



Learning Facilities

Minister's Symposium on Schools Implementation Plan

Recommendation Subcommittee Reports



Minister's Symposium Implementation Plan Executive Summary

INTRODUCTION

On December 5 and 6, 2001, the Minister of Infrastructure invited 500 school facility stakeholder representatives to participate in the Minister's Symposium on Schools "*Learning Facilities for Tomorrow's Communities*". The 422 delegates participated in round table discussions that centered on issues and decisional questions for the following three themes:

- Sustainable School Buildings
- Functionality and Utilization of Schools (School in the Community)
- Alternate Procurement Opportunities (P3s)

The Learning Facilities Branch assembled over 1,400 comments and recommendations that came out of the round table discussions. Five recommendations emerged from the comments:

- Sustainable School Buildings
- Functionality and Utilization (School in the Community)
- Planning and Design Process
- Alternate Procurement Opportunities (P3s)
- Use of School Reserves

The discussions and comments at the Minister's Symposium on Schools identified the "who", "what", "where" and "when". The five recommendations coming out the Symposium needed to identify the "how" with implementation strategies for the provincial government. The Learning Facilities Branch identified an Implementation Plan for the five recommendations.

PROCESS

The Minister's Symposium Implementation Plan established five subcommittees to review the recommendations and complete a report addressing the issues. Each recommendation subcommittee had a Learning Facility Branch liaison and an outside consultant to write the report. The subcommittees were chaired by an external consultant or a designated chair from within the Department of Infrastructure. The subcommittees were as follows:

- Sustainable School Buildings
 - Subcommittee Chair, John Gibson, Alberta Infrastructure
 - External Consultant, Martyn Phillips, Team Focus
 - Learning Facilities Branch Liaison, Doug Ramsey
- Functionality and Utilization (School in the Community)
 - Subcommittee Chairs and External Consultants, Sandra Woitas, Edmonton Public Schools; David Purdy, Simera Strategy Group
 - Learning Facilities Branch Liaison, Mike Irving



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- Planning and Design Process
 - Subcommittee Chair and External Consultant, David Ryder, Barr Ryder Architects
 - Learning Facilities Branch Liaison, Larry Wilson
- Alternate Procurement Opportunities (P3s)
 - Subcommittee Chair and External Consultant, Russell Anthony, Stantec Consulting
 - Learning Facilities Branch Liaison, Hilary Rose
- Use of School Reserves
 - Subcommittee Chair and External Consultant, Mike Davenport, Davenport and Associates
 - Learning Facilities Branch Liaison, Mike Irving

Sustainable School Buildings

The Sustainable School Buildings Report and Recommendations, recommends that the Provincial Government begin to put policies and processes in place to encourage sustainable planning, design and construction of school buildings.

The subcommittee focused its mandate on sustainable construction and building concepts, while acknowledging that sustainability is a process that begins at the inception of a project and carries through the planning, design, construction, warranty and post-occupancy review of a school building. The issues around sustainable programming and planning of a school building were covered by the Planning and Design Process Subcommittee and the Functionality and Utilization (School in the Community) Subcommittee.

The subcommittee proposes that the provincial government should be building schools that will meet the needs of the present without compromising the ability of future generations to meet their needs. The subcommittee recommends that the initiatives of the Green Building Council of Canada be implemented and the Leadership in Energy and Environmental Design (LEEDS) Rating Program be adapted to measure sustainability of school projects. The committee recommends Alberta Infrastructure establish LEEDS Accreditation as a minimum and target of LEEDS Silver rating for school buildings. As energy costs and material costs rise sustainable building will become increasingly viable and add value through lower energy and maintenance costs in the future.

The report recommends that Alberta Infrastructure begin to implement changes to the standard specifications and transfer between funding



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envelopes to work toward sustainable school buildings. Alberta Infrastructure should review the policies and any incentives put in place by the State of Minnesota and the City of Seattle to implement LEEDS Silver as the standard. Alberta Infrastructure should also review if there is a cost premium to implementing the LEEDS Silver Standard and if so what is the premium.

Functionality and Utilization (School in the Community)

The Functionality and Utilization (School in the Community) Report and Recommendations propose a framework that will support multi-use facilities. The subcommittee endorsed the integration of services within school facilities where appropriate. Life-long learning as proposed by Alberta Learning and its inherent expansion of services for better program delivery and the potential costs savings due to adjacencies etc., new school projects and school preservation projects should take into account the potential of one or more programs accommodated in a school facility. This builds on the philosophies and criteria of sustainable programming and planning of school facilities.

The framework developed in the report is to be used by school boards to review and develop applications for multi-use facilities accommodating integrated services (public-public partnerships). The framework uses the business case analysis model to provide a framework to test the viability of the proposed partnerships.

One of the major principles put forward by the subcommittee, similar to the Alternate Procurement Opportunities subcommittee, is that there needs to be the political and administrative will at the Ministerial and department level to support cross ministry programming and capital planning.

The report indicates that in order to have multi-use facilities that include partnerships and integrated programs, the Municipal Government Act (MGA) needs to be revised to broaden the definition of what programs/uses can be located on school reserve sites.

The framework developed by the Functionality and Utilization Subcommittee has been integrated as a part of the Planning and Design Process framework discussed in the Planning and Design Process Report.



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Planning and Design Process

The Planning and Design Process Report and Recommendations, proposes a planning design framework that can be used by boards from a projects inception through design, tender, construction, warranty and post-occupancy review. The framework closely links the school board's education plan with the capital plan. The report recommendations support the close ties between the built facility and the learning outcomes, which support the education plan and the K-12 curriculum.

The framework also supports the philosophy and criteria of sustainable planning and design through mechanisms for boards to identify early the possibility of partnerships both public-public and public-private for multi-use facilities as opposed to single purpose facilities, site selection, facility orientation on the site, "green" building components and systems, value management as a planning and design tool and business case analysis as a support and confirmation of the planning process.

The report recommends that government review approving projects in full with capital dollars flowed as required over the project life (milestones, such as planning, design, contract documents, tender, construction, warranty, and post-occupancy review). This will help boards with not only their individual project planning and 3-year capital plans but also their 10-year strategic facility plans. To further support the capital and project planning the report recommends that the School Facility Audits completed by Alberta Infrastructure be updated every five years as required.

The Planning and Design Process subcommittee indicated in the framework the importance of stakeholder consultation early in the process, with a provisory that the stakeholder consultation should not take over the planning and design process. The subcommittee saw value in the development of a stakeholder consultation framework and guide for school boards.

The Planning and Design Process framework if followed will save school boards time and capital dollars. As a project progresses through planning and design, thorough upfront planning will help prevent and address early issues and questions that come up later in the design and construction process, which cause delays in the project and often additional costs.



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Alternate Procurement Opportunities (P3s)

The Alternate Procurement Opportunities (P3s) Report does not make recommendations but identifies a framework for successful P3s as well as the impediments for successful completion of a public-private and a public-public partnership in Alberta. The report indicates that the Alberta Government needs to address the impediments prior to proceeding with a P3 project. The Recommendation Subcommittee also provided valuable input and recommendation on achieving a successful P3 project. Some of the subcommittees major points are:

- The Provincial Government should only enter into P3 arrangements that have been well thought out and have every opportunity of being successful. The Business Case Analysis will be a tool in identifying viable partnerships.
- Political leadership and a supportive administrative framework are required for a successful public-public and public-private partnership.
- The framework should include a review of the P3 arrangement to ensure that there is sufficient order of magnitude so that it is a win-win situation for both parties. The public partner gets value for money while the private partner enters into a rewarding commercial venture. Some private developers have indicated that the order of magnitude needs to be in the range of \$75 million.
- P3 projects should not jump queue of provincial priorities, but where there are opportunities for P3 arrangements that meet priority criteria the Provincial Government should take advantage of them.

The Business Case Analysis developed by Alberta Infrastructure will be a valuable tool in assessing partnership arrangements and value for money.

Use of School Reserves

The Use of School Reserves Report and Recommendations is based on the basic principle that states that reserve lands are provided once and if disposed of should be replaced. The major issue here being that the cash in lieu provided for reserve land is often based on unserviced land, which is not sufficient to purchase an equivalent amount of serviced land where the reserve land is deemed necessary. This is mainly an issue for urban areas rather than rural areas where "breathing spaces" are readily available.

The subcommittee agreed that with changing facility needs, and public-public and public-private partnerships, the use of reserve land needs to be



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addressed. In reviewing the Municipal Government Act (MGA) the subcommittee found that the term “school authority purposes” needed to be further defined and address “life-long learning” as defined by Alberta Learning.

The report indicates that the use of public-private partnerships in the procurement of school facilities is not an issue with the current MGA, provided the facility is used as a school and at the end of the lease the facility is turned over to the school board or a new lease is negotiated and the facility use remains as a school. The subcommittee indicated that this is a “funding issue” and not a “land use issue”.

The subcommittee agreed the MGA needs to address where there are other non-permitted uses on reserve land, such as a health authority clinic, a children's services office, public library, seniors' home, grocery store etc. If the non-permitted use is anticipated to be located permanently the report recommends that the portion of the site occupied by the non-permitted use be disposed of permanently by the school board as surplus to its needs. The land would then be taken out of the reserve land designation and the school board would hold title to the property. This is currently part of the MGA disposition of reserve land procedure.

The subcommittee did recommend temporary disposition and lease of reserve land to address surplus school facilities. This proposed revision to the MGA Disposition Procedure would allow school building envelopes to be leased out for a maximum of 25 years. At the end of the 25-year lease the land would revert back to reserve land and the use limitations identified in the MGA. The lease would be at market value for the land portion at a minimum and a percentage of the lease would be paid into the reserve fund. The use of the leased school and the school envelope would then be subject to municipal planning approvals.

The Alternate Procurement Opportunities Report and Recommendations and the Functionality and Utilization Report and Recommendations depend on the implementation of the Use of School Reserves Report and Recommendations and the revision of the MGA to be successful.