

EDMONTON PUBLIC SCHOOLS

November 9, 2004

TO: Board of Trustees

FROM: A. McBeath, Superintendent of Schools

SUBJECT: District Space Utilization and Accommodation Strategy

ORIGINATOR: A. Habinski, Executive Director, School and District Services

RESOURCE

STAFF: Randy Billey, Michael Ediger, Andrea Furness, Roland Labbe, Randy Leal, Karen Linden, Deanne Patsula, Cindy Skolski

INFORMATION

The purpose of this report is to familiarize trustees with issues faced by Edmonton Public Schools related to space utilization, and the education and accommodation of students. Included is an outline of strategies that the administration will use to address these issues in both the short and long term. This report will provide a context for specific action recommendations that will be presented to board over the next months.

Background

Capital planning and accommodation planning for Edmonton Public Schools are guided by the district's Ten-Year Facilities Plan. This plan, which is updated annually and submitted to Alberta Infrastructure together with the district's three-year capital priorities, provides district context and outlines the principles (Appendix I) that underlie planning and decision-making in the areas of capital planning, student accommodation, program distribution and student transportation. The 2005 – 2014 plan was approved by the board on May 11, 2004.

Issues

A number of factors confront the district in its efforts to ensure both "sustainable facilities" (i.e. high quality learning environments) and "sustainable funding" (i.e. new construction, modernization and ongoing maintenance of schools). The most significant of these factors are outlined below.

1. Student Instruction

The funding structure in our district recognizes that under-utilized schools present unique challenges in providing basic educational programming. While the district provides additional funding through the multiple program allocation (i.e. small school grant), under-utilized schools face two basic challenges in providing educational programming. The first challenge is the fact that these schools are unable to offer the full range of programming that can be offered in larger schools where the population is able to support a more diverse program. The second challenge is the issue of schools having to use

instructional dollars to balance the costs of maintaining and operating the school, further limiting the ability of the school to offer a wider range of programs to students.

2. Space Utilization

The district's current space utilization rate, based on Alberta Infrastructure most recent calculation, is 69 per cent. This is considerably lower than Alberta Infrastructure's overall threshold of 85 per cent which they set as the level qualifying districts across the province to secure funding for new school construction. For a number of years, Alberta Infrastructure has stressed the connection between the district's ability to reduce its inventory of space and its ability to obtain funding for new facilities. Space utilization is also used to determine the amount of funding that the district receives from Alberta Infrastructure for Plant Operations & Maintenance (PO&M). The district distributes PO&M funds to schools to pay for maintenance and custodial services.

In considering funding for new school construction, Alberta Infrastructure relies on a sector model in defining the district's utilization of space. Edmonton Public Schools is divided into nine geographic sectors for this purpose. A tenth sector encompasses the district's twelve senior high schools. Appendix II provides information on the district's enrolment and space utilization by sector.

3. Declining Enrolment

Although the City of Edmonton is one of the fastest growing urban municipalities in the nation, the decreasing fertility rate and other factors are contributing to a trend of decline in the size of the district's annual Kindergarten enrolment. Current projections indicate that, for the next five years and perhaps beyond, declining enrolment will be a challenge for all but a few sectors within the district. However, with district high schools, especially those on the south side of the city, currently at or over capacity, the need for additional high school space is immediate. Appendix III contains the district's enrolment history and five-year enrolment projection.

4. Suburban Growth

Most of the growth in Edmonton's population is occurring in the city's suburban areas. There are currently over 45 new and developing neighbourhoods in the city. This means that the demand for new school construction in the suburban areas will intensify over the next ten years. Eighteen percent of the district's elementary students live in neighbourhoods without a local elementary school.

5. Ageing School Buildings

Edmonton Public Schools currently operates over 200 school buildings with an average age of 42 years. Obtaining sufficient modernization funding to ensure that these buildings provide appropriate learning environments is a major challenge.

Strategies

It is evident that obtaining sufficient provincial funding for new construction and the ongoing maintenance and modernization of existing school buildings is central to any effective accommodation and space utilization strategy. There are a number of approaches which the district can utilize, either singly or in combination, to address the issues described above and contribute to the district's ability to obtain required funding. These strategies are outlined

below. Throughout the 2004-2005 school year, the board will receive recommendations and information regarding the implementation of these strategies.

1. School and Program Closure or Consolidation

The closure of low-enrolment or under-utilized schools and programs is one method for reducing the district's inventory of excess capacity and reducing the amount of money that must be spent to maintain, light and heat unneeded space. School and program consolidation, while similar to school closure, can sometimes achieve efficiencies through combining and redistributing programs, without necessarily resulting in the closure of buildings.

2. Demolition of Excess Space

In some older areas of the city, school enrolments have declined, but there is still a need for school space. The demolition of excess space for the purpose of "right-sizing" is another means of addressing the "too few students in too much space" dilemma. Where pods and portable classrooms are deemed to be no longer needed, their removal or demolition is also a way of reducing capacity in schools so that current and projected enrolments can be more appropriately reflected. Demolition, however, is a costly process and it still requires provincial approval and funding as does any disposition of portable space.

3. Partnerships with Private and Public Sector

Edmonton Public Schools has been a leader in the use of partnerships to acquire new facilities and make better use of existing ones. George P. Nicholson School is an example of a partnership between the district, Capital Health and the YMCA. The Victoria School modernization is being carried out with a significant partnership contribution from Capital Health. There are other examples in district schools of space being acquired by partners such as Capital Health, the Conseil Scolaire Centre-Nord and the Edmonton School Health Initiative Partnership (ESHIP).

All of these examples result in the district being able to achieve more efficient space utilization while providing space to other agencies whose purpose is to benefit families and children.

To date, Edmonton Public Schools has not entered into a partnership with a private agency. Considerable research has been done into the possibilities and implications of such partnerships. The administration will continue to investigate approaches used in other cities and provinces to determine if these partnerships may have potential within the district.

4. Alternate Procurement Methods

Over the last number of years, the district has investigated a variety of alternate means of obtaining new schools, including developer-built schools in newly-developing neighbourhoods. To date, there have been no schools built in Edmonton through such partnership arrangements. Alberta Infrastructure, while supportive of the concept of partnerships, has consistently indicated to Edmonton Public Schools that the method of procuring new facilities is not as relevant as whether the new facilities can be justified based on the utilization rate of the district's existing space.

Preliminary investigation has also occurred with respect to the use of surplus school lands as a source of revenue for funding new construction. This work is in its early stages and, at this time, provisions allowing school districts this kind of flexibility do not clearly exist within the Municipal Government Act and the by-laws and policies of the City of Edmonton.

Process and Desired Outcomes

Within the district's current three-year capital plan, several school clusters have been identified with recommendations for their further study in order to ensure that capital funds fully benefit communities and, in particular, the students who reside within those communities. Priority has been placed on this approach in order to preserve consistency with the district's planning principle of ensuring the provision of "equitable access to quality learning environments and choice of programs" so that:

- 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; and
- 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.

As with past work undertaken by the district through Concept Development Studies, it will be imperative that parents and members of the community be extensively and meaningfully engaged in the identification of issues and needs, the development of criteria for the evaluation of options and in the review of all considered alternatives. If school closure is considered to be a desired outcome, the district's implementation of any strategies in that regard must ensure that students end up being accommodated within enhanced facilities that are in close proximity.

Next Steps

- Before the end of November, the administration will present to the board, information with respect to the further examination of schools and programs with low enrolment and/or low space utilization. Through a process of consultation with parents, staff and the public, this work will focus on clusters of schools in order to build common understanding around increased benefits to students and student programming through improved utilization. These efforts could culminate in recommendations for school or program closure. Such recommendations would then result in the district undertaking the formal school closure process (Appendix IV) prior to a board decision.
- The current three-year capital plan contains a request for the funding of eight demolition projects (i.e. including the demolition of 15 four-classroom pods) in the 2005-2006 school year (Appendix V). The administration will continue to advocate with Alberta Infrastructure for funding to complete these projects and will investigate further opportunities to improve district space utilization through the 'right-sizing' of schools. It should be noted that emergent funding from the district's request for capital in the 2005-2006 school year has been received from Alberta Infrastructure for the demolition of one four-classroom pod at Homesteader School and this work is expected to be completed early in 2005.

- Investigation of future partnership possibilities will continue. The administration will also pursue opportunities for sharing existing space with other providers of services to children and families, including government departments. Possible future partnerships with the private sector, related to new schools, will also be explored along with the administration's efforts in actively pursuing amendments to the Municipal Government Act and relevant city policies in order to make such arrangements possible. The board will be informed of any potential initiatives.

RL:FP:pn

APPENDIX I:	Capital and Accommodation Planning Principles
APPENDIX II:	Enrolment and Capacity by Sector
APPENDIX III:	Edmonton Public Schools' Enrolment History and Five-Year Projection
APPENDIX IV:	School Closure Policy
APPENDIX V:	Space Reduction Initiatives: 2005-2008 Capital Submission

CAPITAL AND ACCOMMODATION PLANNING PRINCIPLES

(from the *Ten-Year Facilities Plan 2005-2014*)

Equitable Access to Quality Learning Environments and Choice of Programs

1. Students at all grade levels will have equity of access to high quality, modernized facilities wherever they live in the city.
2. A balanced range of regular, alternative and special education programs will be provided within each sector.
3. 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.

Creative Re-Use of Surplus Space

1. Surplus school space that is viable and has value to the community should be identified for potential partnership use.
2. Partnership agreements will be at no cost to the district.

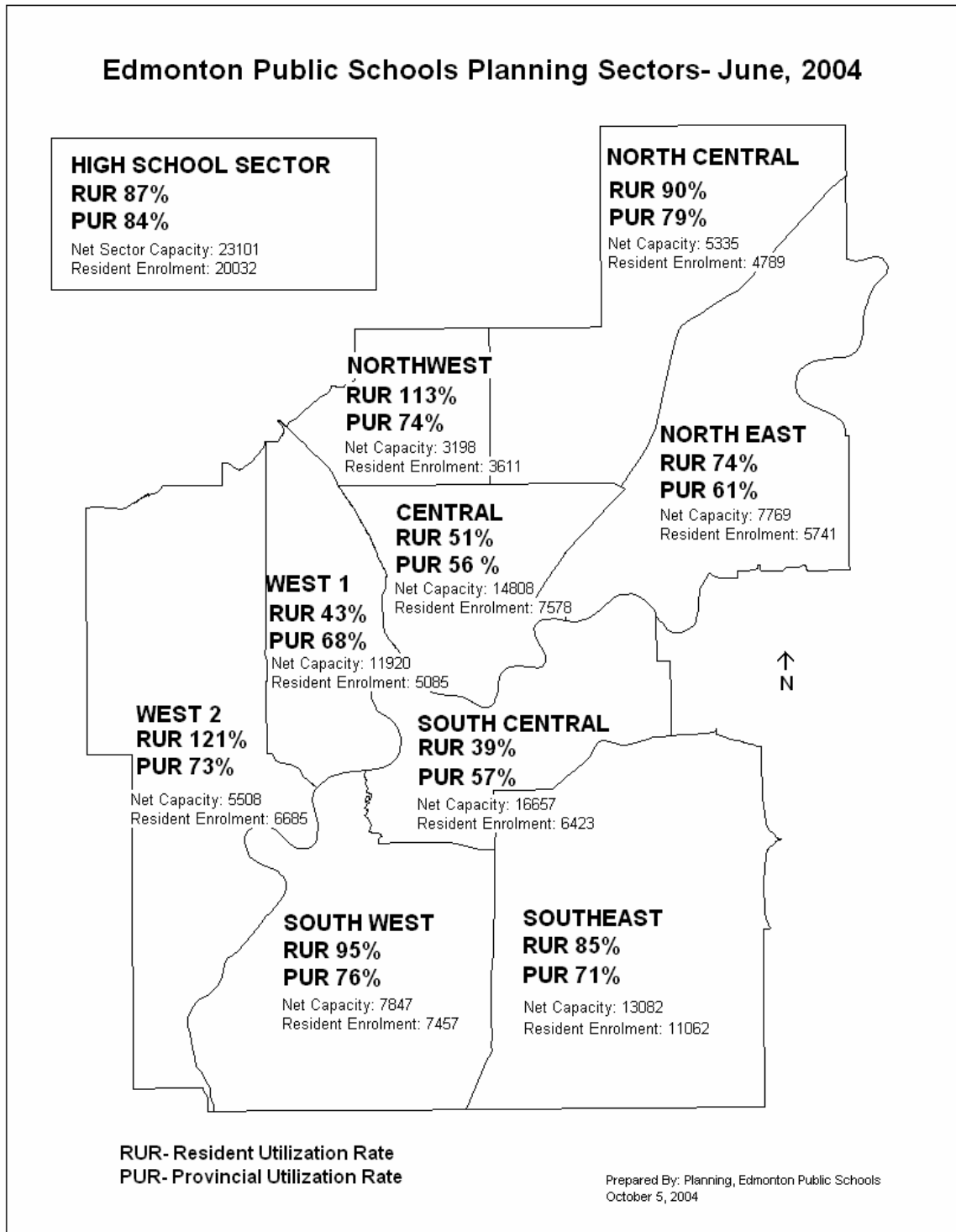
Efficient Sector Utilization and Retention of Small Schools

1. In low utilization sectors, 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.
2. The process will lead to retention of smaller schools in neighbourhoods, although consolidation, rightsizing or closure may be required where enrolment is no longer viable.
3. 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.
4. The process will reduce the dependency on designated receiving schools and long ride times.
5. Consideration will be given to upgrading receiving schools identified as a result of school or program closure.

Accommodation and Program Needs Met Within Sectors

1. Where possible, student needs for programs will be met within the student's resident sector.
2. 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.
3. The need to provide new schools in growth areas of the city is affirmed.

ENROLMENT AND CAPACITY BY SECTOR



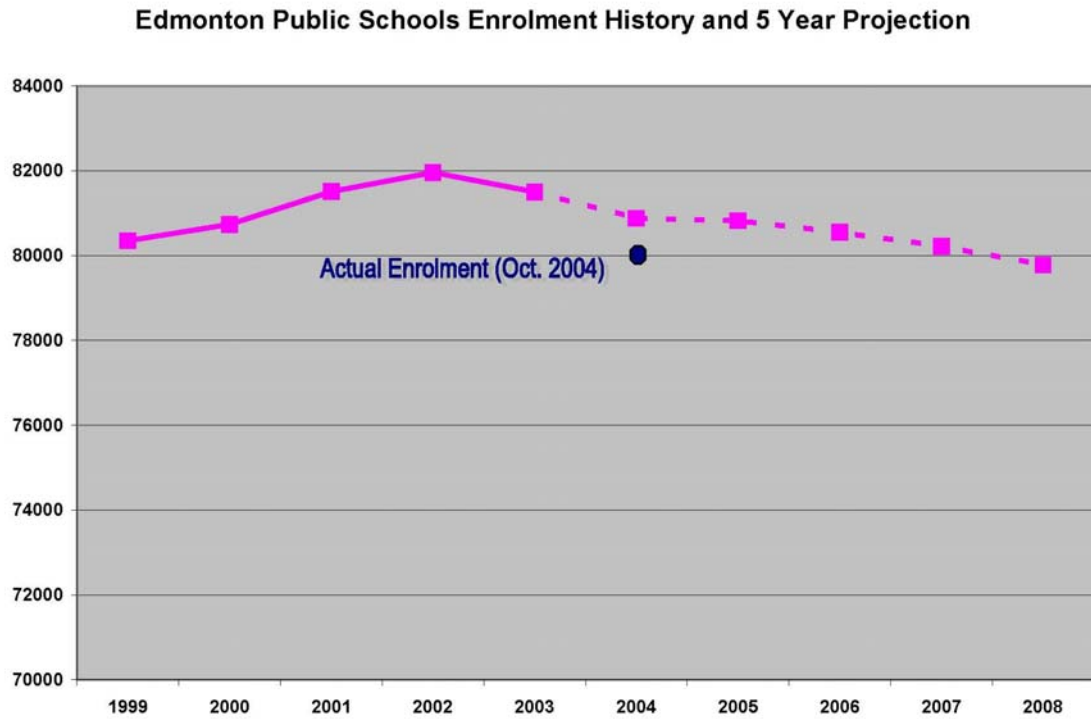
N.B.

“Resident Utilization Rate” is the number of students residing in the sector divided by available capacity

“Provincial Utilization Rate” is the number of students attending school in the sector divided by available capacity

APPENDIX III

EDMONTON PUBLIC SCHOOLS ENROLMENT HISTORY AND 5 YEAR PROJECTION (AS OF DECEMBER 2003)



Actual Enrolment ————

Projected Enrolment - - - - -

SCHOOL CLOSURE POLICY

Edmonton Public Schools Board Policies and Regulations

CODE: FL.BP
TOPIC: School Closure

EFFECTIVE DATE: 11-09-2001
ISSUE DATE: 25-09-2001
REVIEW DATE: 09-2006

The board believes that the closure of schools is an important consideration in ensuring the responsible use of the resources placed in its trust; making efficient use of the district's school space; and safeguarding the health and safety of students, staff, and the public.

A. SCOPE AND AUTHORITY

1. The board reserves to itself the authority to close an entire school or three or more consecutive grades in a school.
2. The board authorizes the administration, under the direction of the superintendent of schools and with appropriate consultation, to:
 - a. close or permanently relocate fewer than three consecutive grades in a school, or
 - b. temporarily relocate any number of grades from one school to another.
3. Discontinuance of a special needs program or an alternative program is not considered a school closure and is addressed in HA.BP Student Programs.

B. CRITERIA FOR SCHOOL CLOSURE

An entire school or three or more consecutive grades in a school may be considered for closure if one or more of the following criteria are met:

1. Total enrolment as of September 30 in the current school year is below the following levels:
 - a. elementary (K to 6) - an average of 15 students per grade, or
 - b. junior high (7 to 9) - an average of 30 students per grade, or
 - c. senior high (10 to 12) - an average of 120 students per grade.
2. The space utilization rate as defined by the provincial government as of September 30 in the current school year is less than 40 per cent.
3. The cost of keeping the school in operable condition or restoring it to operable condition is deemed by the board to be unreasonably high.
4. Closing the school is deemed by the board to be necessary to safeguard the health and safety of students, staff, or the public.

5. Parents and guardians of a majority of students enrolled in the school on September 30 in the current school year agree that closure should be considered.

C. PROCESS FOR SCHOOL CLOSURE

1. Where the board is considering school closure, it shall raise the matter through notice of motion at a regular board meeting, and ensure that the following are carried out:
 - a. A written communication, the contents of which are consistent with policies established by Alberta Learning, is sent to the parents of every student enrolled in the school who, in the opinion of the board, would be significantly affected by the closure of the school.
 - b. A public meeting is held, with at least a simple majority of trustees present.
 - c. The time, date, and place of this meeting are publicized in accordance with policies established by Alberta Learning.
 - d. The City of Edmonton is provided an opportunity to provide to the board a statement of the impact the closure may have on the community.
2. Following the public meeting attended by trustees, there shall be a period of at least three weeks for parents and community members to present to the board further responses to the proposed closure.
3. The administration may hold additional public meetings, consult with parents at other schools, or provide other opportunities for public involvement as appropriate, at any time.

Reference(s):

[HA.BP](#) - Student Programs

[School Act](#) Section 58

Alberta Learning's [Closure of Schools Regulation](#)

[Alberta Infrastructure](#)- see School Capital Manual 2002-2003 Section 5.2.1 Utilization Rate and Section 5.2.2. Area, Capacity and Utilization Procedures

SPACE REDUCTION INITIATIVES: 2005-2008 CAPITAL SUBMISSION

(From *Three-Year Capital Plan 2005-2008*)

Space Reduction Initiatives

N.B.: *Should funding for space reduction initiatives be made available by Alberta Infrastructure through the definition of a new, separate and distinct category apart from the existing "Preservation" and "Expansion" funding categories, the following projects would be proposed to be undertaken as soon as possible. They are therefore identified within this capital plan as Year 1 priorities, emphasizing the district's committed interest in rationalizing its use of space and reducing costs. The district is further committed to the work of identifying similar initiatives as capital priorities each year in future capital plans.*

Year 1 (2005 – 2006)

Space Reduction Initiatives

Belvedere School Annex (13359 – 62 Street) - Partial demolition	\$192,000
Horse Hill School (19355 Meridian Road) - Partial demolition	\$378,000
Parkallen School (6703 – 112 Street) - Partial demolition	\$284,000
Richard Secord School (4025 – 117 Street) - Partial demolition	\$244,000
Ritchie School (9750 – 74 Avenue) - Partial demolition	\$713,000
Hardisty School (10534 – 62 Street) - Partial demolition	\$609,000
Strathearn School (8728 – 93 Avenue) - Partial demolition	\$196,000
Pod Demolition - Demolition of 15 pods	\$500,000

Cost of Year 1 (2005 – 2006) Space Reduction Initiatives: \$3,116,000