative/Special Education Program Site	C Investigate Extent of Upgrade Required
4 Function/Use TBD (Sustainability Review Required *)	D Undertake Repairs/Upgrade
5 De-centralized Administration	E Potential Partial Demo
6 Lease	F Potential Replacement
7 Partnership	G Consider Suitability for Program
8 Disposition	H Sustainability Review Required *

* Consultation Required

School Viability Indicators (Draft)

1. Learning Conditions

- Class Size
- Class composition
- Learning Support
- Availability of non-core courses
- Availability of staff expertise
- Availability of co-curricular and extra curricular activities
- Learning resources

2. Population and Demographics

- Historical local resident school-aged population (i.e. past 10 years);
- Current local resident school-aged population (i.e. local area only; does not include students from designated neighbourhoods);
- Projected local resident school-aged population (i.e. next 10 years);
- Historical local resident EPS school-aged population (i.e. past 10 years);
- Current local resident EPS school-aged population (i.e. excludes supporters of Edmonton Catholic and other jurisdictions);
- Projected local resident EPS school-aged population (i.e. next 10 years);
- Current local resident EPS school-aged children enrolled in regular program at school;
- Enrolment history at school profiled (i.e. past 10 years).

3. Student Space

- Facilities expected serve lifespan;
- Capital invested;
- Cost to upgrade;
- Optimal enrolment (core building);
- Optimal enrolment (total, including pods and/or portables);
- Number of student spaces supported by PO&M funding divided by the total number of student spaces in the school;
- Comparison of funds received per students for PO&M and the total amount of space needing to be maintained in the building; and
- Available funding per square meter resulting from the above.

4. Placement of Programs

- Regular Programs
 - Total enrolment
 - Enrolment (Kindergarten);
- Alternative Programs
 - Total enrolment
 - Enrolment (Kindergarten)
 - School's location relative to where students live
 - Efficient use of facility (i.e. core vs. pod/portable);

- Special Education
 - Students with *Mild/Moderate* special needs living in attendance area vs. enrolled;
 - Students with *Severe* special needs living in attendance area vs. enrolled;
 - Balance with Regular and Alternative Programs.

5. Student Transportation

- Accessibility (i.e. ease of access by yellow bus, including considerations of safety);
- Efficiencies (i.e. cost, ride times, etc.);
- Demand (i.e. existing and potential ridership);
- Carrier capacity;
- Obligations (i.e. legislative and policy);

6. Local Conditions

- Community Use of School
- Leases
- Partnerships

Edmonton Public Schools
Planning Department
December 2005

Process and Timeline for Preparation of Ten-Year Facilities Plan (2007 – 2016)**1. Preparation of Ten-Year Facilities Plan**

- a. Internal Review Fall 2005
- Planning Department
 - Review existing plan, draft outline for new plan and develop plan process.
 - Senior Administration
 - Review and provide input into draft outline and process for new plan.
 - Board of Trustees (Conference Committee – Report for Information)
 - Review and provide input into draft outline and process for new plan.
 - Board of Trustees (Public Board meeting – Report for Information).
 - Receive information report titled “Draft Outline and Process for Ten-Year Facilities Plan (2007 – 2016)”.
- b. Stakeholder Consultation (Ten-Year Facilities Plan) Jan. – Feb. 2006
- Identified stakeholder groups.
 - Consult on Planning Principles, indicators of school viability and possible plan outcomes (i.e. strategies/initiatives).
- c. Preparation of Draft Ten-Year Facilities Plan (2007 – 2016) Jan. – Feb. 2006
- Planning Department
 - Consider stakeholder input in work to draft new plan.
- d. Stakeholder Consultation (Ten-Year Facilities Plan) Feb. 2006
- Identified stakeholder groups.
 - Review and consult on draft of new plan.
 - Provide stakeholders (i.e. individual School Councils) with opportunity to confirm “local conditions” within draft of new plan.
- e. Final Plan Revisions Mar. 2006
- Planning Department
 - Consider all stakeholder input and incorporate revisions into draft of new plan.
- f. Plan Approval Mar. 2006
- Board of Trustees (Public Board meeting)
- g. Submission of Ten-Year Facilities Plan (2007 – 2016) Mar. 2006
- Planning Department
 - Submit Plan to Provincial Government

2. Implementation of Ten-Year Facilities PlanApr. – May 2006

- a. Three-Year Capital Plan (2007 – 2010)
- Plan preparation
 - Planning Department
 - Plan approval (Three-Year Capital Plan) May 2006

- Board of Trustees (Conference Committee) and (Public Board)
- Plan submission to Provincial Government May 2006
- Planning Department

b. Annual Implementation Plan Apr. – May 2006

- Planning Department prepares draft of Annual Implementation Plan outlining processes and timelines for stakeholder consultation, authorities for approval and intended scope of work (i.e. including all expected outcomes) with regard to each of the strategies and initiatives for schools identified in Ten-Year Facilities Plan.
- Stakeholder Consultation (Annual Implementation Plan) May – June, 2006
 - Identified stakeholder groups.
 - Consultation on draft of Plan (i.e. processes and timelines, authorities for approval, intended scope of work and expected outcomes).
- Final Plan Revisions (Annual Implementation Plan) June 2006
 - Planning Department considers all stakeholder input and incorporates revisions into draft of Plan.
- Final Plan (Annual Implementation Plan) June 2006
 - Board of Trustees (Conference Committee) and Board of Trustees (Public Board for Information)

3. Implementation of Strategies and Initiatives Sept. 2006 – June 2007

a. Strategies and Initiatives

- Planning Department
 - Initiate work of implementing Ten-Year Facilities Plan (2007 – 2016) in accordance with direction provided within the Annual Implementation Plan, approved by Board of Trustees (June 2006). Among others, strategies and initiatives could include plans or studies to consider school closure, school consolidation, replacement schools, etc., attendance area changes, the location and/or relocation of district programs, the examination of issues regarding student transportation (and consideration of options) and possible space reduction initiatives (e.g. portable/pod dispositions, leases, partnerships, partial demolitions, etc.).

b. Stakeholder Consultation

- Identified stakeholder groups.
 - Consultation included in process around strategies and/or initiatives at the school, sector or district level in accordance with the direction provided within the Annual Implementation Plan.

Proposed Outline and Process for School Sustainability Reviews

Based on the consideration of the viability of schools within the district's Ten-Year Facilities Plan, a School Sustainability Review at any individual school or grouping of schools may be a recommended strategy proposed within the Annual Implementation Plan. A School Sustainability Review would be identified within the Annual Implementation Plan as a district strategy and it would commence as early as possible in the fall. With the completion of a School Sustainability Review, the administration would prepare and submit a final report, with recommendations, to the Board of Trustees for its approval.

Specific information to be considered within a School Sustainability Review could include:

1. Enrolment and Demographic Information

- Current enrolment;
- Enrolment history (5 year);
- Enrolment projections (5 year);
- Demographics of where students reside;
- Residential development, potential in school's attendance area; and
- City of Edmonton population forecasts.

2. Program Information

- Programs offered in the school;
- Class/grade configurations; and
- Programs offered in surrounding schools and in the sector.

3. Facility/Learning Space Use Information

- Capacity of the school (internally calculated using the space inventory system);
- Facility audit assessment (facility operation costs, projected capital costs);
- Inventory of space use for instruction, including floor plans; and
- Ownership of facility and land.

4. Human Resources

- Staff allocation; and
- Certified staff, support staff, custodial staff, exempt staff.

5. Financial

- School-based salary and benefit costs;
- Plant operating costs;
- Plant maintenance and capital costs;
- Transportation costs; and
- Subsidies being accessed by the school (small school subsidy, others).

6. Community Impact

- After school and evening user groups;
- Existing tenants, partnerships and leases in the building;
- Access to existing playgrounds, recreational areas and playing fields; and
- Proximity of closest public schools in sector.

7. Transportation

- Current transportation situation, arrangements and services;
- Number of students requiring busing to get to school along with ride times; and
- Accessibility to Edmonton Transit System (ETS) if applicable.

8. General Information

- Local conditions;
- Future capital plans in the sector;
- New schools planned in the sector; and
- Additional relevant issues identified during the review process.

Edmonton Public Schools
Planning Department
December 2005