

DATE: March 19, 2019

TO: Board of Trustees

FROM: Darrel Robertson, Superintendent of Schools

SUBJECT: District *Three-Year Capital Plan 2020-2023*

ORIGINATOR: Dr. Lorne Parker, Assistant Superintendent

RESOURCE STAFF: Josephine Duquette, Terri Gosine, Geoff Holmes, Kim Holowatuk, Scott Humphrey, Hodan Jama, Roland Labbe, Valerie Leclair, Maegan Lukian, Kyle McFarlane, Garry Padlewski, Shaminder Parmar, Crystal Plante, David Sloan, Jennifer Thompson, Christopher Wright

REFERENCE: [Infrastructure Planning Principles Policy \(EA.BP\)](#); [Environment Policy \(EO.BP\)](#); [District Strategic Plan 2018-2022](#); [Ten-Year Facilities Plan 2015-2024](#); [Amendment to the Three-Year Capital Plan 2019–2022](#); [Alberta School Capital Manual - March 2015](#);

ISSUE

The District's Three-Year Capital Plan requires annual approval by the Board of Trustees (Attachment I). The deadline for submission of the *Three-Year Capital Plan 2020–2023* to Alberta Education is April 1, 2019.

BACKGROUND

Edmonton Public Schools has realized or is in the process of completing seven school capital projects approved from previous Three-Year Capital Plans. This includes four new schools, one school modernization/addition/demolition and two replacement schools.

Infrastructure Planning Principles Policy

In September 2013, the Board of Trustees approved the Infrastructure Planning Principles to guide capital, facility and student accommodation planning. The principles are as follows:

1. Accountability
2. Centres for Educational Excellence
3. Environmental Stewardship
4. Equitable Access
5. Fiscal Responsibility
6. Service to Community
7. Supports for the Whole Child

District Strategic Plan 2018–2022 Priorities

The Strategic Plan sets the direction for the District, guiding initiatives from 2018 to 2022. The goals for each of the three priorities respond to students' needs and community expectations while laying a strong foundation for ongoing educational and organizational success. Priority 2 - Provide welcoming,

high quality learning and working environments and Goal 2 - Quality infrastructure for all emphasize that the quality of the District's infrastructure provides a foundation for high quality teaching and learning. This includes buildings and the systems that support those buildings (such as communication and transportation networks). High quality infrastructure allows staff to work more effectively, in the process ensuring our students are provided high quality learning environments.

District Infrastructure Plan

The Infrastructure Planning Principles guide the District Infrastructure Plan, which is aimed at transforming the District's inventory of infrastructure assets to ensure 21st Century Learning Environments are available for all students. The plan identifies timelines and goals, responds to community needs, addresses deferred maintenance, and right sizes District space to more efficiently meet short-term and long-term needs. The desired outcomes of the District Infrastructure Plan are to:

- ensure the District has sufficient infrastructure to offer high quality learning environments, geographically located to serve District demographics
- align District infrastructure operations to effectively support the District infrastructure Plan
- support asset management plans for all buildings
- ensure sufficient space is available for partnerships and community supports
- be consistent with a sustainable transportation system designed to serve District needs
- demonstrate commitment to continuous evergreening of infrastructure needs beyond 2022
- support financial efficiencies to ensure District funds are directed to the areas that provide benefits for the most students

Ten-Year Facilities Plan

The *Ten-Year Facilities Plan 2015–2024* provides an overview of the District's facilities and identifies long-range facility needs. As per Alberta Education guidelines, the plan provides facility information by sector, enrolment trends and projections, demographic data, facility condition information, current and projected utilization rates and programming opportunities. The plan identifies future modernization and expansion needs and informs the development of the District's Three-Year Capital Plan.

RELATED FACTS

- Based on the Infrastructure Planning Principles and District Strategic Plan, the District Infrastructure Plan guides all decisions regarding District facility infrastructure investment.
- Providing welcoming, high quality learning and working environments for all students is a District priority.
- The province requires a Three-Year Capital Plan be submitted annually and an up-to-date Ten-Year Facilities Plan be available upon request.
- The District has seven capital projects underway that were announced from previous Capital Plans.
- Priorities in this Plan are carried over from the *Three-Year Capital Plan 2019-2022*, as amended October 9, 2018, as needs and conditions remain unchanged and no additional projects have been funded.
- New school construction projects are considered in growing areas where the District is challenged to provide local accommodation to students.
- The District continues to face continued growth pressures in newly developing areas, and draft projections indicate an increase of approximately 3,000 students, or three per cent for 2019–2020 (eighth straight annual increase in that range).
- Additional high school capacity needs are acute and a shortfall of space is imminent.

- Over the past two years, the District has requested 42 modular classrooms from the province to address growth pressures at several schools nearing full or exceeding capacity. The province funded 14. The District used Capital Reserve funds to fund 20. The remaining eight requests remain unfulfilled.
- It is difficult to prioritize new construction projects as each one listed is required to meet the immediate and imminent future demands from new growth areas.
- The District's inventory of aging infrastructure is assessed at \$756,984,958 million in deferred maintenance.
- Addressing the deferred maintenance does not include the cost to repurpose or reconfigure space to meet program needs or deliver 21st Century high quality learning and working environments.
- Space for Students in Mature Communities projects are considered where enrolment and utilization trends are lower and facilities are oversized and/or require significant infrastructure investment.
- It is difficult to rank new construction projects with projects for mature areas as required by the Province given the collective capital needs.
- The Three-Year Capital Plan is one of the best tools the District has to advocate for adequate, stable and predictable funding that will ensure our ability to provide quality infrastructure into the 21st Century.

RECOMMENDATION

That the proposed capital priorities for modernization and new construction identified in the *Three-Year Capital Plan 2020-2023* be approved.

OPTIONS

Based on the information provided in this report, the following options are considered most appropriate:

1. Approve the *Three-year Capital Plan 2020-2023*, as presented for submission to Alberta Education.
2. Approve the *Three-year Capital Plan 2020-2023*, as amended for submission to Alberta Education.

CONSIDERATIONS and ANALYSIS

Capital Planning Methodology

The *Three-Year Capital Plan 2020–2023* outlines the District's capital priorities for the next three-year period. It includes a breakdown of project costs required by facility, and demonstrates that the District has evaluated its ability to deliver the requested projects during the three-year period. Once approved, the priorities are entered into the provincial database system, including copies of Site Readiness Checklists for new or replacement school projects identified in Year 1 of the submission. Alberta Education reviews and prioritizes the District's school capital projects in accordance with their criteria as listed in the *Alberta School Capital Manual, March 2015* (Attachment III): health and safety, building condition, utilization rates, enrolment projections, education program delivery and impact, site readiness and infrastructure performance. The review will also include any additional information provided such as regional plans or partnership opportunities. The *Three-Year Capital Plan 2020–2023* reflects investment in both mature areas and new growth areas in the District's capital priorities.

New Construction Considerations

All requests for new construction are located in developing neighbourhoods, with most being in the southwest, southeast and west areas of the City. Schools serving these areas are currently experiencing high utilization rates and more students are projected to be generated from the ongoing development.

While the District has been fortunate to receive and open almost 19,000 seats since 2010, the enrolment growth the District has experienced matched this number in the 2017–2018 school year and continues to grow at approximately 3,000 students per year. It is projected that enrolment in K–9 schools will grow by approximately 10,000 students in the next five years, and with only 2,500 additional seats being opened through new construction projects in that same time period. The majority of the projected students will reside in developing areas where schools are at or nearing capacity. Students will continue to be accommodated in schools in mature and established areas where there is some available space. If no new construction is realized, students will face increasing travel times to their designated schools, adding to student transportation challenges for families and the District.

The proposed priorities for new construction and major additions are based on a review of all land development plans, policies and data for the City of Edmonton, and analysis of pre-school and student residency data, including but not limited to:

- number of current students residing in an area and the number of projected students for that area
- the pace of development and the amount of development remaining in an area
- utilization of the schools that the majority of students residing in the area attend
- average distance travelled by the students to their designated school from the proposed site
- the “site readiness” of the proposed site as defined by the Province
- impact of any capacity recently constructed or currently under construction

From 2011 to 2016, according to Statistics Canada, the City of Edmonton total population has grown by 15 per cent. In comparison, Edmonton Public Schools student enrolment has grown 18 per cent in the same time period. Since 2016, Edmonton Public Schools has added over 6,000 more students for a total 26 per cent growth since 2011.

According to the City of Edmonton, the number of residential units has grown quickly and in high volumes in newly developing communities. The majority of this development is in the southwest, southeast and the west areas of the city. In the last five years, 10 developing neighbourhoods grew by more than 1,000 residential units; most were in the south (Chappelle, Allard, Walker Laurel, Windermere, Summerside and the Orchards) with the exception of Rosenthal in the west, and McConachie and Crystallina Nera West in the north. In addition, as of January 1, 2019, the City of Edmonton has annexed almost 8,300 hectares of land south of 41st Avenue SW. The additional land will be available for municipal development in the coming years. This future growth will continue to place enrolment pressures on our schools in the south.

In 2018, Edmonton had 56 developing communities: 21 neighbourhoods were more than 75 per cent or more complete, 16 neighbourhoods were between 50 per cent and 75 per cent complete and 19 neighbourhoods were 50 per cent or less complete. Since these neighbourhoods will near completion in various stages over the next decade, there will be simultaneous need to provide accommodation for students from K–12. If capital funding does not match the pace of development, existing schools that are already highly utilized will face increased organizational and program delivery challenges. To meet the demand for student learning spaces in these areas, students will continue to be designated to schools with space to accommodate them. Many of these schools are aging facilities in established or mature neighbourhoods, located a significant distance away from where these students live.

Student transportation is directly impacted by the simultaneous development of 56 new communities in the City of Edmonton. Every time a new neighbourhood begins to develop, student transportation must

add buses. Often Edmonton Public Schools buses are in these communities before Edmonton Transit Service (ETS) is available. Developing communities do not have a local school at the beginning, or possibly ever, thereby requiring all students be transported to a designated school. Additionally, if a school is located in or near a developing community, students may be unable to safely walk to school due to incomplete sidewalks and roads.

Busing is generally provided to elementary students residing in neighbourhoods where there is no neighbourhood school. Currently, the greatest pressures on these fixed route ride times exist in west, southwest and southeast Edmonton, due to the long distances to designated schools. Edmonton Transit Service is the preferred means of student transportation for junior high and senior high school students. Where ETS to the designated school is not available or does not provide an acceptable level of service, yellow bus service will be provided. The number of yellow bus riders has increased by 4,000 students for the five-year period 2013–2018, or approximately 40 per cent. The greatest pressures on yellow bus ride times in the next year will be for students in developing neighbourhoods (such as Edgemont and Keswick) that are designated to schools in established areas.

Growing enrolment in attendance area high schools led to the development of the High School Accommodation Framework 2016–2019 (the Framework). The Framework has two principle priorities:

1. To effectively respond to current and future student enrolment in highly utilized high schools.
2. To repurpose space to improve efficient use of existing infrastructure in response to underutilized space.

The funding announcement for Dr. Anne Anderson High School in the Heritage Valley area has prompted an update to the Framework.

New construction of high schools is being requested in developing neighbourhoods to increase overall capacity for current and future high school students. Rising spring enrolment targets, a physical expansion, and the Optimal Enrolment Limit (OEL) setting process have maximized the number of high school spaces this year. Even with these additional spaces, coupled with the proposed construction of Dr. Anne Anderson High School, high school space is expected to be fully utilized by 2022–2023. The most acute area of need is in southeast Edmonton, where student residency is larger than the space available.

Modernization/Replacement Project Considerations

The Infrastructure Plan will guide the identification of priorities for future school consolidations, modernization and replacements. Schools that are under consideration for Space for Students in Mature Communities projects will undergo modernization/replacement considerations as a part of the engagement and analysis process. Several factors are used to prioritize modernization/replacement projects including the following:

- current and projected student enrolment
- school utilization
- Building Condition Audits and Deferred Maintenance
- building replacement costs
- Facility Condition Index
- community consultation

The total deferred maintenance is assessed at \$756,984,958 and we do not currently receive enough Infrastructure, Maintenance and Renewal (IMR) funding to address this deficit. This total, in reality, is

underestimated since it only includes the buildings with a recent audit. Deferred maintenance continues to grow every day as the condition of building components continue to deteriorate and new components that fail are added. Adding to the complexity, over 60 per cent of our deferred maintenance is in the mature areas, which is where the fewest number of students reside. However, these spaces still accommodate a large number of programs, both special needs and alternative programs. This space needs to be brought up to current standards or replaced.

Although the District has welcomed the opening of 14 new school constructions over the past three years, school modernizations are also required. Several replacement and modernization projects in core and mature communities are requested in this Three-Year Capital Plan. Modernization projects for District schools are based on the provincial facility condition, utilization and enrolment trends. The District conducted detailed facility condition assessments on many of our schools. These assessments have given a clear indication of the scope of work that is needed to maintain high quality learning environments for schools in core and mature communities. The level of funding that is required to modernize the District's aging infrastructure is higher than what was received in previous years.

All the proposed building modernizations identified are in core or mature communities where the District's oldest buildings are located. Modernizing these buildings will provide improved learning spaces for students living in those school communities, as well as reduce the District's environmental impact and improve operational efficiencies.

Space for Students in Mature Communities

The District's "Space for Students" consultations with community stakeholders in the Greater Lawton and Greater Highlands areas helped the District develop a plan to ensure all students have access to high quality 21st Century learning spaces, regardless of where they live. The Greater Highlands and the Greater Lawton communities underwent a similar consultative process beginning in 2014. In the Greater Lawton area, this resulted in the consolidation of three schools into a new K–9 school. Ivor Dent School welcomed students in September 2017. In Greater Highlands, a concept plan was approved that consolidates Highlands, Montrose and Mount Royal schools into a newly modernized K–9 Highlands School. This project has been funded and is starting the construction phase.

In March 2016, the District began an extensive consultation process with three mature community clusters - Greater Britannia (four schools), Greater Rosslyn (seven schools) and Greater Westlawn (four schools) - around school consolidation concepts. A preferred consolidation concept for the Westlawn cluster was identified and approved by the Superintendent in the spring of 2017. The approved concept will consolidate Afton, Glendale, Sherwood and Westlawn schools into a new K–3 school on the Afton site and a new Grade 4–9 school on the Westlawn site. The Board of Trustees approved an amendment to the *Three-Year Capital Plan 2018–2021* to include this concept in September 2017, and provincial funding was announced for the project in May 2018. Planning and design for the project is now underway.

A preferred consolidation concept for the Britannia cluster was identified and approved by the Superintendent in the fall of 2018. The approved concept will consolidate Brightview, Britannia, Mayfield and Youngstown schools into a new pre K–3 school on the Mayfield site and a new Grade K–9 school on the Britannia site. The Board of Trustees approved an amendment to the *Three-Year Capital Plan 2018–2021* to include this concept in October 2018.

General

Efficient management of Space for Students in Mature Communities projects, new construction opportunities in developing areas, growth of alternative and special education programs and the District's existing resources is a complex task. To continue to provide high quality learning environments and supports for students and community members, the District works closely with its partner organizations where possible. A strong working relationship with partners at the City of Edmonton has contributed to the initiatives in mature and developing communities. The District continues to look for additional opportunities to work with agencies and organizations that support students, their families and the broader community.

The uncertainty of access to capital funding creates challenges in prioritizing projects, for both modernization/replacement schools and new school construction. Funding for modernization projects and capital renewal has been consistently below levels required to maintain high quality learning environments in the District's aging infrastructure. Administration and the Board of Trustees continue to explore innovative approaches and potential provincial funding models that represent overall efficiencies and allow for responsible approaches to meeting demand. The Three-Year Capital Plan is one of the best tools the District has to advocate for adequate, stable and predictable funding that will ensure our ability to provide quality infrastructure for all students for years to come. District administration is committed to continuing its advocacy on behalf of our stakeholders in this regard.

NEXT STEPS

The approved *Three-Year Capital Plan 2020-2023* will be submitted to Alberta Education by April 1, 2019.

ATTACHMENTS and APPENDICES

- | | |
|----------------|---|
| ATTACHMENT I | <i>Three-Year Capital Plan 2020-2023</i> |
| ATTACHMENT II | Neighbourhood Classification (City of Edmonton 2017 Annual Growth Report) |
| ATTACHMENT III | Excerpt from <i>Alberta School Capital Manual, March 2015</i> |

JD:kk

Three-Year Capital Plan 2020–2023

Introduction

According to Statistics Canada, Edmonton's population grew by 120,345 residents between 2011 and 2016. This 15 per cent increase was the fifth highest growth rate in Canada among the top 100 municipal populations, and the largest among populations over 500,000 residents. Edmonton, Alberta's capital, has continued to attract new residents despite the economic impact from declining energy revenues since 2014. Although in the last three years' revenues from the energy sector have fluctuated significantly, economic conditions and employment appear to have stabilized in the capital region. The pace of development remains steady and further investments in school infrastructure will be required over the next decade.

Edmonton's economy is more diversified and growth in the professional and financial services sectors will continue to attract migrants from other regions in the province. This will contribute to an above average rate of population growth in comparison to other areas in the Province. Edmonton is Canada's youngest major city, and the number of young families and school-aged children is anticipated to continue to increase. In 2016, there were 116,170 residents between 0 and 9 years of age, representing 12.5 per cent of the population. This is reflected in high enrolment growth in Edmonton Public Schools in the same time period. Edmonton Public Schools experienced 18 per cent growth in enrolment from 2011 to 2016 compared to 15 per cent for the City of Edmonton overall. These record high figures are expected to grow as young families over the next decade continue to reside in neighbourhoods that are more family-oriented (three bedrooms or more) and affordable.

While there has and continues to be a steady investment in infill development, residential construction has primarily been focused in newly developing neighbourhoods in south and west Edmonton. Investments in new school infrastructure, including the opening of 14 new public schools over the past three years throughout the City, have helped to accommodate young families and children in developing neighbourhoods. The opening over the next three years of Dr. Anne Anderson School in Heritage Valley, Thelma Chalifoux School in Larkspur, Soraya Hafez School in McConachie, and a new K–9 school in East Chappelle will help relieve some of the pressures that existing schools currently face in trying to accommodate enrolment growth generated from newer communities. Edmonton Public Schools also continues to invest in mature areas with the construction of two replacement schools in the Westlawn and Afton communities. We believe that, wherever they live, students deserve high-quality learning environments. By working together with our valued stakeholders, we achieved success in some of our mature communities by bringing new or modernized learning environments to the Rundle area, Mill Creek, and Highlands.

With the District's commitment to the environment and providing 21st Century Learning Environments for all students in the City regardless of where they live, it will also be necessary to invest in modernizing aging facilities in core, mature and established neighbourhoods. These investments will be complemented by the City's commitment to provide a wider range of housing options through infill in these neighbourhoods. For these reasons it is difficult to prioritize new construction projects as each one listed is required to meet the immediate and imminent future demands from new growth areas. It is also difficult to rank new construction projects with projects for mature areas given the collective capital needs.

Infrastructure Planning Principles

In September 2013, the Board of Trustees approved the Infrastructure Planning Principles to guide capital, facility and student accommodation planning. The *Three-Year Capital Plan 2020-2023* is guided by these planning principles to guide decision making around infrastructure capital investment. The principles are as follows:

1. **Accountability:** Infrastructure decisions shall be transparent, evidence based, and reflect meaningful engagement with stakeholders.
2. **Centres for Educational Excellence:** Infrastructure assets shall serve as centres for educational excellence that meet the needs of District students, as well as their families and staff, where appropriate.
3. **Environmental Stewardship:** All decisions relating to infrastructure management shall demonstrate a commitment to environmental stewardship.
4. **Equitable Access:** All students and staff shall have fair access to safe, welcoming, high quality learning and working environments that will increase their opportunities and decrease their vulnerabilities.
5. **Fiscal Responsibility:** Decisions on infrastructure shall consider long-term needs and current realities, and reflect effective management of District resources.
6. **Service to Community:** District infrastructure assets are public buildings intended to serve our students, families, and staff as well as the broader community where appropriate. Capital investment shall consider the demographics, long-term plans, and needs of the community.
7. **Supports for the Whole Child:** Space shall be available to enable partnerships with shared responsibilities in order to provide integrated services that support District students.

The Infrastructure Planning Principles guide the District Infrastructure Plan and all infrastructure investment strategies. These principles guide the actions of the Board, the Superintendent and Administration when allocating financial resources, creating priorities for capital funding, maintaining and building new school buildings, acquiring land or declaring it surplus, establishing programming, exploring partnerships and creating places for safe, caring, healthy, respectful, diverse, inclusive and equitable learning.

District Strategic Plan 2018–2022 Priorities

The Strategic Plan sets the direction for the District, guiding initiatives from 2018 to 2022. The goals for each of the three priorities respond to students' needs and community expectations while also laying a strong foundation for ongoing educational and organizational success. Priority 2 - Provide welcoming, high quality learning and working environments and Goal 2 - Quality infrastructure for all emphasize that the quality of the District's infrastructure provides a foundation for high quality teaching and learning. This includes buildings and the systems that support those buildings (such as communication and transportation networks). High quality infrastructure allows staff to work more effectively and supports students as they learn.

District Infrastructure Plan

Edmonton Public Schools has the responsibility to meet a range of student needs across the city, and strives to meet community demand through a variety of program choices. The District continues to focus on providing the best education environments for students in all schools. There is a cost associated with operating and maintaining each square metre of District space, whether it is used or not used for educational purposes. District infrastructure is aging and the funding to improve all buildings while retrofitting for programming is complex as the current funding model is insufficient. The operation and maintenance of older schools costs more per square metre than that of newer schools.

An investment in modernizing or replacing schools will provide an environmentally sustainable approach to providing high quality learning environments across the city.

The challenge to accommodate all students, programs and needs increases as the delivery of additional capacity has fallen behind the growth in enrolment. Between the 2017–2018 and the 2018–2019 school years, Edmonton Public Schools grew more than any other school board in Alberta with a provincial reported increase of 2,744 students. The space currently available is finite and not necessarily in the optimal geographic locations as our student demographics continue to shift. The ability to be a “District of Choice” and to provide services to students and communities is being challenged as our overall space utilization rate rises.

The District Infrastructure Plan is aimed at transforming the District’s inventory of infrastructure assets to ensure outstanding educational opportunities and facilities are available for all students. It also identifies timelines and goals to provide high quality learning environments, respond to community needs, address the deferred maintenance, and right size District space to efficiently meet short-term and long-term needs. The desired outcomes of the District Infrastructure Plan are to:

- ensure the District has sufficient infrastructure to offer high quality learning environments, geographically located to serve District demographics
- align District infrastructure operations to effectively support the infrastructure management plan
- support asset management plans for all buildings
- ensure sufficient space is available for partnerships and community supports
- be consistent with a sustainable transportation system designed to serve District needs
- demonstrate commitment to continuous evergreening of infrastructure needs beyond 2022
- support financial efficiencies to ensure District funds are directed to the areas that provide benefits for the most students

Consistent application of the Infrastructure Planning Principles, through the development of the District Infrastructure Plan and its implementation through the Ten-Year Facilities Plan and Three-Year Capital Plan, is intended to build the confidence and trust of stakeholders in the District’s infrastructure planning and management. Government stakeholders and the public will see that the District’s infrastructure is effectively supporting optimum learning opportunities and supports for students, is responding to community needs, and is enabling the realization of the District’s vision and mission. The District will create opportunities for ongoing engagement with partners, community members, the City of Edmonton and provincial ministries to implement the District Infrastructure Plan. Four areas will be addressed within the District Infrastructure Plan framework: 21st Century Learning Environments for teaching and learning; Community/Partner Space; Procurement; and Environmental Sustainability & Energy Management.

Ten-Year Facilities Plan

Alberta Education requires school Districts to have a Ten-Year Facilities Plan that provides a broad overview of the school jurisdiction’s facilities and submit it to Alberta Education upon request. The *Ten-Year Facilities Plan 2015–2024* provides an overview of the District’s facilities and identifies long-range facility needs. As per Alberta Education guidelines, the plan provides facility information by sector, enrolment trends and projections, demographic data, facility condition information, current and projected utilization rates and programming opportunities. The plan identifies future modernization and expansion needs, and informs the development of the District’s Three-Year Capital Plan. This Plan will be updated and incorporated within the District Infrastructure Plan.

The *Three-Year Capital Plan 2020–2023*

The proposed Three-Year Capital Plan identifies the District's capital priorities for two project types: modernizations/replacement schools and new school construction/major additions. In accordance with provincial direction, the overall priorities for these two categories must be submitted as one aggregated list. A separate list for each of the categories is included to provide clarity of priorities within each category. It is important to note that capital priorities may not be carried forward from one year to the next. The priorities indicated in the *Three-Year Capital Plan 2020–2023* are based on a review of all current data, with no consideration given to rankings indicated in previous years. It is difficult to prioritize new construction projects as each one listed is required to meet the immediate and imminent future demands from new growth areas.

While no specific partnership project is referenced in the Three-Year Capital Plan, the District places a high priority on providing space for a number of wrap-around services to support children and families. These tenants and partners provide a broad range of supports and services fostering student success and achievement.

21st Century Learning Environments

The District's Strategic Plan 2018-2022 continues to place an emphasis on providing welcoming, high quality learning and working environments. The quality of the District's infrastructure provides a foundation for high quality teaching and learning, which will allow staff to work more effectively and supports students as they learn. A key strategy is a focus on 21st Century Learning Environments for teaching and learning - an approach to facility design intended to respond to the multitude of different teaching and learning styles and preferences, including group, team, and individual learning. Designs are intended to support professional learning communities that enable educators to collaborate, share best practices, and integrate 21st Century skills into practice, and students to learn in relevant, real world 21st Century contexts (e.g., through project-based or other applied work, providing equitable access to quality learning tools, technologies, and resources). Flexible environments including moveable partitions and walls or connecting openings infused with bright space, whether through increased natural light or a variety of lighting treatments, will facilitate collaborative, cross-curricular learning. Circulation space will support multi-functional use including opportunities for private study, small group work, or for gathering, performances or displaying art and projects. Spaces for wet and dirty activity will be provided, as well as specialized instructional space and equipment to support Career Technology Foundations and Studies (CTF/CTS). Learning communities for different instructional groupings will be incorporated which will each include student and staff supports such as lockers, cubbies, washrooms, and staff working stations. Environmental sustainability and energy management will be incorporated utilizing alternative energies such as solar generation, with more natural and eco-friendly materials. Facilities will be designed to function as a Learning Lab, to allow for learning in the areas of design and engineering, showcasing opportunities to study and analyze environmental sustainability.

Designs for Soraya Hafez, Thelma Chalifoux, and Dr. Anne Anderson schools will model the principles of 21st Century Learning Environments upon opening in the next two years. These principles will also be incorporated in the design of new schools in Chappelle East and the Westlawn Cluster replacement schools. Dr. Anne Anderson School will feature a unique community access partnership with the City of Edmonton, who has funded expanded gymnasium and enhanced fitness amenities as part of a community recreation wing in the building.

Environmental Stewardship

As a responsible organization operating within a changing global environment, Edmonton Public Schools makes environmental sustainability and energy management areas of focus. The District recognizes that minimizing environmental impacts will enhance operational efficiency and has, or is about to embark, on several initiatives to reduce the District's carbon footprint. In an effort to increase advocacy related to environmental stewardship, on January 22, 2019, the Board of Trustees passed a motion "That the Edmonton Public School Board advocate to the provincial government that new schools be net zero."

Since 2012, various environmental planning documents have been in place to support and advance the District's 2010 Environmental Policy. In the spring of 2018, Edmonton Public Schools formally released its first Energy and Environment Strategy. The document summarizes current initiatives that will guide our District's sustainability efforts over the next few years. The strategy is a benchmarking tool to track and report on the District's sustainable performance, and it will be reviewed every four years by the Infrastructure Department and EnviroMatters Office. Consultations with external agencies will be ongoing to monitor goals, timelines and key performance measures, and to track the success of the strategy.

In terms of Leadership in Energy and Environmental Design (LEED), certified District schools provide a healthier learning and working environment through use of natural light and improved air quality, in addition to being more energy-efficient and more cost effective to operate. Edmonton Public Schools has seven schools that received LEED Gold designations and seven schools with LEED Silver designations. All new District schools are built to achieve a minimum of LEED Silver certification. Schools opened in 2017 and 2018 are awaiting their certification through the Canadian Green Building Council.

The District has identified the need to calculate and monitor its carbon footprint so that strategies can be put in place to manage and reduce it. Edmonton Public Schools' EnviroMatters Office has partnered with EcoAmmo Sustainable Consulting to perform quarterly carbon and sustainability reporting to increase the accuracy and reliability of our environmental footprint data. In spring 2018, the District received its first verified annual carbon footprint report, combining all the 2017 quarterly data into one comprehensive document. Environmental trends will inform new school construction and modernization designs based on the District's specific sustainability needs and areas for improvement.

On February 20, 2018, the District introduced a District Solar Strategy. It is aimed at aligning District practice with the Government of Alberta's "30 by 30" initiative to have 30 per cent of the province's electrical energy needs generated from renewable sources by 2030. Recently, nine individual school construction and modernization projects received a separate grant of \$750,000 to fund the design and installation of solar panel arrays during construction. Edmonton Public Schools has also been working with the Government of Alberta in regards to providing solar technology to our existing school buildings.

Growth and New Development

According to the City of Edmonton *Annual Growth Monitoring Report (2017)*, from 2011 to 2016, Edmonton's population grew from 812,201 to 932,546. This is an increase of over 120,000 people in five years. Edmonton remains the fastest growing major city in Canada. If this pace of population growth continues, the Capital Region Board anticipates that the Edmonton region will require a minimum of 150,000 new housing units by 2040. Edmonton Public Schools continues to outpace this growth on a per cent basis, with student enrolment expected to increase by approximately three per cent again for the 2019–2020 school year, making this the eighth consecutive year of three per cent growth.

As typical neighbourhood life cycle processes indicate, new development of vacant lands in the southwest and southeast areas will continue to attract young families with young children over the coming years, and capital projects will need to be able to accommodate this growth. These newly developed neighbourhoods will typically see a decline or stabilization in population, as students graduate high school and decide to move to more affordable neighbourhoods in newly developing areas. Although a neighbourhood's population stability over the course of its life cycle can depend on a variety of variables (including economic and social conditions, and whether the neighbourhood experiences redevelopment, residential intensification, or revitalization), school-aged population generally has a strong correlation with the affordability and the availability of housing units with three or more bedrooms. Established and developing neighbourhoods (Attachment II) have a greater proportion of three bedroom or more housing units than core and mature neighbourhoods.

According to the City of Edmonton, the number of residential units has grown quickly and in high volumes in newly developing communities. The majority of this development is in the southwest, southeast and the west. In the last five years, 10 developing neighbourhoods grew by more than 1,000 residential units as shown through building permit activity. Most were in the south (Chappelle, Allard, Walker Laurel, Windermere, Summerside and the Orchards) with the exception of Rosenthal in the west, and McConachie and Crystallina Nera West in the north.

In 2018, Edmonton had 56 developing communities: 21 were 75 per cent or more complete; 16 neighbourhoods were between 50 per cent and 75 per cent complete; and 19 neighbourhoods were 50 per cent or less complete. Since these neighbourhoods will near completion in various stages over the next decade, there will be simultaneous need to provide accommodation for students from K–12. If capital funding does not match the pace of development, existing schools that are already highly utilized will face increased organizational and program delivery challenges as they try to accommodate these students. To meet the demand for student learning spaces in these areas, students will continue to be designated to schools with space to accommodate them. Many of these schools are aging facilities in established or mature neighbourhoods located a significant distance away from where these students live.

Intensification in the form of infill housing in core and mature neighbourhoods is a strategy that the City has attempted to use to increase the population in core and mature communities. The City has set a target of creating 25 per cent infill units within core and mature communities. However, to increase student generation in these neighbourhoods, infill housing will need to provide more affordable and family-oriented (three or more bedroom) units. An increase in student population in core and developing neighbourhoods would complement capital investments in school replacement and modernization projects.

Student transportation is directly impacted by the simultaneous development of 56 new communities in the City of Edmonton. Every time a new neighbourhood begins to develop, student transportation must add buses. Often Edmonton Public Schools buses are in these communities before Edmonton Transit Service (ETS) is available. Developing communities do not have a local school at the beginning, or possibly ever, thereby requiring all students to be transported to a designated school. Additionally, if a school is located in or near a developing community, students may be unable to safely walk to school due to incomplete sidewalks and roads.

Busing is generally provided to elementary students residing in neighbourhoods where there is no neighbourhood school. Currently, the greatest pressures on these fixed route ride times exist in west, southwest, and southeast Edmonton, due to the long distances to designated schools. ETS is the preferred means of student transportation for junior high and senior high school students. Where ETS to the designated school is not available or does not provide an acceptable level of service, yellow bus service will be provided. The number of yellow bus riders has increased by 4,000 students for the five-year period 2013–2018, or approximately 40 per cent. The greatest pressures on yellow bus ride times in the next year will likely be students in developing neighbourhoods (such as Edgemont and Keswick) that are designated to schools in established areas.

Annexation

Effective January 1, 2019, a total of 8,267 hectares of land from Leduc County and Beaumont were annexed into the City of Edmonton. It is anticipated that school district boundaries will become contiguous with the new municipal boundaries in the not too distant future. The annexation areas are identified as priority growth areas within the Edmonton Metropolitan Region Board (EMRB)'s Metropolitan Region Growth Plan. Planning for future schools to accommodate future residents that may come with new urban residential development in these areas will occur as part of any plan adoption processes initiated by the City of Edmonton.

Previously Approved New Construction Projects

Between 2002 and 2008, no new school buildings were opened in the District despite the significant amount of student population growth in new suburban areas during this time. Lillian Osborne School opened in 2009, and the Alberta Schools Alternative Procurement (ASAP) Phase I and Phase II schools were funded in 2007 and 2008. In June 2007, the Government of Alberta announced funding for six schools that opened in 2010 as part of ASAP I: A. Blair McPherson, Elizabeth Finch, Esther Starkman, Florence Hallock, Dr. Donald Massey and Johnny Bright schools. An additional three schools were announced in 2008 that opened in 2012 as part of ASAP II: Bessie Nichols School, Michael Strembitsky School, and a new replacement building for Major-General Griesbach School.

Over the course of 2014 and 2015, the province announced funding for 14 new construction projects and a 600 capacity addition to Lillian Osborne School. Three of these projects opened in 2016: Dr. Margaret-Ann Armour, Nellie Carlson and Roberta MacAdams schools. Eleven new schools opened in the 2017–2018 school year: Constable Daniel Woodall, David Thomas King, Dr. Lila Fahlman, Donald R. Getty, Hilwie Hamdon, Ivor Dent, Jan Reimer, Kim Hung, Michael Phair, Shauna May Seneca and Svend Hansen schools. These projects were all based on priorities outlined in the *Three-Year Capital Plan 2014–2017* and *Three-Year Capital Plan 2015–2018*.

On March 21, 2017, the Government of Alberta announced funding for two new construction capital projects: Thelma Chalifoux School (7–9) located in the established neighbourhood of Larkspur and Soraya Hafez School (K–6) located in the developing neighbourhood of McConachie. On November 17, 2017, construction funding was announced for Dr. Anne Anderson School (10–12) in the developing area of Heritage Valley. This announcement allows the District to respond to the growing need for high school space. Although the attendance area will be set one year prior to the opening date, Administration anticipates that these new spaces will provide relief in both the southeast and southwest regions with the most relief coming in the southwest.

On March 23, 2018, the Government of Alberta announced funding for two new construction capital projects: an elementary/junior high school (K–9) located in the developing neighbourhood of Chappelle

and the Westlawn consolidation cluster located in mature neighbourhoods. The approved concept includes the construction of a new K–3 school on the Afton School site and a new Grade 4–9 school on the Westlawn School site.

Current funded new construction project details are as follows:

Location	Sector	Grade Configuration	Project Scope
Thelma Chalifoux	SE	7–9	Scheduled to open in 2020
Soraya Hafez	NC	K–6	Scheduled to open in 2020
Dr. Anne Anderson	HS	10–12	Scheduled to open in 2021
Chappelle East	SW	K–9	Scheduled to open in 2021
Westlawn Consolidation: Afton site	W1	K–3	Scheduled to open in 2021
Westlawn Consolidation: Westlawn site	W1	4–9	Scheduled to open in 2021

The following table indicates the number of new construction projects requested versus approved since 2010:

Three-Year Capital Plan	Number of Projects Funded	Number of Projects Requested	Number of Projects Carried Over from Previous Year
2019–2022	1	12	11
2018–2021	1	12	10
2017–2020	3	14	10
2016–2019	5*	15	14
2015–2018	4 (+6*)	16	13
2014–2017	6	18	7
2013–2016	0	7	6
2012–2015	0	6	6
2011–2014	0	7	3
2010–2013	0	3	2

**Project funded only for design. Construction funding for five of these projects was funded in 2015.*

New School Priorities

The District has a variety of resources at its disposal to monitor and project student population pressures. Stakeholders can have confidence that District decisions are fact based. In calculation of capital priorities, the District uses a weighted decision matrix, which is a useful tool for making complex decisions, especially in cases where there are many alternatives and criteria of varying importance to be considered.

The following criteria were used in determining new construction priorities:

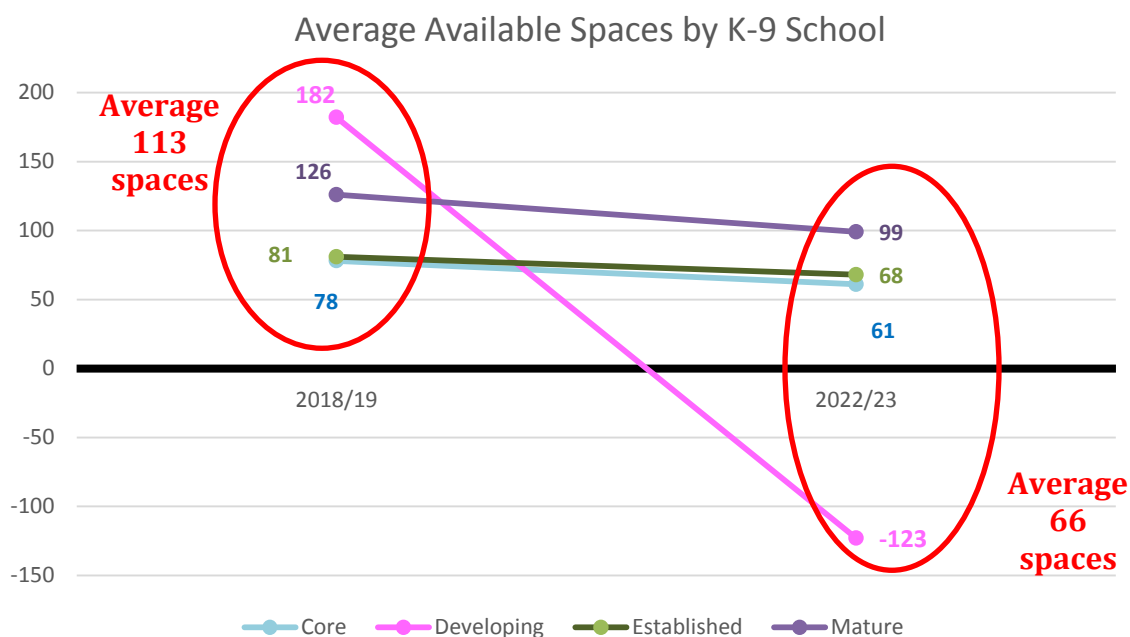
- number of current students residing in an area and number of projected students for that area

- the historical pace of development and the amount of development remaining in an area
- utilization of the schools that the majority of students residing in the area attend
- average distance travelled by the students to their designated school
- current state of development of the proposed school sites
- new capacity represented by recently funded capital projects, not yet operational

These criteria take into consideration both current demand and projected future growth in the new suburban areas that have a site available and a Neighbourhood Structure Plan (NSP) in place. An NSP is required for development activity in a neighbourhood to begin. This document provides the land use framework, population and density estimates and the number of housing units by type. The City has four neighbourhood structure plans in the planning phase, three in the southeast and one in the southwest. One neighbourhood structure plan was approved in the southeast in 2018.

Although the new construction projects will increase the District's capacity to accommodate students in new neighbourhoods, the pace of residential development, and therefore enrolment growth, in suburban areas has outpaced capital funding for constructing local accommodation. Suburban growth within the City of Edmonton accounts for the majority of the residential growth. This has resulted in a significant decline in available spaces in all schools.

The graph below shows how over the next three years the average number of available student spaces in K-9 schools across the district will decline. The most notable change in available spaces will occur in the developing areas of the City, where available space is anticipated to decline from an average of 182 available spaces to a deficit of 123 spaces. Available spaces will decline in core, mature and established neighbourhoods as a result of accommodating student growth from the developing neighbourhoods, where there will be a deficit of space. On average per school across the District, it is projected that there will be a decline from 113 spaces down to 66 spaces.



Space in K-9 schools in developing areas is expected to reach capacity during the 2020 - 2021 school year, including approved new capacity. Existing schools will face organizational, capacity, and programming challenges as they struggle to accommodate students residing in new neighbourhoods. As the city continues to develop, a growing number of schools will face enrolment pressures and similar measures will need to be taken to ensure all students are provided with quality learning environments. Over the past two years, the District has requested 42 modular classrooms from the province to address growth pressures at several schools nearing full or exceeding capacity. Of these modular classroom requests, 14 were funded by the province and 20 were funded by the District utilizing Capital Reserve funds. Funding modular classrooms utilizing the District's Capital Reserve funds is unsustainable, and does not address the need for new construction and new capacity efficiently. Only new schools can provide the capacity where it is needed to serve new growth areas.

The District's Space for Students initiative outlines recommendations for certain schools to manage student growth and meet the demand for student learning spaces due to large enrolment increases. Neighbourhoods or groups of neighbourhoods are given priority if they have the population required to sustain a school, keeping in mind that maximum capacities for schools are larger than they have been in the past. In some cases, a neighbourhood will not be considered for new school construction if sufficient student accommodation options exist in nearby communities.

High Schools

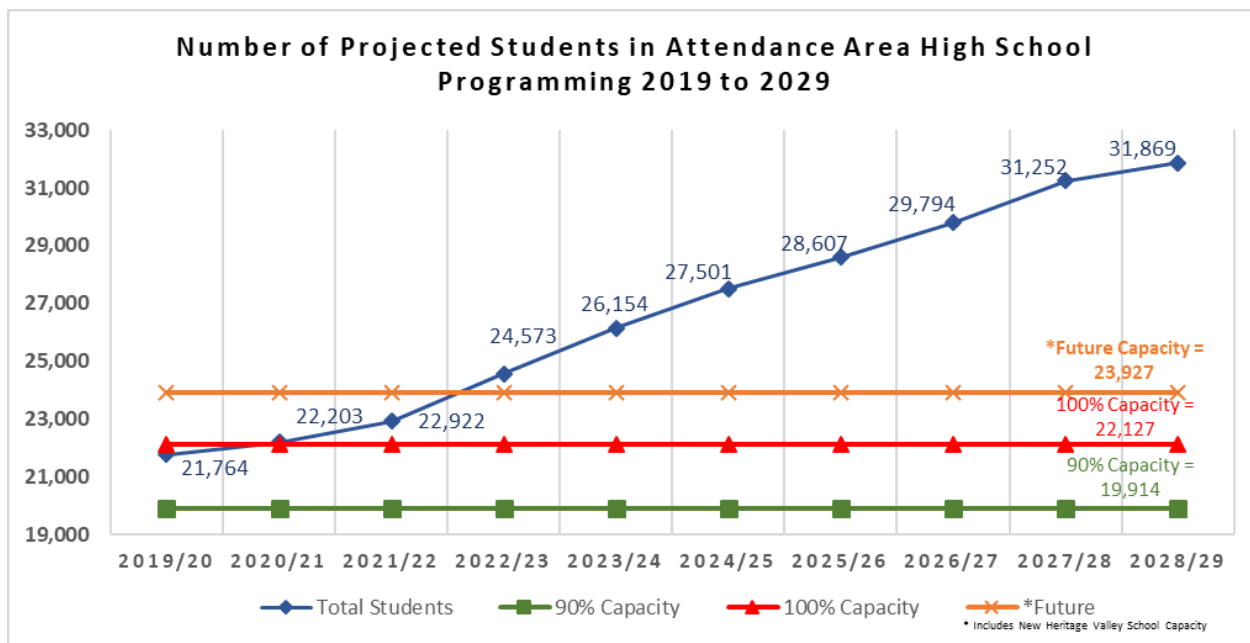
Growing enrolment in attendance area high schools led to the development of the High School Accommodation Framework 2016–2019 (the Framework). The Framework serves to identify current and future problems relating to student accommodation in high schools. The recommendation to adopt the Framework 2016–2019 was approved in January 2017. A chief function of the Framework is to complement District capital planning and inform the Three-Year Capital Plan.

The Framework has two principal priorities:

1. To effectively respond to current and future student enrolment in highly utilized high schools.
2. To repurpose space to improve efficient use of existing infrastructure in response to underutilized space.

The funding announcement for Dr. Anne Anderson School in the Heritage Valley area has prompted an update to the Framework.

There are approximately 22,127 total spaces in attendance area high schools in the District. It is anticipated that the new Heritage Valley high school will increase overall District attendance area high school capacity by 1,800 spaces. This brings the future total to 23,927 spaces for attendance area high school student accommodation. In September 2018, the number of students enrolled in the 12 attendance area high schools was 19,203 (September 30, 2018, data). Newly adjusted projected enrolment in attendance area high schools shows that enrolment is expected to reach approximately 28,607 students in September 2025. Considering current high school spaces and the recently funded future high school, the projected number of students will likely exceed the available space within the District in September of 2022. Essentially, the 1,800 future spaces in Heritage Valley has moved the critical date forward one year from what was previously expected according to the Framework. The following chart demonstrates the District high school attendance area capacity against projected student enrolment (January 2019 data):



New construction of high schools is requested in developing neighbourhoods to increase overall capacity for current and future resident high school students. Even with opening Dr. Anne Anderson School, high school space is expected to be fully utilized by 2022–2023. The existing area high schools are experiencing high utilization rates. In 2018–2019, Harry Ainlay School has a utilization rate of 101 per cent, Strathcona School has a utilization rate of 104 per cent, Queen Elizabeth School has a utilization rate of 102 per cent, and Lillian Osborne School has a utilization rate of 90 per cent. We are anticipating that these utilization rates will continue to rise for 2019–2020 and subsequent years. The need for additional high school capacity in the south and northwest will continue until additional space is added through additions or new construction.

Currently, J. Percy Page School (106 per cent utilization this year) and W.P. Wagner School (76 per cent utilization this year) serve the southeast sector of the District, and they are the only high schools located within this sector. While some capacity currently remains unutilized, high school student residency in the southeast currently exceeds the capacity of these two high schools. Portions of the Burnewood/The Meadows areas of the sector are designated to McNally School, which is located in the south central sector of the District. There is residual capacity at McNally School; however, the enrolment there has been steadily rising and it is a significant distance requiring long travel times to reach. All three high schools are currently exceeded in capacity by number of students living in the attendance areas, which will become more acute as new neighbourhoods continue to grow within The Meadows plan area and south of Anthony Henday Drive.

A new attendance area high school in The Meadows is proposed by the Board of Trustees as a Year 1 request on the Three-Year Capital Plan, which remains as the first priority in the Plan. This future school will accommodate approximately 1,800 students in Grades 10–12, with consideration for a 600 seat future addition. A high school in The Meadows will help relieve existing and future pressures on high schools to accommodate students in south Edmonton.

In the southwest, a new attendance area high school in the Windermere plan area (Glenridding Heights) is recommended as a Year 2 priority, as Lillian Osborne School has reached 90 per cent utilization despite having just opened a 600 student spaces addition.

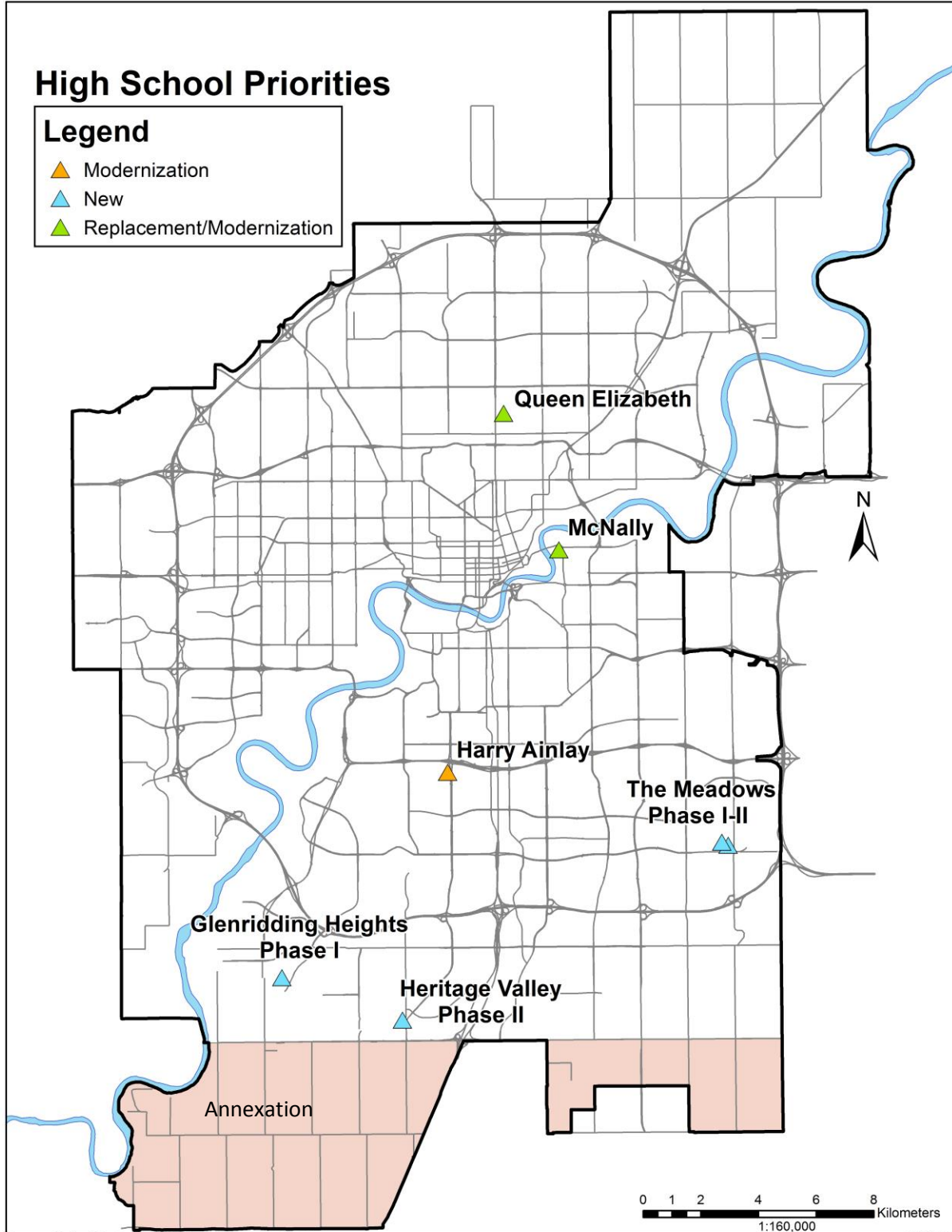
In northwest Edmonton, Queen Elizabeth School has a utilization rate of 102 percent, and resident student populations are projected to continue to increase over the next five years. Four modular classrooms are being added to the site to support this increase. A modernization of this school is included as a Year 1 priority. A value management study will be needed to determine if Queen Elizabeth School can be modernized and expanded, or if a replacement building would present a better approach on a cost benefit basis.

Growth in the west, within the Edgemont, Lewis Farms, The Grange and Riverview plan areas, will also be monitored closely, as a future high school will be needed in the foreseeable future. A new west high school would best be implemented as part of a future modernization of Jasper Place School, which is currently operating at 75 per cent utilization.

High School Priorities

Legend

- ▲ Modernization
- ▲ New
- ▲ Replacement/Modernization



Prepared for by Infrastructure Planning, Edmonton Public Schools

2/14/2019

There has been growth in west Edmonton, as Rosenthal and Second represent two of the City's 12 fastest growing neighbourhoods. However, the current rate of development has been significantly higher in south Edmonton when compared to other areas of the City. Enrolment projections and capture rates of attendance area high school students suggest that while there will be enrolment increases in the west, Jasper Place and Ross Sheppard schools will be able to accommodate existing and projected student growth in their attendance areas over the next 10 years. Administration will continue to monitor development throughout the city and assess high school space on a yearly basis through the High School Accommodation Framework. A future capital request could include a high school in the west.

Administration has identified a number of neighbourhoods planned for development or that are just starting to develop in the west, southwest, southeast and northeast areas of the city. These areas are included annually in our evaluation for new construction capital priorities and could be added to future capital construction priority requests. Primarily, we are monitoring the development in the Horse Hills, Riverview and Decoteau areas. However, other neighbourhoods in the south that could start developing in the near future include Aster, Mattson, and Windermere Neighbourhood 5. In addition to the new areas, we are watching the student populations in a number of partially developed neighbourhoods in the north and south. As these areas continue to develop, the need for local accommodation will become more clear. Requests for additional capital projects will be included in future capital plans when demand warrants.

The following chart indicates the District's proposed new construction priorities based on the considerations listed to this point:

Priority 2019–2022	New Construction Project Location	Capacity	Sector	Cost (millions)
Year 1				
1	The Meadows High School 10–12 – Phase I	1,800*	HS	\$79
2	Keswick K–9	950	SW	\$33
3	Glenridding Heights 10–12 – Phase I	1,600	HS	\$61
Year 2				
4	Edgemont K–9	950	W2	\$33
5	McConachie 7–9	950	NC	\$35
6	Glenridding Heights K–6	650	SW	\$21
7	Rosenthal K–6	650	W2	\$21
Year 3				
8	Hawks Ridge K–6	650	W2	\$21
9	Riverview K–9	950	W2	\$33

10	Glenridding Heights 7–9 – Phase II	800	SW	\$30
11	Two High School Additions – Phase II	1,200	HS	\$22

* Opening Capacity

The list of new construction priorities is carried over from the *Three-Year Capital Plan 2019-2022*, as no new projects have been funded since October, 2018. A new attendance area high school in Glenridding Heights is proposed by the Board of Trustees as a Year 1 request on the Three-Year Capital Plan. It currently sits as the seventh priority on the plan. This future school will accommodate approximately 1,600 students in Grades 10–12.

New School Priorities

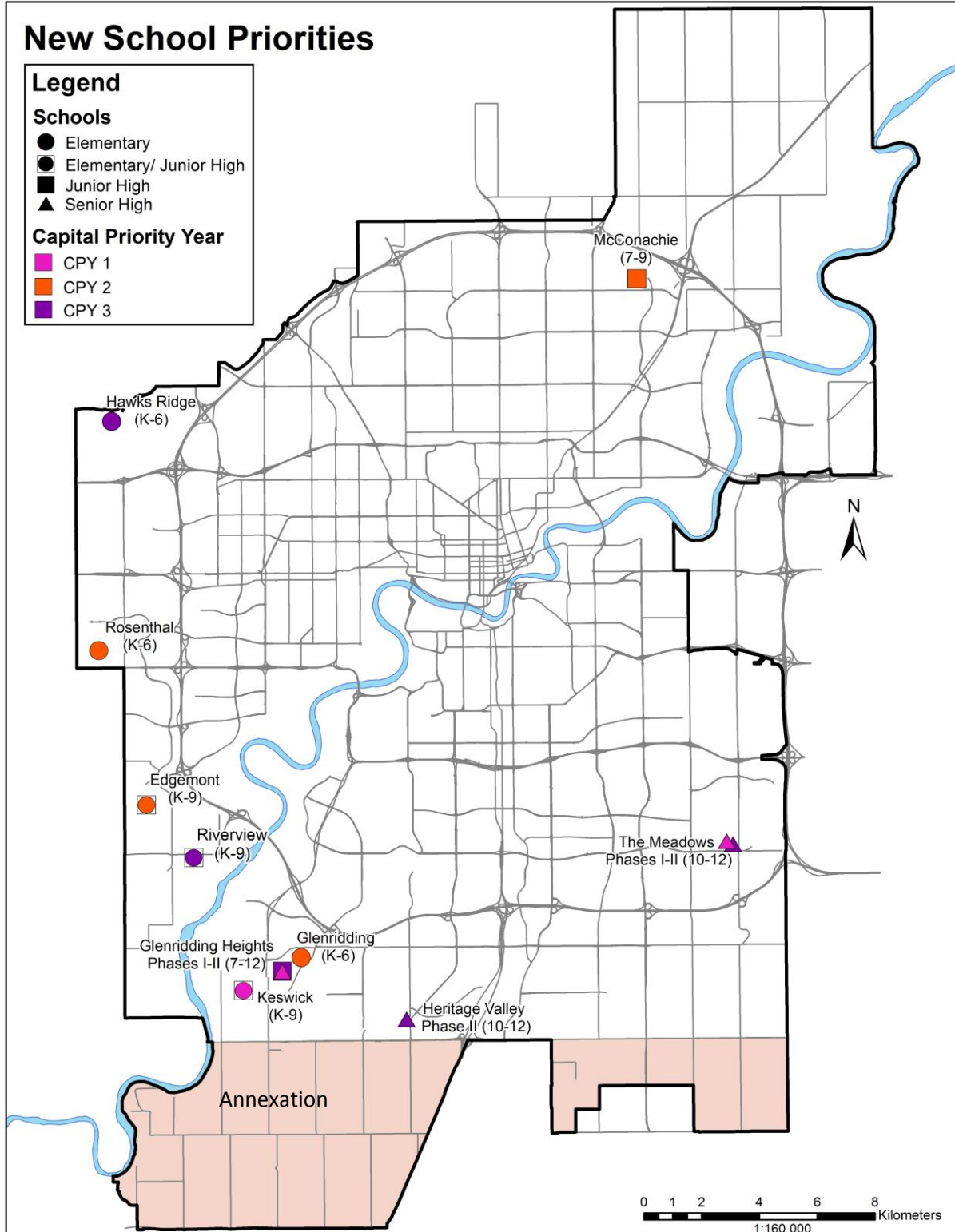
Legend

Schools

- Elementary
- Elementary/ Junior High
- Junior High
- ▲ Senior High

Capital Priority Year

- CPY 1
- CPY 2
- CPY 3



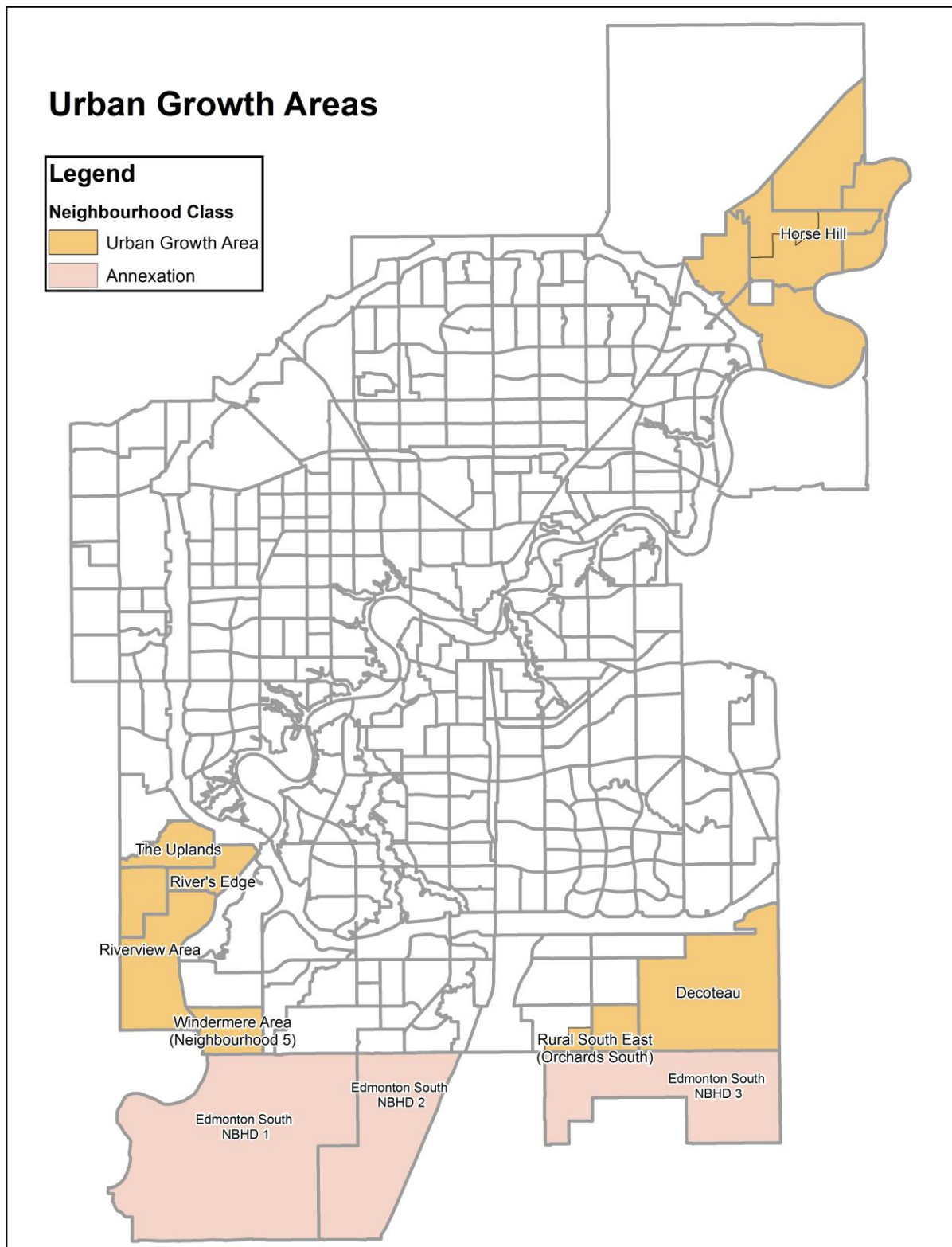
Prepared for by Infrastructure Planning, Edmonton Public Schools

2/14/2019

While new construction funding will continue to be requested from the Provincial Government through the annual submission of a capital priorities plan, the increasing need for new capacity in developing areas will warrant exploration of alternative approaches to funding and delivering new school facilities. This could include developer participation in new schools, or other creative funding avenues which might be possible through discussions with provincial and municipal governments and the development industry.

The map on the following page shows areas that will continue to be evaluated for future new construction priorities, but will not be included in this plan.

Urban Growth Areas



The Impact of Infill on Student Populations in Mature Communities

The City of Edmonton, through its various infill initiatives, is actively encouraging residential intensification in the City's core mature communities. The City has set a target of creating 25 per cent infill units within core and mature communities. However, the Growth Monitoring Report (2017) provides evidence that student generation is positively correlated to the presence of affordable, three or more bedroom housing units. To see students being generated in core and mature communities, infill housing will need to provide this housing type, as it is attractive for young families with young children. An increase in student population in core and developing neighbourhoods would complement capital investments in school replacement and modernization projects.

In 2016, Edmonton added 2,022 new units in mature and core neighbourhoods, which is the greatest net unit growth in the last ten years. This is a significant increase from the 1,701 new units added in 2015. The City has committed to working with partners to ensure that the housing stock being built is diverse (including townhouses and mid-rise multifamily housing) and is built to provide easy access to transit. Several City-led initiatives are underway to continue revitalizing mature and core neighbourhoods, including redevelopment of the Downtown area, West Rosedale and Blatchford. Regardless of population and unit growth in these areas, there has been negligible impact on student generation in these areas.

Overall, it is projected that the population of school-age children in the City of Edmonton increased by two per cent in 2016, with significant variation in the magnitude of population change across neighbourhoods. In 2017, the total enrolment was 98,914 – a 3.3 per cent increase from the previous year. In 2018, the total enrolment was 101,865 – a 2.9 per cent increase from the previous year and it is anticipated that growth for 2019 will remain around 3 per cent.

The District currently has more space than is required within mature areas; however, this available space is steadily shrinking as more students need to be accommodated in these areas when schools in the developing areas are over capacity. The cost of deferred maintenance on many of these buildings continues to increase and operational costs impact funding available for classrooms. Until new space is received, these schools will require investment as their enrolment will continue to grow. The Space for Students initiative will ensure that all students receive the same standard of access to high quality teaching and learning environments.

The District recognizes that schools are important hubs for the community. Where a school building is no longer required to provide educational programming, the District will work with the City of Edmonton and other partners to support the provision of community supports and amenities where feasible. Partnerships are also intended to augment supports and services provided to the community through operating school facilities.

Space for Students in Mature Communities

In March 2016, the District began an extensive consultation process with three mature community clusters - Greater Britannia (four schools), Greater Rosslyn (seven schools) and Greater Westlawn (four schools) - around school consolidation concepts. Working committees were created in each cluster to explore this concept with the ultimate goal of placing a community driven plan for consideration in the *Three-Year Capital Plan 2018–2021*. The working committees consisted of principals, parents and community representatives. The concepts developed through the committees were taken to the general public in March 2017.

A preferred consolidation concept for the Westlawn cluster was identified and approved by the Superintendent in the spring of 2017. The approved concept will consolidate Afton, Glendale, Sherwood and Westlawn schools into a new K–3 school on the Afton School site and a new Grade 4–9 school on the Westlawn School site. The Board of Trustees approved an amendment to the *Three-Year Capital Plan 2018–2021* to include this concept on September 2017. Funding was announced for the project in May 2018. Planning and design for the project is now underway.

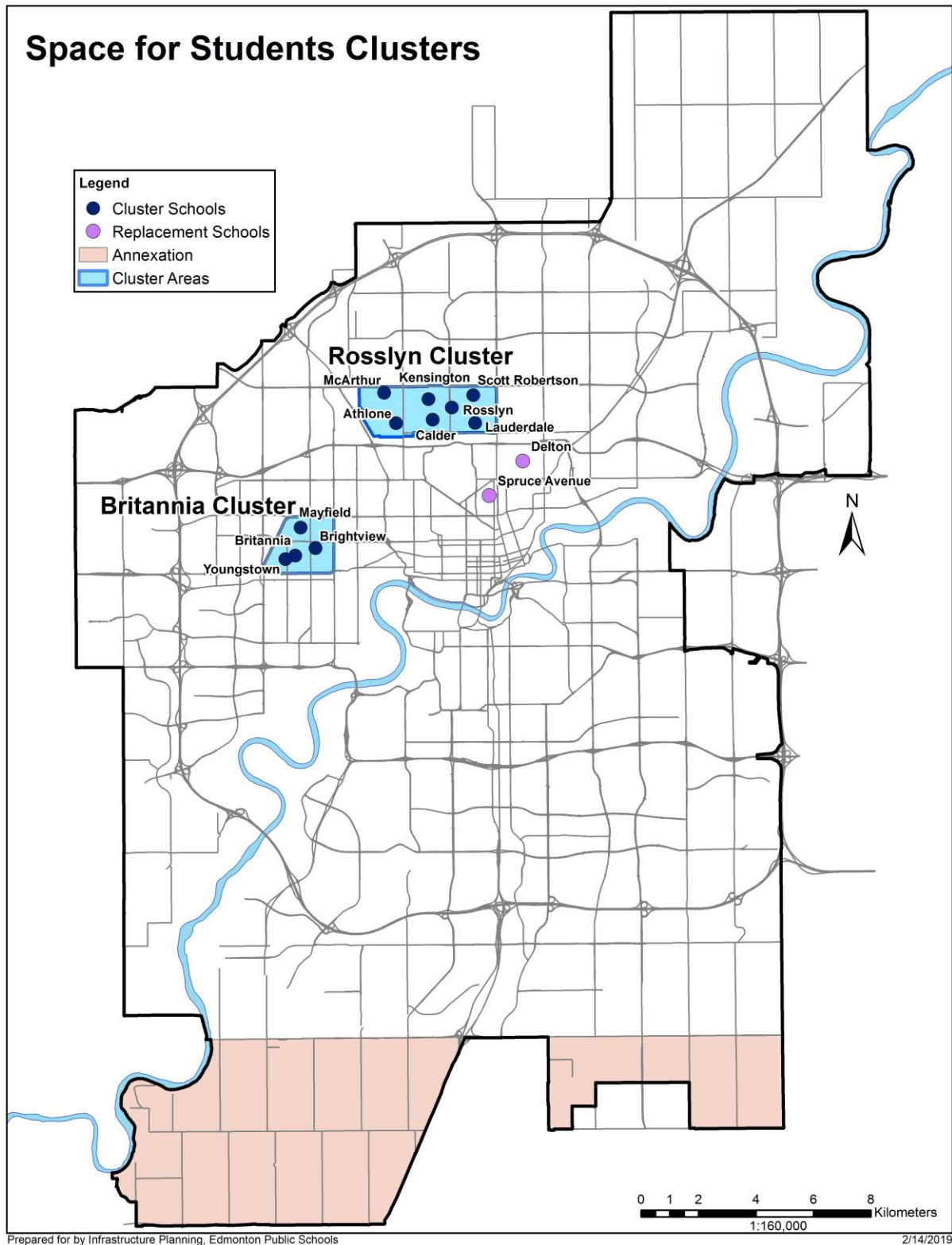
A preferred consolidation concept for the Britannia cluster was identified and approved by the Superintendent in the fall of 2018. The approved concept will consolidate Brightview, Britannia, Mayfield and Youngstown schools into a new pre K–3 school on the Mayfield School site and a new Grade K–9 school on the Britannia School site. The Board of Trustees approved an amendment to the *Three-Year Capital Plan 2018–2021* to include this concept in October 2018. The closure of schools in the cluster will be considered only once funding is approved, in advance of the opening of the replacement school buildings.

The Greater Highlands and The Greater Lawton communities underwent a similar consultative process beginning in 2014. In the Greater Lawton area this resulted in the consolidation of three schools into a new K–9 school. Ivor Dent School welcomed students in September 2017. In Greater Highlands, a concept plan was approved that consolidates Highlands, Montrose and Mount Royal schools into a newly modernized K–9 Highlands School. This project has been funded and is starting the construction phase.

The Space for Students initiatives in the Greater Highlands and Greater Westlawn areas provided the District opportunities to collaborate with provincial and municipal governments and partner agencies, as well as community groups, to contribute positively to community sustainability.

The two ongoing Space for Students initiatives in the city’s mature areas of Britannia and Rosslyn remain as capital priorities. To reflect the ongoing work involving the District’s aging infrastructure in the mature communities, one additional placeholder is included in the list of priorities. The placeholder is intended to accommodate the outcomes from potential future school consolidation discussions.

Space for Students in Mature Communities



Modernization Projects

Over the past 27 years, the Province has provided funding to the District for modernization projects at 60 schools within the mature areas. Over \$250 million has been invested in mature area schools through Infrastructure Maintenance and Renewal (IMR), Capital Projects or other provincial capital funding programs. The District has not historically received modernization project funding on an annual basis. The funding for modernizing mature area schools has been consistently below the levels needed to keep the District's entire aging infrastructure in fair to good condition.

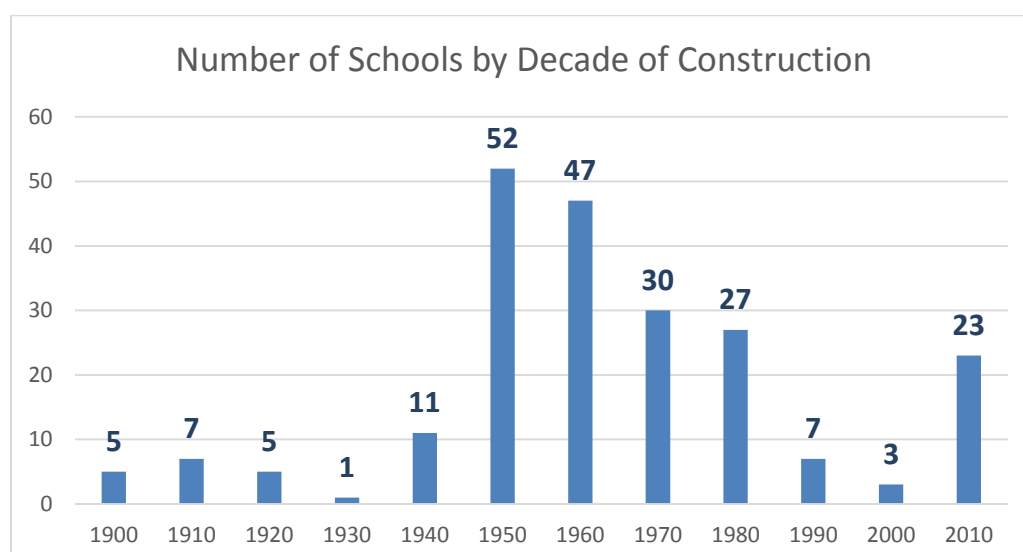
Three-Year Capital Plan	Number of Projects Funded	Number of Projects Requested	Number of Projects Carried Over from Previous Year
2019–2022	0	9	5
2018–2021	0	5	5
2017–2020	1	5	2
2016–2019	0	7	7
2015–2018	2	9	4
2014–2017	4	16	8
2013–2016	0	17	17
2012–2015	2	19	19
2011–2014	0	19	17
2010–2013	0	18	16

Current building condition data is based on a revised provincial five-year Facility Condition Index (FCI). The FCI is based on the deferred maintenance of the building divided by the replacement building cost, categorized as good, fair or poor. Condition changes and ratings are reassessed annually. Buildings are considered to be in good condition with an FCI of less than 15 per cent; fair condition with an FCI between 15 per cent and 40 per cent; and poor condition with an FCI greater than 40 per cent.

Condition	FCI Definition	Capital Planning Initiative Definition
Good	Facilities with an FCI of less than 15 per cent.	Adequate for intended use and expected to provide continued service life with average maintenance.
Fair	Facilities with an FCI that is equal to or greater than 15 per cent or equal to or less than 40 per cent.	Aging components are nearing the end of their life cycle and require additional expenditures for renewal or refurbishing.
Poor	Facilities with an FCI of greater than 40 per cent.	Upgrading is required to comply with current codes or standards and deterioration has reached the point where major repairs or replacement are necessary.

The District recognizes the critical need to reinvest in its existing buildings. At 50 years, major building components such as mechanical and electrical systems reach the end of their expected life cycle and

require replacement. This year, 12 schools turned 50 years old (opened in or prior to 1968). This brings the total number of school buildings that are 50 years or older to 127 schools. By 2028 it will be 156 school buildings.



The District believes that all students should have access to quality learning environments regardless of the age of the building or the socio-economic status of the neighbourhood. In that regard, the IMR program is an annual block capital grant distributed across the District, based on component-by-component building needs. The IMR program grant funds are separate and distinct from the annual three-year capital planning process. IMR funds are used to prevent or address emergent building issues, to address health and safety situations as they arise, and to address component-by-component programs across the entire inventory of District school buildings. Previous capital plans have included modernization projects for District schools based on the provincial facility condition, utilization trends and enrolment trends. The provincial audits are produced by several different assessors and are scheduled to be completed within a five-year interval; however, many are now more than five years old. This year's list of modernization requests was developed through an analysis of the previously mentioned factors as well as additional detailed building condition assessments for 171 schools commissioned by the District. These assessments are expected to continue providing the District with a consistent approach to the building conditions from the same point in time.

Modernization projects allow the District to provide equitable access to high quality learning environments to all students, reduce its environmental impact and improve operational efficiencies. The following chart indicates the District's proposed modernization priorities.

Priority 2019–2022	Modernizations/Replacements	Capacity	Sector	Cost (millions)
Year 1				
1	Delton Replacement K–6	650	C	\$17
2	Spruce Avenue Replacement 7–9	450	C	\$15

3	Queen Elizabeth Modernization/Replacement	Modernization or Replacement	HS	TBD
Year 2				
4	Harry Ainlay Modernization	Modernization	HS	TBD
5	McKee Modernization/Replacement	350	SC	\$17
6	Westglen Modernization/Replacement	350	C	\$13.5
Year 3				
7	Lendrum Modernization/Replacement	350	SC	\$9
8	Weinlos Modernization/Replacement	350	SE	\$13.5
9	McNally Modernization/Replacement	Modernization or Replacement	HS	TBD

Capacity is based on 2017 enrolment and value is based on provincial replacement value.

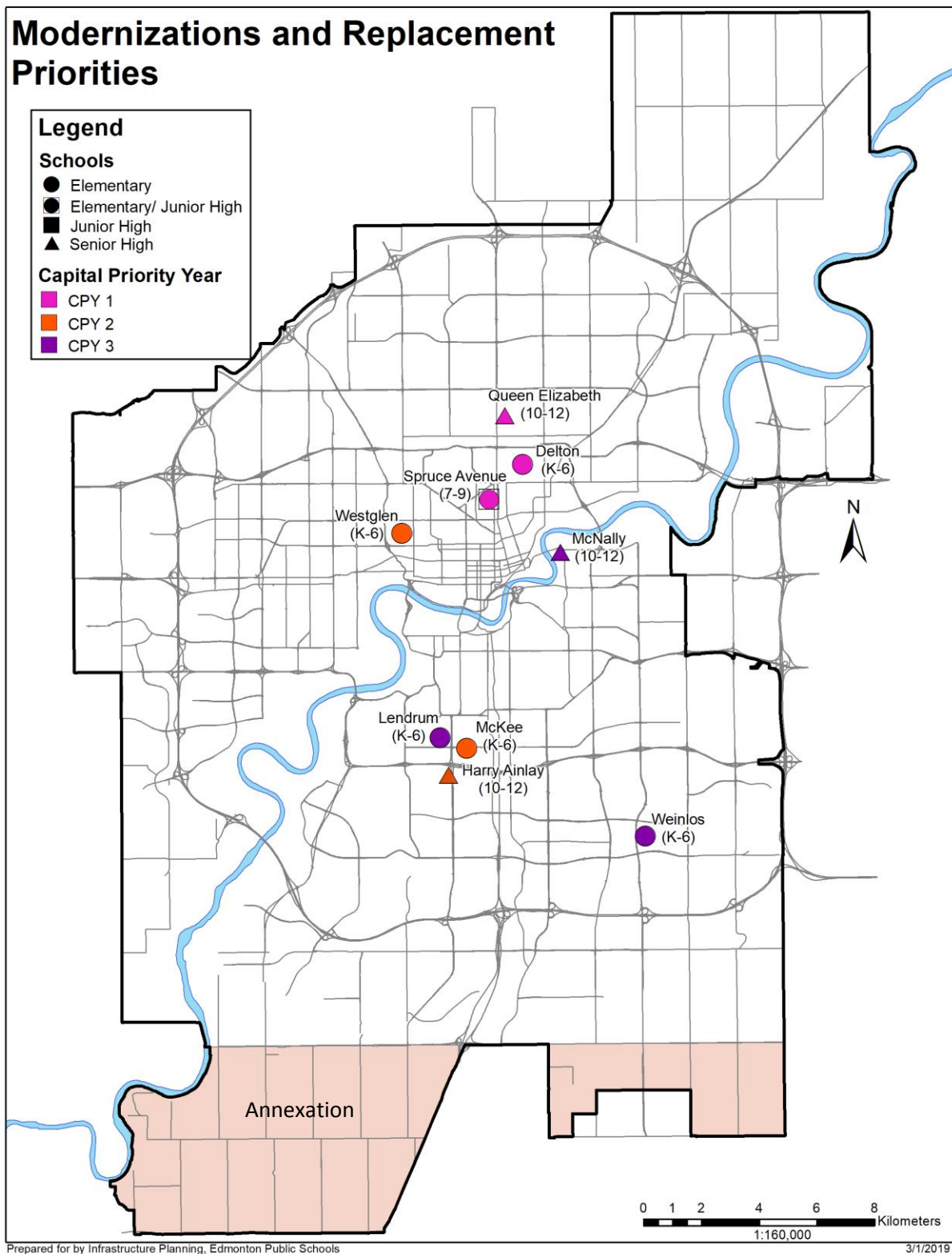
The list of modernization priorities is carried over from the *Three-Year Capital Plan 2019-2022*, as no new projects have been funded since October, 2018. This includes requests relating to the Space for Students initiatives (Britannia, Rosslyn and Westlawn clusters), the Sector Review process in 2010 (Delton and Spruce Avenue schools), and three high school modernizations. Harry Ainlay, McNally and Queen Elizabeth schools are the only remaining attendance area high schools in our District to not have received major modernizations since opening.

The completion of the detailed building assessments provided a substantial amount of additional information regarding the scope of work that is required to bring the District's aging infrastructure up to date. The assessment analyzed major building systems such as architectural, civil, electrical, and mechanical. In light of this data, additional requests were made in the *Three-Year Capital Plan 2019-2022*. The data reveals that McKee, Westglen, Lendrum, and Weinlos schools require the most significant investments to infrastructure. If the cost to modernize these individual schools is 75 per cent or more of the cost to replace them, the recommendation will be to replace the buildings instead of modernizing them. A value management study is required to verify the estimated cost of the project and to identify the scope of the project. The building condition assessments will continue to be used to ensure prioritization for future modernization projects is based on the comprehensive quantification of need, based on condition.

The Infrastructure Plan will guide the identification of priorities for future consolidation/replacement reviews to determine which schools within these sectors should be modernized. Modernizations are expected to extend the lifespan of a school by 40 years, before more investments in infrastructure are required. Cluster consolidation/replacement requests have recently been incorporated into the priorities list, which has led to a reduction of single modernization project requests, as cluster outcomes better represent the needs and aspirations of communities, and this approach is often the most-cost-effective and achievable method of addressing the challenges of our aging facilities.

The map on the following page indicates the location of proposed modernization and replacement priorities.

Modernization and Replacement Priorities



Aggregated Priorities

The uncertainty of access to capital funding creates challenges in prioritizing projects, for both modernization/replacement schools and new school construction. If the proposed *Three-Year Capital Plan 2020–2023* is approved, the unfunded projects identified in the provincial plan will need to be amended to reflect the new District priorities. Funding for modernization projects has been consistently below levels required to maintain high quality learning environments in all of the District’s aging infrastructure.

The pace of residential development in new suburban areas continues to outpace capital funding for construction of new schools to accommodate the increasing numbers of students. Where local schools are not present, additional pressures are placed on the District’s existing, already highly utilized infrastructure and transportation systems.

These challenges are intensified when blending modernization and new construction priorities, a submission requirement by the Province. Provision of stable, predictable funding for separate categories of priorities – ‘new’ separated from ‘mature’ (modernizations and replacement schools) - as annual funding blocks would contribute positively to the aggregation approach and its inherent challenges.

The proposed *Three-Year Capital Plan 2020–2023* reflects investment in both mature areas and new growth areas in the District’s capital priorities. The following balance outcomes were used to aggregate the different project types:

- balancing the new and the mature priorities by year and priority
- balancing the value of requests by year
- balancing the number of requests per year
- balancing the need for high school space with the need for K–9 space
- balancing existing versus emerging new priorities, when plans go many years without funding

The proposed aggregate list of priorities is presented in the following chart and represents a balance of investment in both mature areas and new growth areas.

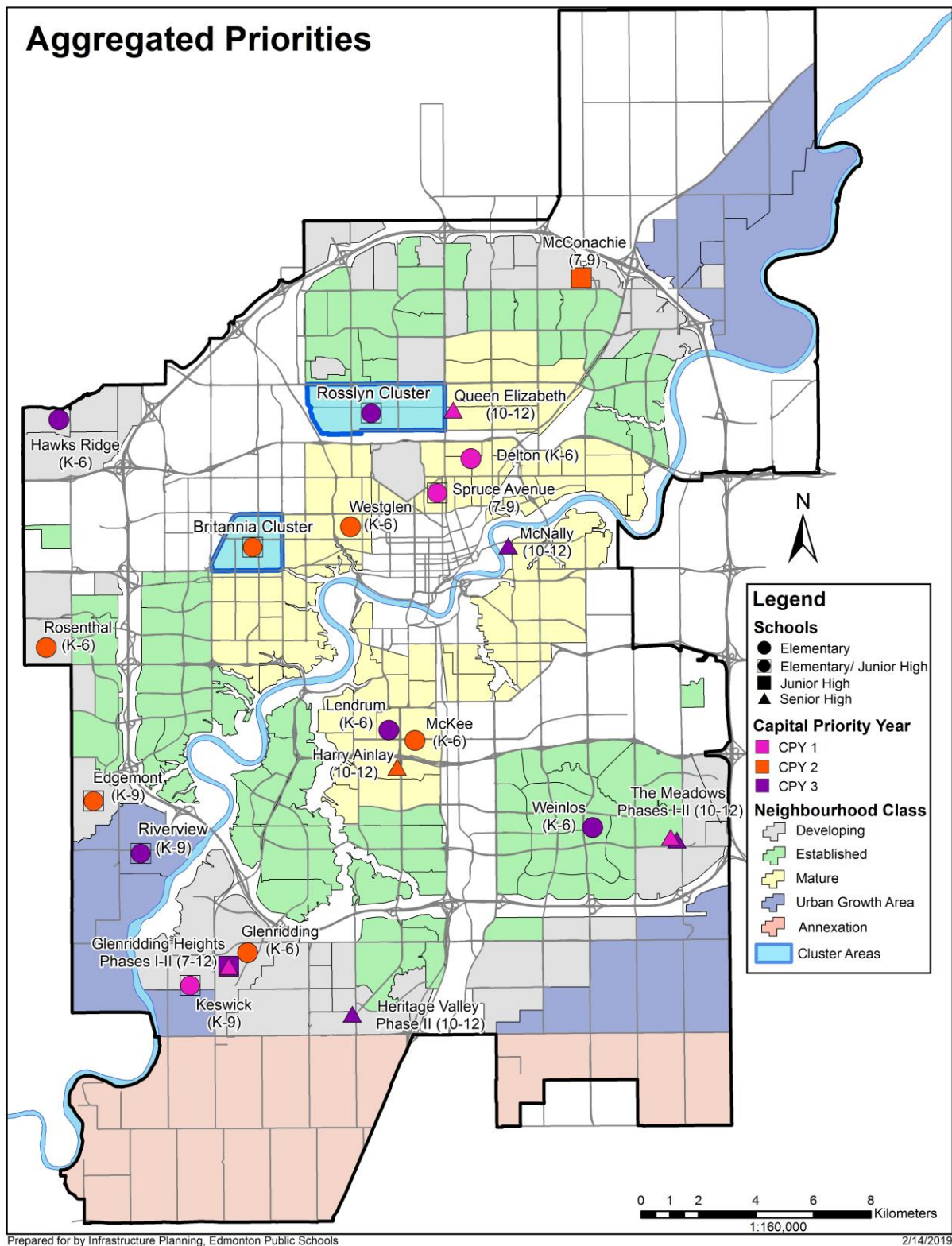
Priority 2020–2023	Aggregated Priorities	Capacity	Sector	Cost (millions)
Year 1				
1	The Meadows High School 10–12 – Phase I	1,800*	HS	\$79
2	Keswick K–9	950	SW	\$33
3	Delton Replacement K–6	650	C	\$17
4	Spruce Avenue Replacement 7–9	450	C	\$15
5	Glenridding Heights 10–12 – Phase I	1,600	HS	\$61
6	Queen Elizabeth Modernization/Replacement	Replacement or Modernization	HS	TBD

Year 2				
7	Edgemont K–9	950	W2	\$33
8	Britannia Cluster: Concept C Space for Students in Mature Communities	1,100	W1	\$43
9	Harry Ainlay Modernization	Modernization	HS	TBD
10	McConachie 7–9	950	NC	\$35
11	Glenridding Heights K–6	650	SW	\$21
12	McKee Modernization/Replacement	350	SC	\$13.5
13	Rosenthal K–6	650	W2	\$21
14	Westglen Modernization/Replacement	350	C	\$13.5
Year 3				
15	Space for Students in Mature Communities Rosslyn Cluster: Concept to be Determined	1,800–2,400 Replacement or Modernization	C	\$62–73
16	Hawks Ridge K–6	650	W2	\$21
17	Lendrum Modernization/Replacement	350	SC	\$9
18	Weinlos Modernization/Replacement	350	SE	\$13.5
19	Riverview K–9	950	W2	\$33
20	Glenridding Heights 7–9 – Phase II	800	SW	\$30
21	McNally Modernization/Replacement	Replacement or Modernization	HS	TBD
22	Two High School Additions – Phase II	1,200	HS	\$22
23	Space for Students in Mature Communities Project as determined by Infrastructure Plan	New or modernization	TBD	TBD

* Opening Capacity

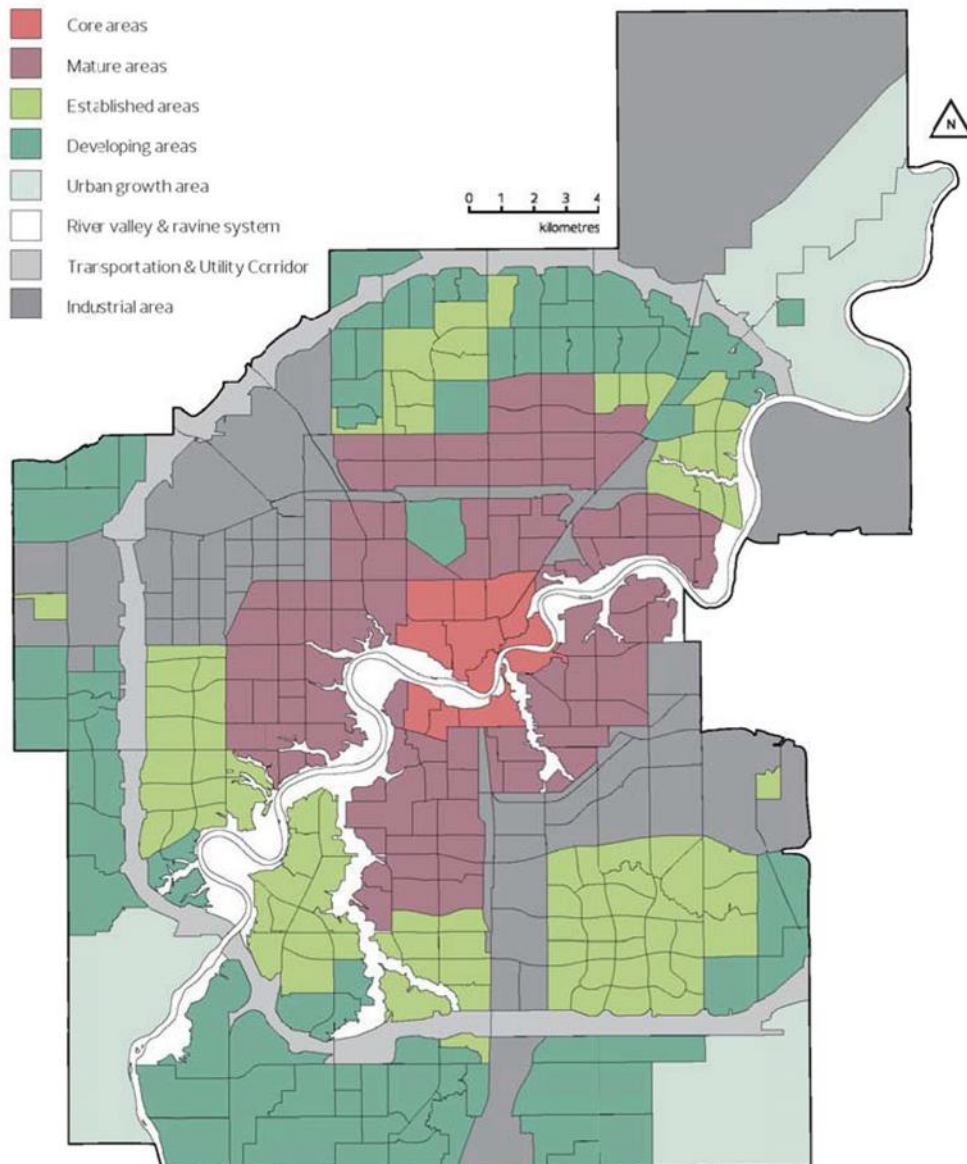
The criteria for both the modernization and new construction projects are aligned with the provincial capital funding criteria (Attachment III – Excerpt from *Alberta School Capital Manual, March 2015*). The following map includes all projects on the aggregated list of capital priorities.

Aggregated Capital Priorities





MAP 1.1
NEIGHBOURHOOD
CLASSIFICATION



Neighbourhood Classifications in this report are as per "The Way We Grow" Municipal Development Plan (2008) unless otherwise noted.
Minor variances may occur due to land use and existing bylaws.

4.1 School Capital Funding Priorities

School capital projects are reviewed and prioritized by Education, with technical input from Infrastructure, prior to being submitted to the government's capital planning process led by Infrastructure.

The projects identified in the Three-Year Capital Plans should include sufficient information to support the jurisdictions' priority ranking. Projects are first reviewed for accuracy and clarity, and staff from Education's Capital Planning Sector and Infrastructure's Learning Facilities Branch may meet with school jurisdictions to obtain further information as required.

Partnerships have become an important component of the capital planning submission. Please see section 3.3 for partnership considerations.

Education then prioritizes project requests by first considering school jurisdiction priorities and then the following criteria:

Health and Safety – Impact on health and safety of occupants of not proceeding with the project (e.g., replacement or essential modernization to correct unsafe conditions or prevent a major building failure).

Building Condition – Facility audit scores and the facility condition evaluation is a key tool for government and school boards' long-term capital planning processes. It assists with determining priorities for investing in maintenance, upgrades and new infrastructure. Reviews are ongoing within a five-year cycle so that each school is re-evaluated five years following its last review. The evaluation report generated from each review provides a "snapshot" of the physical condition and building systems at that specific point in time. The review anticipates the amount and cost of maintenance work that may be required over the next five years to keep the school in good condition.

Utilization Rates – The utilization formula is used as a measure of the relative occupancy levels of a school. When a facility reaches or exceeds a utilization of 85 per cent this indicates that a capital expansion may be considered. See section 9.3 for more information on the utilization formula. A high utilization rate at a school will not automatically result in the approval of additional infrastructure. Demographic trends, total utilization of the area, funding considerations and overall provincial priorities also need to be taken into consideration, along with the relative priorities for school capital projects identified by each of the school jurisdictions in their Three-Year Capital Plans.

Enrolment Projections – Trends and subsequent school board plans for the accommodation of students.

Education Program Delivery and Impact – Alignment with the direction the board has described in the Three-Year Education Plan and the importance of the project to achieving ministry program delivery requirements.

Site Readiness – An appropriately sized site that is serviced and has appropriate access should be available.

Infrastructure Performance – Recognition of infrastructure that is generally in greater need of attention due to poor functionality or poor physical condition; or that high utilization results in the need to adjust program delivery capacity.

Additional Information, including opportunities for partnership/collaborations between one or more school jurisdictions and/or other partners and other supplementary information such as studies, regional plans.

Education then prepares the annual submission for the provincial Capital Planning Prioritization Process.

4.2 Approval of Projects

Education and Infrastructure will send a letter to the school jurisdictions, notifying them of their approved school building projects and approved funding.

5. Project Implementation

5.1 Limits of Approval

In addition to the approval notice letter forwarded to the board chair, the school jurisdiction superintendent will receive the budget and any associated information applicable to the approval, such as file number, fiscal year and any special conditions specific to the project or advance project funding from Education and Infrastructure.

Any contemplated changes to the project scope or costs require specific approval before proceeding. This includes any contemplated increases to the school building area beyond the approved area.

5.2 Project Delivery

The decision to pursue a grant funded versus an Infrastructure managed project will be made by Education and Infrastructure, with input from school jurisdictions. Education and Infrastructure will determine if some projects can be bundled and delivered using alternative approaches.

5.3 Prior to Project Start-up

After a project is announced there is critical work that a jurisdiction must finalize, even before the delivery method has been determined. This work will have been completed for the capital plan submission, but the following should be finalized.

- definition of the program requirements
- capacity and grade configuration
- ensuring site readiness, which includes serviced sites, site access and size considerations
- school design, including the possible use of a standard design.

Regardless of the project delivery approach, all capital projects must abide by legislation and requirements related to procurement and construction. This includes, but is not limited to the New West Partnership Trade Agreement (NWPTA), and Agreement on Internal Trade (AIT).