

**DATE:** March 22, 2022

**TO:** Board of Trustees

**FROM:** Darrel Robertson, Superintendent of Schools

**SUBJECT:** Three-Year Capital Plan 2023–2026

**ORIGINATOR:** Kathy Muhlethaler, Assistant Superintendent

**RESOURCE STAFF:** Shauna Bland, Josephine Duquette, Terri Gosine, Kim Holowatuk, Scott Humphrey, Roland Labbe, Valerie Leclair, Andrew Lowerre, Shaminder Parmar, Jennifer Thompson, Christopher Wright

**REFERENCE:** [Infrastructure Planning Principles Policy \(EA.BP\)](#)  
[Strategic Plan 2018–2022](#)  
[Three-Year Capital Plan 2022–2025](#)  
[Ten-Year Facility Plan 2023–2032](#)  
[Information Update to the Ten-Year Facilities Plan 2020-2029](#)  
[Government of Alberta School Capital Manual - Chapter 2](#)

## ISSUE

The Province requires a Division's Three-Year Capital Plan, to be approved by the Board of Trustees, to be submitted to Alberta Education by April 1 annually.

## BACKGROUND

The current Three-Year Capital Plan 2022–2025 was approved by the Board of Trustees on March 9, 2021. Two school capital projects for the Division approved from previous Three-Year Capital Plan submissions are under construction. These projects are being managed by the Province.

School Name	Type of Project	Status of Construction	Scheduled Opening
Joey Moss School (K–9)	New	Construction	Fall 2022
Southeast High School (The Meadows 10–12)	New	Construction	Fall 2024

No additional new school or modernizations projects are currently funded for design or construction. In fall 2021, the Division completed five school capital projects, which were approved from previous Three-Year Capital Plans. The projects included two new schools, two replacement schools, and one school modernization/addition. The Division managed all five projects.

School Name	Type of Project	Opened
Aleda Patterson School (K–3)	Replacement	Fall 2021
Alex Janvier School (4–9)	Replacement	Fall 2021
Highlands School (K–9)	Modernization / Addition	Fall 2021
Dr. Anne Anderson School (10–12)	New	Fall 2021
Garth Worthington School (K–9)	New	Fall 2021

## Planning Context

The strategic direction for Division facility planning is outlined within the Ten-Year Facility Plan 2023–2032.

The Division's enrolment for the 2021–2022 school year increased by 1,978 students or 1.9 per cent from the previous school year. This near normal increase was anticipated by Administration in the previous Three-Year Capital Plan, based on current conditions, and expected growth over the next three years. Enrolment growth this year has been supported by rebounding immigration, steadily increasing job opportunities and growth in the local economy, strengthened by the recovering energy sector.

Date	Total Enrolment	Change (%)	Change (total students)
2017–2018	98,914	+3.3%	+3,282
2018–2019	101,865	+2.9%	+2,951
2019–2020	104,930	+2.9%	+3,065
2020–2021*	103,655	-1.2%	-1,275
2021–2022	105,633	+1.9%	+1,978

\*Start of the COVID-19 pandemic

## RELATED FACTS

- The Three-Year Capital Plan is required to be approved by the Board of Trustees annually and submitted to the Province prior to April 1 of each year.
- The format of the Three-Year Capital Plan focuses on the identification and prioritization of capital priorities for the Division.
- The Division is in the process of completing two new school capital projects approved from previous Three-Year Capital Plans (the new K-9 Joey Moss School in the Keswick neighbourhood and a new high school in The Meadows plan area).
- No additional projects have been funded for construction from the previous Plan submission.
- Only one aggregated list of project priorities, combining new construction with modernization/replacement priorities, can be submitted to the Province.
- The requirement to blend new construction priorities with modernization/replacement priorities in a single aggregated list creates a situation where serving new communities competes against mature areas of our City, and works against the principle to provide equitable access to modern, high quality learning environments regardless of where students live.
- In each of the three years of the Plan, new construction priorities are now ranked ahead of modernization/replacement projects as a result of recent provincial comments related to capital planning.
- This Plan introduces an additional new construction priority in Year 3 of the Plan, to accommodate growth in the developing community of The Orchards (K–9).
- No new modernization or replacement school projects for the Division are currently funded by the province; therefore, no changes are proposed for the ranking of modernization/replacement priorities.
- Ongoing and predictable funding of modernizations and replacement projects is required to address the Division's growing deferred maintenance deficit.
- Requests for additional space through the addition of modular classrooms occurs through a separate Provincial process, typically submitted by November 1 annually.

## RECOMMENDATION

**That the Draft *Three-Year Capital Plan 2023-2026* be approved for submission to the Provincial Government.**

## CONSIDERATIONS and ANALYSIS

The capital priorities in this proposed Three-Year Capital Plan (Attachment I) align with the Division's Infrastructure Planning Principles, the Strategic Plan 2018–2022, and Ten-Year Facilities Plan 2023–2032.

The Division expects enrolment growth to continue to put pressure on existing capacity as enrolment growth is expected to return to pre-pandemic levels. Much of the student residency growth will be focused in new growth areas, with some mature and developed communities seeing stabilization of student residency partially attributable to infill and intensification projects. Funding for modernization projects and annual infrastructure grants (IMR - Infrastructure Maintenance and Renewal and CMR - Capital Maintenance and Renewal) funding has been consistently below levels required to maintain optimal learning environments within the Division's aging infrastructure. The uncertainty of access to capital funding creates challenges in prioritizing projects for both new construction and the modernization/replacement of schools.

### Capital Planning Methodology

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 other data sources, and analysis of development and student residency data that includes, but is not limited to:

- number of existing and projected students residing in an area
- pace of development and the amount of development remaining in an area
- utilization rate of schools to which students residing in the area are designated
- average distance traveled by students to their designated school
- impact of recent or projected changes in capacity (e.g., recently constructed schools)
- site readiness of the proposed project site as defined by the Province

### New Construction Considerations (Attachments II and IV)

Pressure for new schools in developing areas is expected to continue, as the majority of projected new students will reside in developing areas where schools are at or nearing capacity. All of the requests for new construction are located in developing neighbourhoods, with most being in the southwest and west areas of the City. Students from new growth areas 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 the logistical and cost-related challenges that families and the Division experience regarding student transportation. Additional infrastructure to accommodate students through modular classroom additions is managed through a separate request process annually.

The Plan includes ten priorities in newly developing areas. The Plan includes a new construction priority in The Orchards neighbourhood. Six proposed new school construction projects in the neighbourhoods of Aster, Crystallina Nera West, Glenridding Heights, Riverview, and Rosenthal are also recommended to rise in priority. This highlights the urgency in required capital funding to accommodate students in developing communities. With schools in the southeast sectors already experiencing high utilization, new residential development in these and surrounding neighbourhoods will increase accommodation pressures at existing school sites. The Division will continue to monitor new growth expected to occur in the Decoteau, Horse Hill and Riverview areas, as well as planned future growth in southeast Edmonton.

**Modernization/Replacement Project Considerations** (Attachments III and V)

Funding for modernization project funding and annual capital grants (CMR and IMR) has been consistently below levels required to prevent deferred maintenance from increasing within the Division's aging infrastructure. The following factors are used to prioritize modernization/replacement projects: current and projected student enrolment, school utilization, deferred maintenance, building replacement costs, Facility Condition Index and community consultation. Consistent enrolment in core and mature areas, combined with aging infrastructure, supports the need for the modernization and replacement priorities included in the Plan.

The modernization/replacement project priorities remain unchanged from the previous capital plan, as there has been no funding announced for this category of projects since March 2018. Delton and Spruce Avenue replacement school projects remain as the Division's first and second modernization/replacement priorities, respectively. The Spruce Avenue School replacement project has been in 15 previous capital plans (going back to 2008), while the Delton School replacement project has been in 13 previous capital plans (going back to 2010). Both projects are expected to continue to serve large geographic areas with a vulnerable student population, and are the receiving schools established through several past school closures and consolidations. Replacing the aging infrastructure at these two sites will ensure that students in these areas have equitable access to high-quality learning environments, to achieve the Board's intended goal of enhancing educational programming opportunities for students attending schools in the City's core. Accessibility, safety, and building condition challenges remain for these two schools. In addition, both schools will serve portions of Blatchford and the Edmonton Exhibition Lands once housing development is realized.

The Plan continues to include major modernizations for three high schools that have yet to receive any significant modernization despite their age, as well as four additional aging schools. The two unfunded Space for Students in Mature Communities initiatives in the city's mature areas of Britannia and Rosslyn remain as capital priorities. A preferred consolidation concept for the Britannia cluster was identified and approved by the Superintendent in the fall of 2018. The approved concept would consolidate Brightview, Britannia, Mayfield and Youngstown schools into a new Pre-Kindergarten – Grade 3 school on the Mayfield School site and a new K-9 school on the Britannia School site. This proposed consolidation, as well as a yet to be determined configurations for the Rosslyn cluster, remain unfunded. Investment in school infrastructure in maturing neighbourhoods is important to ensure the Division is not faced with difficult decisions related to sudden reductions in capacity (e.g., component failure and building issues). This is especially the case in areas of the city where relatively high levels of existing capacity are in the form of older modular classrooms, which have shorter life cycles than typical school capacity.

The average age of an operational school in the Division is 47 years old, 149 buildings in Division inventory were built prior to 1971. Due to many schools being built in the same era, a large cohort of schools will likely require emergent facilities funding at the same time. These aging components and a shrinking amount of capital funding to address them in combination contribute to the mounting deferred maintenance the Division is facing, estimated to reach the \$1.0 billion value by 2029.

In order to reflect the Division's ongoing commitment to address its aging infrastructure in mature communities, one additional cluster placeholder is included in the list of priorities to support possible outcomes from potential future school consolidation discussions. Provincial funding support for replacement schools, as part of the Division's Mature Community discussions, is a critical component to meaningful community involvement. Stakeholders must see that improved learning environments, sustainable programming, and community reinvestment can result from their active collaboration in the process.

Ongoing and predictable funding of modernizations and replacement projects would align with comments in the McKinnon Report which: *“strongly encourage the Government of Alberta to establish a stable and sustainable level of annual capital spending and put an end to the ‘boom and bust’ cycles.”*

### **Aggregation and Provincial Consideration**

The Three-Year Capital Plan 2023–2025 outlines the Division’s capital priorities for the next three-year period. The Plan reflects capital investment in both mature areas and new growth areas. It includes a breakdown of project costs and demonstrates the Division is able to deliver projects during the three-year period. In each of the three years of the Plan, new construction priorities are ranked ahead of modernization/replacement priority as a result of recent messaging by the Province. The requirement to blend priorities into a single aggregated list for large metro school jurisdictions creates a situation where serving new communities competes against mature areas of our City. This works against the principle to provide equitable access to modern, high-quality learning environments regardless of where students live. It also does not align with objectives in Edmonton’s City Plan to intensify mature areas, and see a greater percentage of new residents reside in these communities.

Once approved, the priorities and supporting documentation are entered into the provincial database system, which includes copies of provincially required Site Readiness Checklists for new or replacement school projects identified in Year 1 of the submission. Alberta Education reviews and prioritizes the Division’s school capital projects among all school divisions in the province, in accordance with their criteria as listed in the *Government of Alberta School Capital Manual – Chapter 2* (Attachment VI): building condition, community renewal, declining demographics, enrolment pressures, education functionality and programming, health and safety, legal requirements. Their review will also include any additional information, such as regional plans or partnership opportunities.

### **NEXT STEPS**

The Three-Year Capital Plan 2023–2025 will be submitted to Alberta Education by April 1, 2022, for provincial consideration of future capital funding announcements.

### **ATTACHMENTS and APPENDICES**

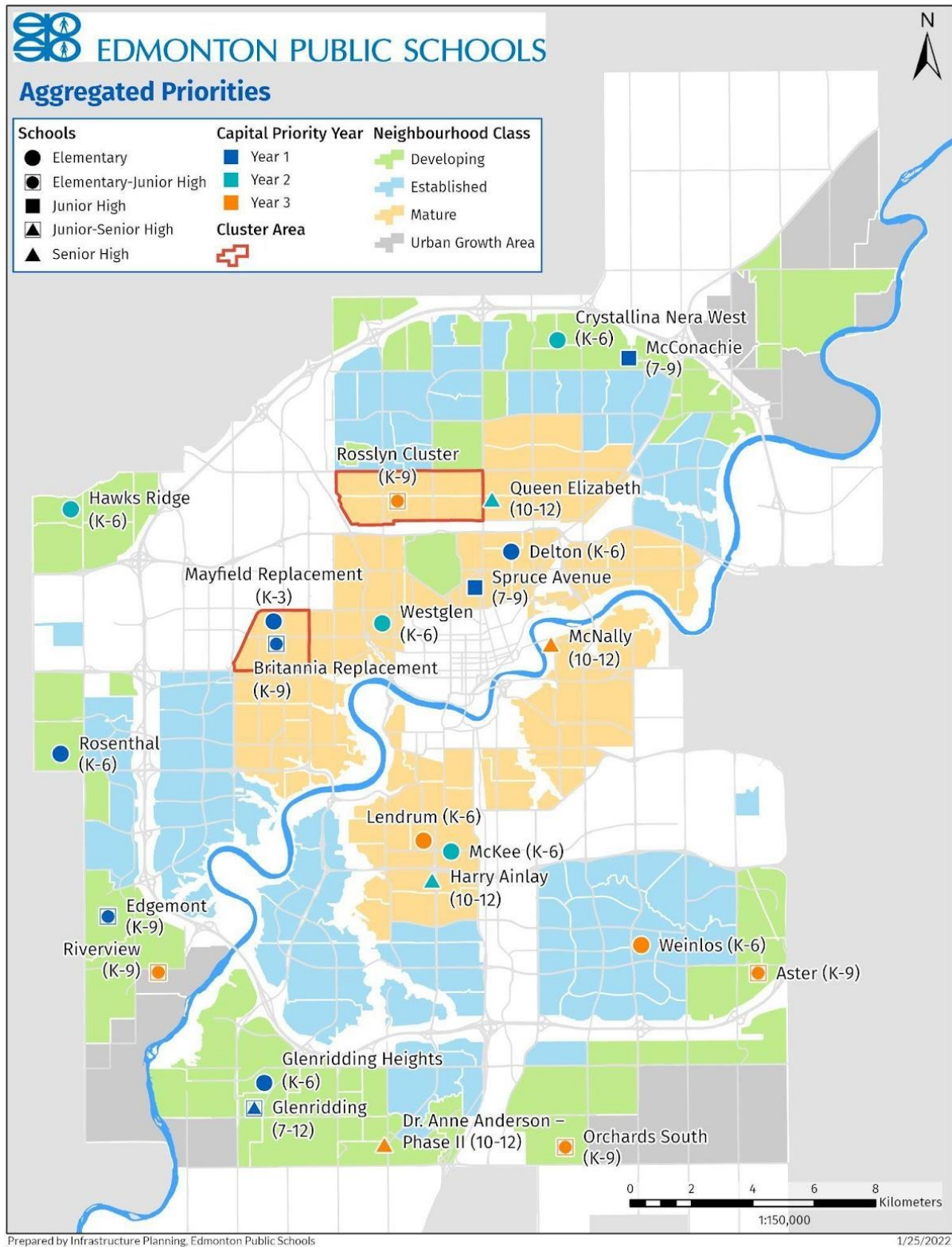
ATTACHMENT I	Three-Year Capital Plan Aggregated List of Priorities
ATTACHMENT II	Proposed New Construction Priorities
ATTACHMENT III	Proposed Modernization/Replacement Priorities
ATTACHMENT IV	Proposed Year-One New Construction Priorities - Additional Information
ATTACHMENT V	Proposed Year-One Modernization/Replacement Priorities - Additional Information
ATTACHMENT VI	Government of Alberta School Capital Manual - Chapter 2.0

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## Three Year Capital Plan Aggregated List of Priorities 2023–2026

Priority 2022– 2025	Priority 2023– 2026	Aggregated List of Priorities	Capacity	Sector	Cost (millions)
<b>Year 1</b>	<b>Year 1</b>				<b>\$273</b>
4	1	Glenridding Heights 7–12	2,400	SW2	\$78
10	2	Rosenthal K–6	650	NW	\$22
3	3	McConachie 7–9	950	N	\$36
6	4	Edgemont K–9	950	W	\$34
9	5	Glenridding Heights K–6	650	SW2	\$22
1	6	Delton Replacement K–6	650	C	\$22
2	7	Spruce Avenue Replacement 7–9	450	C	\$14
5	8	Space for Students in Mature Communities Britannia Cluster: (Mayfield Replacement PK–3 and Britannia Replacement K–9)	1,100	NW	\$45
<b>Year 2</b>	<b>Year 2</b>				<b>\$71</b>
13	9	Hawks Ridge K–6	650	NW	\$22
21	10	Crystallina Nera K–6	650	N	\$22
7	11	Queen Elizabeth Modernization/Replacement	TBD	N	TBD
8	12	Harry Ainlay Modernization	TBD	SW1	TBD
11	13	McKee Modernization/Replacement	350	SC	\$13.5
12	14	Westglen Modernization/Replacement	350	C	\$13.5
<b>Year 3</b>	<b>Year 3</b>				<b>\$197.5– \$208.5</b>
20	15	Aster K–9	950	SE1	\$34
19	16	Riverview K–9	950	W	\$34
17	17	Dr. Anne Anderson School Addition	600	SW2	\$11
-	18	The Orchards South K–9	950	SE1	\$34
14	19	Space for Students in Mature Communities Rosslyn Cluster: Concept to be Determined	1,800–2,400	N	\$62–73
15	20	Lendrum Modernization/Replacement	350	SC	\$9
16	21	Weinlos Modernization/Replacement	350	SE1	\$13.5
18	22	McNally Modernization/Replacement	TBD	SC	TBD
22	23	Space for Students in Mature Communities Project: Cluster Location TBD	TBD	TBD	TBD

## Aggregated Priorities Map

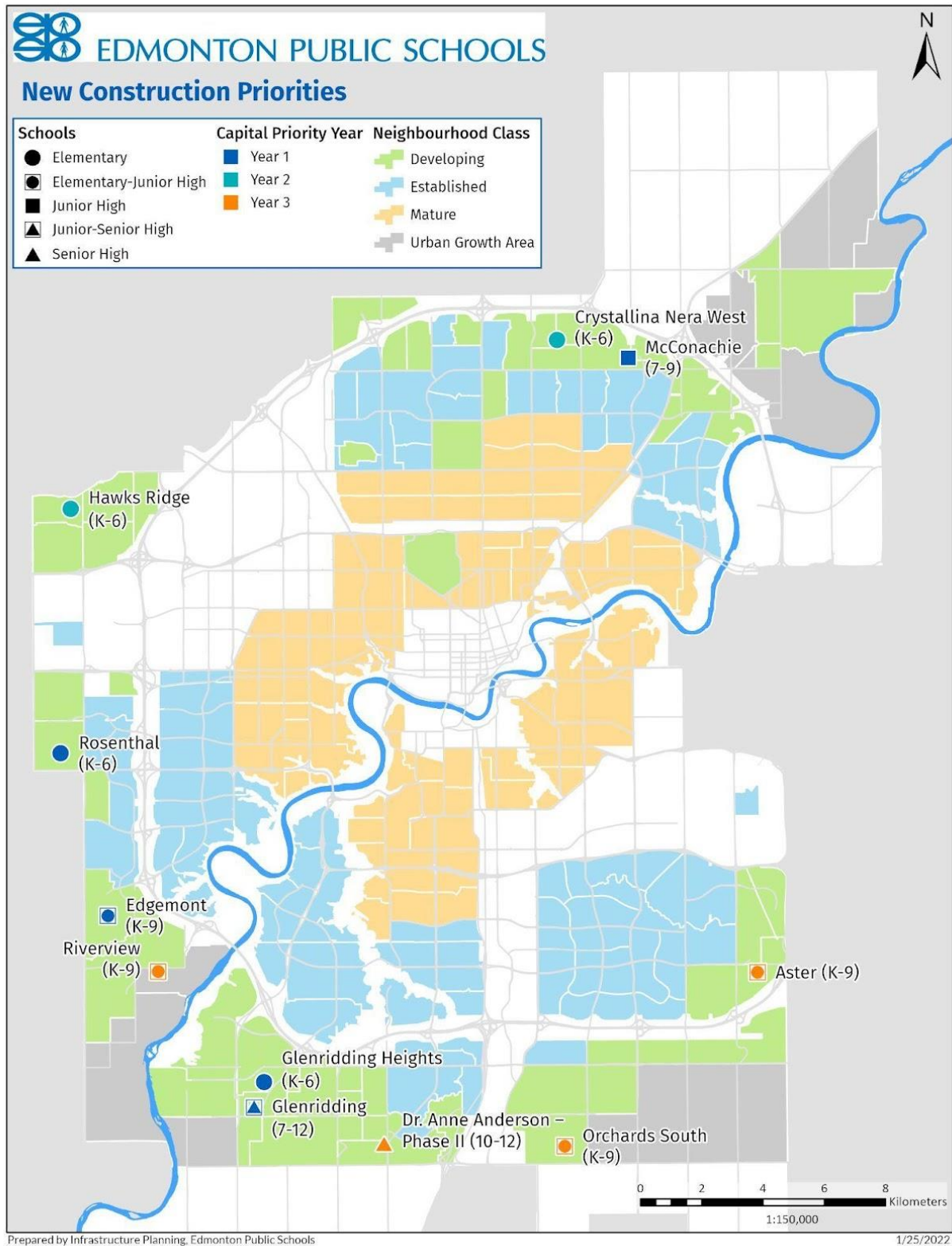


**Proposed New Construction Priorities 2023–2026**

<b>Priority 2022–2025</b>	<b>Priority 2023–2026</b>	<b>New Construction Project Location</b>	<b>Capacity</b>	<b>Sector</b>	<b>Cost (millions)</b>
<b>Year 1</b>	<b>Year 1</b>				<b>\$192</b>
2	1	Glenridding Heights 7–12	2400	SW2	\$78
5	2	Rosenthal K–6	650	NW	\$22
1	3	McConachie 7–9	950	N	\$36
3	4	Edgemont K–9	950	W	\$34
4	5	Glenridding Heights K–6	650	SW2	\$22
<b>Year 2</b>	<b>Year 2</b>				<b>\$44</b>
6	6	Hawks Ridge K–6	650	NW	\$22
10	7	Crystallina Nera K–6	650	N	\$22
<b>Year 3</b>	<b>Year 3</b>				<b>\$113</b>
9	8	Aster K–9	950	SE1	\$34
8	9	Riverview K–9	950	W	\$34
7	10	Dr. Anne Anderson School Addition	600	SW2	\$11
-	11	Orchards South K–9	950	SE2	\$34



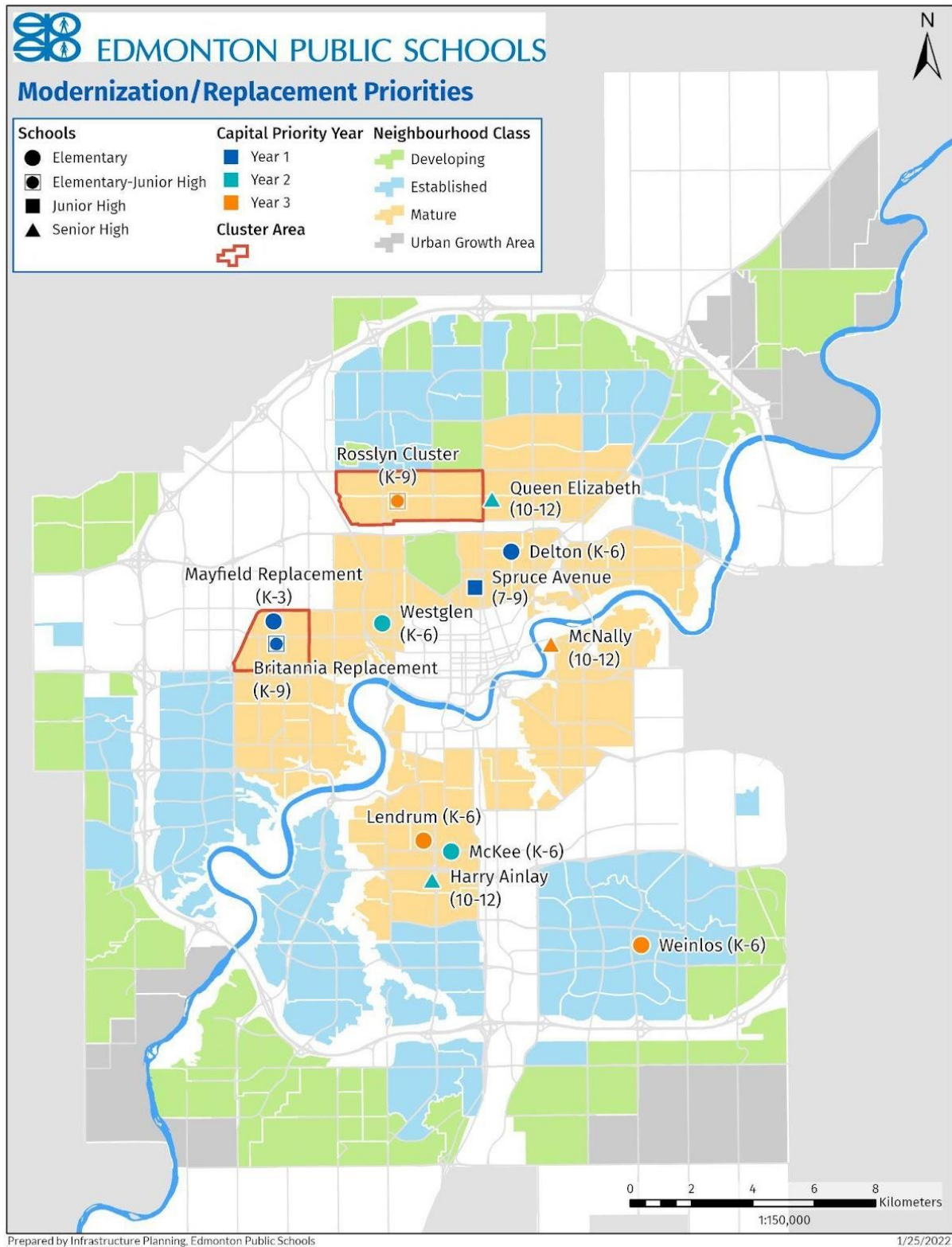
## New Construction Map



**Proposed Modernization/Replacement Priorities 2023-2026**

<b>Priority 2022– 2025</b>	<b>Priority 2023– 2026</b>	<b>Modernizations/Replacements</b>	<b>Capacity</b>	<b>Sector</b>	<b>Cost (millions)</b>
<b>Year 1</b>	<b>Year 1</b>				<b>\$81</b>
1	1	Delton Replacement K–6	650	C	\$22
2	2	Spruce Avenue Replacement 7–9	450	C	\$14
3	3	Space for Students in Mature Communities Britannia Cluster: Mayfield Replacement PK–3 and Britannia Replacement K–9	1,100	NW	\$45.1
<b>Year 2</b>	<b>Year 2</b>				<b>\$27</b>
4	4	Queen Elizabeth Modernization/Replacement	TBD	N	TBD
5	5	Harry Ainlay Modernization	TBD	SW1	TBD
6	6	McKee Modernization/Replacement	350	SC	\$13.5
7	7	Westglen Modernization/Replacement	350	C	\$13.5
<b>Year 3</b>	<b>Year 3</b>				<b>\$84.5–\$95.5</b>
8	8	Space for Students in Mature Communities Rosslyn Cluster: Concept to be Determined	1,800–2,400	N	\$62–73
9	9	Lendrum Modernization/Replacement	350	SC	\$9
10	10	Weinlos Modernization/Replacement	350	SE1	\$13.5
11	11	McNally Modernization/Replacement	TBD	SC	TBD
12	12	Space for Students in Mature Communities Project: Cluster Location TBD	TBD	TBD	TBD

## Modernization/Replacement Map

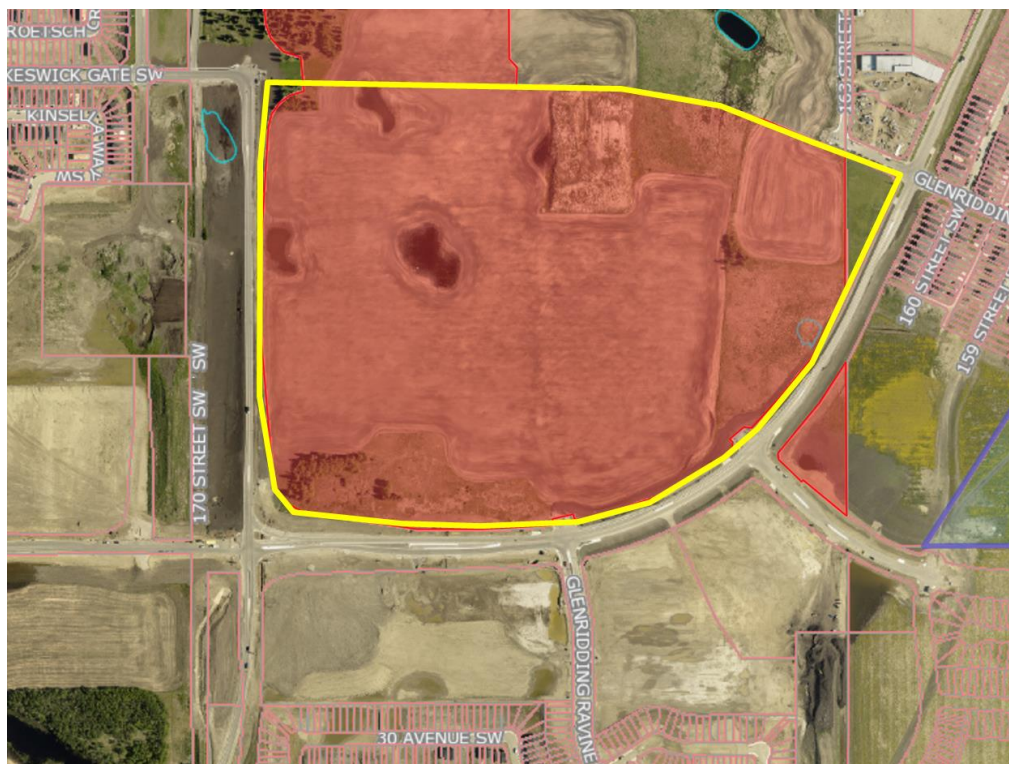




### **Proposed Year-One New Construction Priorities – Additional Information**

#### **Windermere District Park - Glenridding Heights New Construction 7-12:**

- Neighbourhoods in the Windermere area have experienced rapid growth since 2010.
- The rate of development remains high, with continued development in Keswick, Glenridding Heights and Glenridding Ravine neighbourhoods.
- Junior high utilization in the sector is very high.
- Windermere area neighbourhoods that could populate this school include junior high residents in Windermere Estates, and high school residents in Ambleside, Keswick, Glenridding Heights and Glenridding Ravine, Windermere Estates and the future Windermere Neighbourhood 5.
- This school would provide relief on Lillian Osborne School, which is operating over capacity and is instituting a lottery process to control enrolment, as well as other neighboring high school with high utilization rates, including Harry Ainlay, Jasper Place, and Strathcona schools.
- The new Dr. Anne Anderson High School in Heritage Valley added nearby capacity but is anticipated to be fully utilized within two years, and will, therefore, not be able to accommodate students from Windermere Area neighbourhoods.
- High schools in south Edmonton are nearing their capacity and ability to accommodate students from their respective attendance areas.
- New high schools are required to increase capacity for current and future students in south Edmonton.
- A high school in the neighbourhood would significantly reduce commute times for students residing in the Windermere Area who are attending Harry Ainlay, Jasper Place, Lillian Osborne, and Strathcona high schools.
- The Windermere District Park site is owned by the City of Edmonton and the City will commence sports field and park development to accommodate a funded school project.



### Rosenthal New Construction K-6:

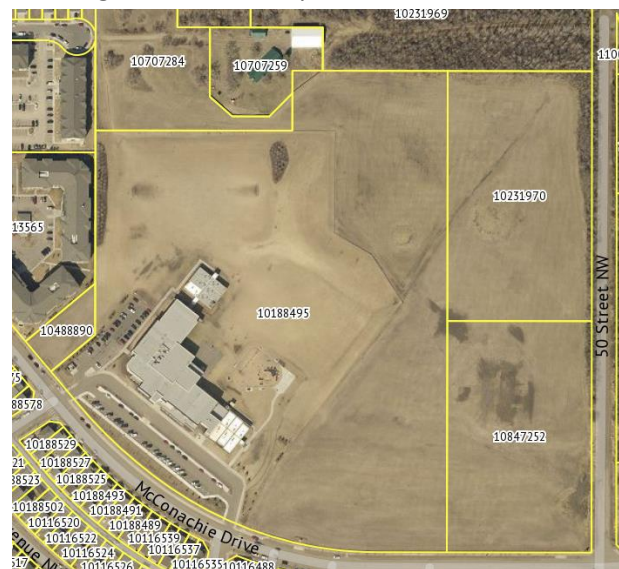
The rate of development in Rosenthal neighbourhood is accelerating and there is a significant number of lots remaining to be developed.

- The neighbourhood will see a significant increase in student generation in the coming years.
- Utilization of space in the sector and in nearby schools is high.
- LaPerle School receives elementary students from the neighbourhood, and is running short on space to accommodate a growing demand.
- David Thomas King School in the adjacent neighbourhood is now conducting a lottery for registrations, as there are more students than there is space available to accommodate them.
- A site for the school is owned by the City of Edmonton and available for construction.



### McConachie New Construction 7-9:

- McConachie and adjacent neighbourhoods have had a high rate of development since 2014.
- The neighbourhood will see a significant increase in student generation in the coming years.
- Neighbourhood residency is already high in lower grade levels.
- There is little junior high capacity available at the nearest schools to accommodate junior students who reside in the neighbourhood.
- A new junior high school would ease the enrolment pressures faced by other junior high programs in the north sector.
- The District park site is fully serviced and the City of Edmonton is currently in the process of completing site assembly and sports field development.

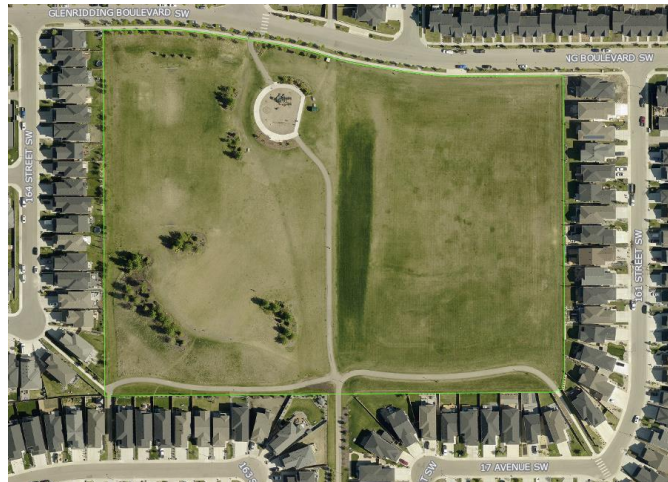


**Edgemont New Construction K-9:**

- Edgemont neighbourhood has had a high rate of development since 2014, with a relatively high number of lots remaining to be developed.
- The pace of development in the neighbourhood has increased.
- The neighbourhood will see a significant increase in student generation in the coming years.
- Neighbourhood residency is already high.
- Utilization of space in the sector, nearby schools and schools receiving students from the neighbourhood is high.
- Resident students from the neighbourhood are designated to three different schools for elementary and junior high programming, and transportation complexities would be alleviated in delivering a new local school.
- Development has reached the future site and we anticipate it would be available in time for start of construction.

**Glenridding Heights New Construction K-6:**

- Glenridding Heights neighbourhood has maintained a high rate of development since 2014, although there are relatively fewer lots remaining to be developed.
- Dr. Margaret-Ann Armour School in the adjacent neighbourhood, the receiving school for this neighbourhood, is now conducting a lottery for registrations, as there are more students than there is space available.
- The neighbourhood is experiencing a significant increase in student generation expected to continue in coming years.
- Utilization of space in the sector and in nearby schools is high.
- A site for the school is owned by the City of Edmonton and available for construction.





## Proposed Year-One Modernization/Replacement Priorities - Additional Information

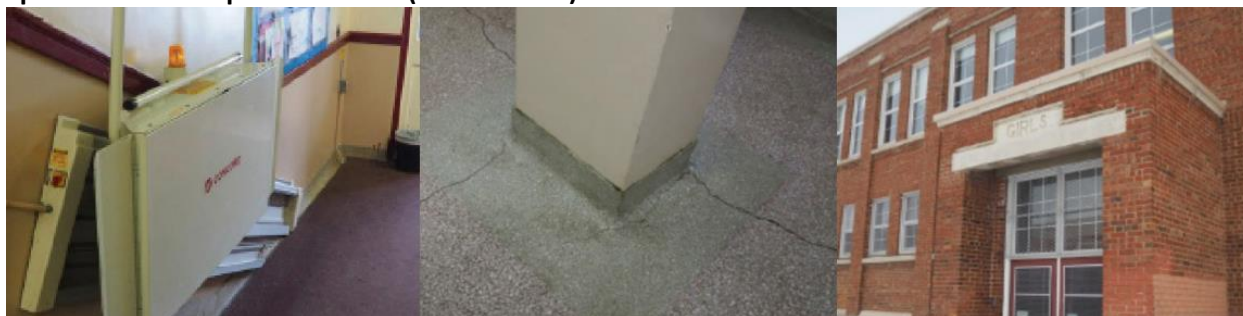
### Delton Replacement K-6 (Built in 1946):



Delton School serves a large area with a diverse and vulnerable student population.

- The School serves students and families with a range of programs; including full-day and pre-Kindergarten, Behaviour and Learning Assistance and Opportunity programs for students requiring specialized supports.
- Delton School receives students from three former school attendance areas that have been closed and redesignated to attend it.
- A new school at the Delton site would serve a large number of students who currently lack access to a modernized learning environment.
- Delton continues to rank as a year one priority due to its poor building condition.
- The building presents significant mobility challenges with the number of stairs that are required to navigate it, does not meet standards outlined in the School Capital Manual, has deficiencies in terms of mechanical and electrical systems, fire safety and barrier-free accessibility.
- Replacing the facility will reduce deferred maintenance and operational costs.
- Student population is projected to increase over the next decade, partially through development of the City's Exhibition Lands site and Blatchford.
- The City, through its community renewal program, is also investing in the area by upgrading pedestrian safety and road infrastructure and constructing a school bus lay-by at the school site.

### Spruce Avenue Replacement 7-9 (Built in 1929):



- Since the consolidation of McCauley and Parkdale Schools' junior high programs in 2010, Spruce Avenue is the only school offering a junior high program north of the city's core.
- This junior high is the last of six junior high schools that once served the current attendance area.
- The school has a large attendance area and serves a diverse and vulnerable student population.
- Spruce Avenue School offers regular, Literacy, and Behaviour and Learning Assistance programs for students requiring specialized supports.

- Spruce Avenue School presents mobility challenges with the number of stairs that are required to navigate it, does not meet space standards outlined in the School Capital Manual, has deficiencies in terms of mechanical and electrical systems, fire safety and barrier-free accessibility.
- Replacing the facility will reduce deferred maintenance and operational costs.
- A replacement school would give students access to modernized learning spaces and allow improved junior high program delivery.
- Student population is projected to increase over the next decade, partially through development of the City's Exhibition Lands site and Blatchford.
- The City completed a neighbourhood renewal project which improved pedestrian safety and road infrastructure around the school.

### **Space for Students in Mature Communities**

#### **Britannia Cluster: Replacement Schools (Mayfield PreK-3 and Britannia K-9):**

- Through extensive community engagement, which started in March 2016, 'Concept C' was selected as the preferred option to address the Division's facility and enrolment challenges in the Britannia-Youngstown, Mayfield and Canora neighbourhoods.
- The concept would result in four aging schools being combined into two new schools - a Pre-Kindergarten to Grade 3 school for 400 students at the Mayfield site and a K-9 school for 700 students at the Britannia site.
- The four existing schools combine to provide a range of programs for students, including three special needs programs, full-day and pre-Kindergarten, and Logos Alternative.
- Although the four existing schools have seen declining enrolment in past years, enrolment is projected to be stable over the next five years.
- Utilization is expected to remain below 85 per cent at all existing schools in their current configuration except Mayfield, which is expected to increase.
- The consolidation would eliminate deferred maintenance at the Mayfield and Britannia schools.
- The preferred concept addresses the challenges faced by the Division in terms of utilization, aging infrastructure, and costs of maintenance, operation, and configuration to modernized spaces.
- In 2016, the Division commissioned building condition audits for each building involved in the consolidation, and the cost to fix deficiencies (not including costs to reconfigure the facilities to meet 21st century learning standards) are detailed below.

<b>Total Deferred Maintenance – \$14,865,412</b>	<b>Estimated Deferred Maintenance – \$0</b>
Britannia - \$5,293,571 Youngstown - \$2,804,421 Brightview - \$3,097,564 Mayfield - \$2,382,059	New Mayfield K-3 - \$0 New Britannia K-9 - \$0
<b>Total Deferred Maintenance – \$13,577,615</b>	<b>Estimated Deferred Maintenance – \$0</b>



# Chapter 2

# School Capital Manual

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AUGUST 2020



School Capital Manual (August 2020) - Chapter 2

Published by Alberta Education

Date of publication August 2020

© 2020 Government of Alberta.

This publication is available online at

<https://open.alberta.ca/publications/school-capital-manual-updated-march-2015>

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## 2. Capital Planning Process

### 2.1 Provincial Capital Planning Process

The Government of Alberta uses a consolidated capital planning process. The purpose of the province wide Capital Planning process is to identify current and future capital needs and to develop strategies to address those needs in alignment with the Government of Alberta's (GOA) prioritization criteria.

Each ministry has a unique project delivery mandate and must develop the criteria, methodologies and strategies to fulfill that mandate, measure success and work for continuous improvement. While each ministry's criteria must align with overall government prioritization in order to fulfill their mandate, each ministry may/will place different emphasis on each of the GOA criteria.

Each ministry's capital project needs are evaluated and prioritized by ministry staff using the ministry's own program delivery criteria. In addition to evaluating the importance of a project to meet program delivery mandates, another critical factor for inclusion in a ministry's annual capital plan request is the readiness of the project to move forward in an effective and timely manner after approval. For Education, this means that the school jurisdiction must either have a suitable, serviced site or there must be a suitable site identified with a written commitment from the municipality to provide that site and service it before the scheduled start of construction. Additionally, any required access roadways and services need to be installed prior to tendering school construction.

Once the individual ministries have completed and submitted their Ministry Capital Plans, the Provincial Capital Planning group consolidates the requests of all ministries. Projects are then evaluated from a provincial standpoint for criticality, readiness, alignment with government priorities and with consideration for the budget allocation available.

The projects that are approved by Cabinet become part of that year's Provincial Capital Plan. Education is responsible for preparing and providing the approval letters that reflect the decisions made by Caucus.

### 2.2 Ministry's Capital Planning Process

School authorities are required to submit their capital project requests to Education by the April 1<sup>st</sup> submission deadline each year. Capital Planning staff review and evaluate project submissions using the ministry's criteria for program delivery and project drivers as outlined in Section 2.5 and the appendices of this document. Ministry staff provide recommendations to the ministry's senior

leadership team including the data analysis, project drivers, readiness, rationale and criticality of each project requested for possible inclusion in the current Ministry Capital Plan.

Once a decision is reached by the Education Minister, and in alignment with the submission deadlines provided annually by the Provincial Capital Planning team, the ministry finalizes and submits Education's Capital Requests into the province wide process for consolidation, further evaluation and funding consideration.

- The submission deadline is April 1 unless otherwise communicated in writing from the department.

When Education is advised of the decisions of Treasury Board and Finance, and Cabinet, approval letters are prepared and provided to school authorities for the capital requests that were approved for funding.

There are several distinct, but integrated components, outlined below that inform the School Capital Review and Prioritization Process.

**Capital Planning Process:**

- No significant change. This overview helps to provide context for readers.

## 2.3 Ten-Year Facilities Plan

The Ten-Year Facilities Plan provides a broad overview of the school jurisdiction's existing facilities, including facility age and condition, historical and current utilization and anticipated needs as a result of projected changes in enrolment. It assists each school jurisdiction, Education and Infrastructure to identify trends affecting long-range facility requirements and strategies to support the school jurisdiction's planned program delivery.

School jurisdictions are required to develop a Ten-Year Facilities Plan and be prepared to submit the plan to Education upon request of Capital Planning staff. A school jurisdiction should review its plan annually to confirm that it is up to date and relevant and that it is in alignment with their Three-Year Capital Plan and the individual project requests submitted in any year.

The Ten-Year Facilities Plan should include the following information:

- an overview of key strategies and objectives for the next ten years or longer;
- the jurisdiction's expected utilization rate, historical, current and projected enrolment (increase in enrolment that may lead to addition of space being required or decrease in enrolment that may lead to closure of programs or school buildings);
- modernization and/or replacement needs;
- grade structures and forecast of program changes requiring capital funding either under the modernization program to convert existing space, or construction under the expansion program to facilitate the new program(s) and technology;
- facility condition evaluation information; and,
- the need for capital funding to modernize or add space to the school(s) where students are being relocated.

## 2.4 Three-Year Capital Plan

Each year, school jurisdictions must assess their school capital needs and prioritize proposed projects based on the project drivers outlined in Section 2.5. The Three-Year Capital Plan must be approved by the board and the board's meeting minutes must identify the dated version of the plan that has been approved. Each individual capital project submission request provided to Education must be consistent in terms of priority and scope with the board approved plan.

There are typically hundreds of project requests made to Education each year. In order for Education staff to appropriately understand and assess the criticality of each project, it is important that project requests are clear and complete and that substantiating data is provided.

The project requests are prioritized with consideration for the following criteria:

- the need has been clearly defined and is supported by data and evidence;
- the scope of work has been clearly defined;
- the educational solution is important to meet the mandate of program delivery for the school jurisdiction and for the ministry;
- there is alignment between the estimated timeframes for the project delivery and the need for the project solution; and,
- the project would be able to move forward expediently if funding were approved.

**School Boards Capital Planning Process:**

- Ten-Year Facilities Plan – no significant changes
- Three-Year Capital Plan – no significant changes