



Minister's Symposium on Schools

"Learning Facilities for Tomorrow's Communities"

Summary Report

Rationale

The continuing challenge facing the Minister of Infrastructure is to provide Alberta students with the best possible facilities today and tomorrow. The challenge includes designing, building and operating school facilities that evolve with the surrounding communities and meet the physical and technological challenges of the future within available resources.

The School Facilities Task Force Implementation Plan Report, released in November, 2001, addressed all 41 recommendations submitted to government. Although the report made a significant contribution to providing better school facilities, it also proposed further action to be taken.

The Symposium was a forum where representatives of professional organizations were encouraged to develop fresh ideas, create new solutions and think outside the box. The Symposium did not seek solutions to the issues identified.

Overview

On Wednesday, December 5, the Symposium opened with a presentation by David Purdy on the history of school facilities in Alberta. In the evening, the Minister hosted a dinner for the participants with Dr. Frank Peters delivering a dynamic and entertaining keynote address.

On Thursday, December 6, participants attended concurrent sessions in their theme of choice – Alternative Procurement Opportunities, Sustainable Development, or Functionality and Utilization. Most of the day was spent in small groups and round table discussions after expert speakers set the stage for discussions.

Theme One, Alternative Procurement Opportunities, focused on the concept of partnerships in building and operating school facilities.

Theme Two, Sustainable Development, focused on sustainable and innovative approaches to the design and construction of school facilities, considering value and environmental aspects.

Theme Three, Functionality and Utilization, studied the evolving role of schools within the communities they serve.

Prepared by:

Learning and Housing
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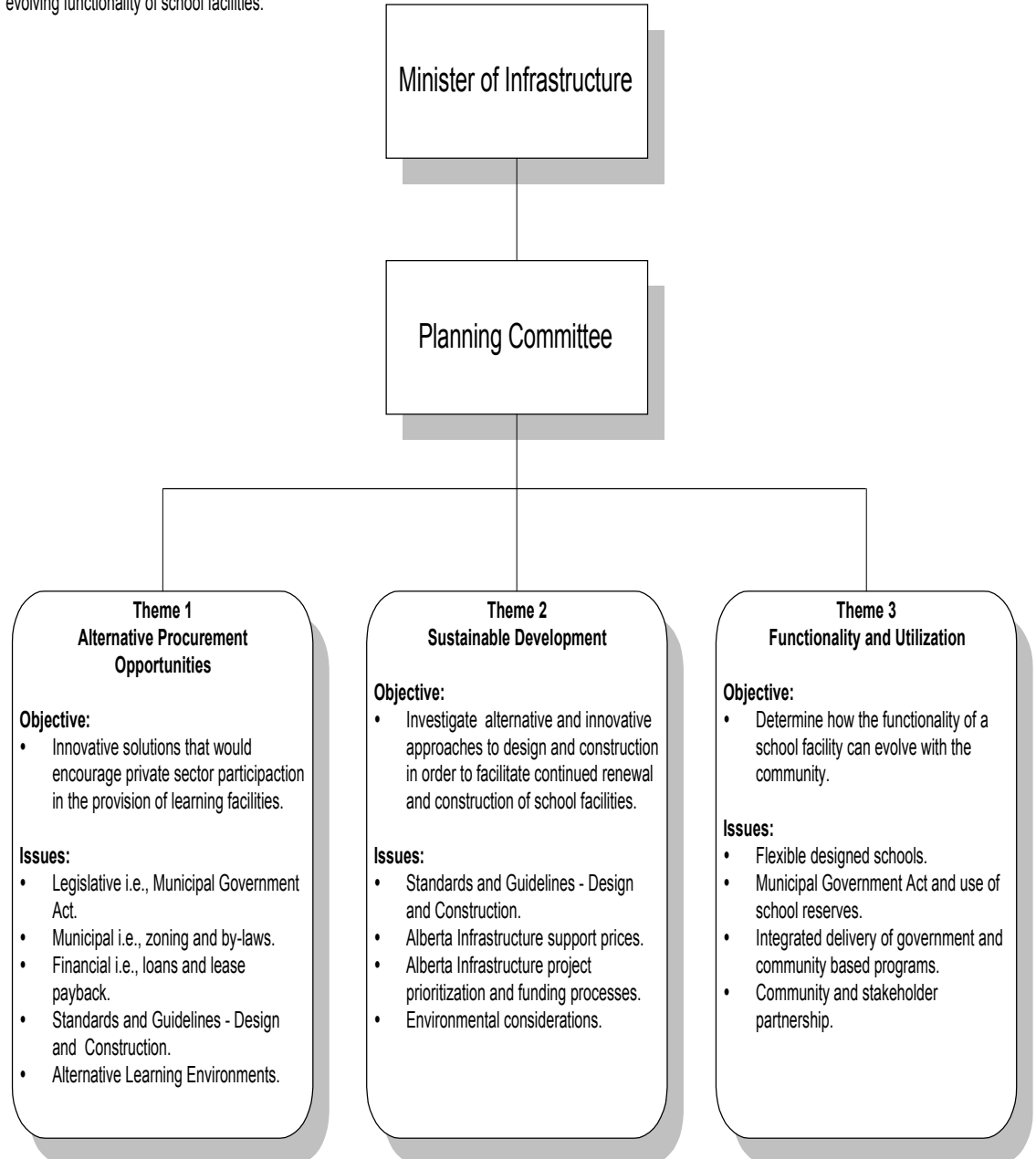
March, 2002

Organizational Structure

Objective: Propose to the Minister of Alberta Infrastructure alternative procurement opportunities, innovative approaches to design and construction and evolving functionality of school facilities.

ALBERTA INFRASTRUCTURE SCHOOLS SYMPOSIUM

ORGANIZATIONAL STRUCTURE



Theme 1 Alternative Procurement Opportunities

Objective:

- Innovative solutions that would encourage private sector participation in the provision of learning facilities.

Issues:

- Legislative i.e., Municipal Government Act.
- Municipal i.e., zoning and by-laws.
- Financial i.e., loans and lease payback.
- Standards and Guidelines - Design and Construction.
- Alternative Learning Environments.

Theme 2 Sustainable Development

Objective:

- Investigate alternative and innovative approaches to design and construction in order to facilitate continued renewal and construction of school facilities.

Issues:

- Standards and Guidelines - Design and Construction.
- Alberta Infrastructure support prices.
- Alberta Infrastructure project prioritization and funding processes.
- Environmental considerations.

Theme 3 Functionality and Utilization

Objective:

- Determine how the functionality of a school facility can evolve with the community.

Issues:

- Flexible designed schools.
- Municipal Government Act and use of school reserves.
- Integrated delivery of government and community based programs.
- Community and stakeholder partnership.

Theme One

Alternative Procurement

Session 1

Topic: "Benefits and Risks"

Presenter: Cliff Inskip is the Managing Director of Debt Capital Markets for CIBC World Markets in Toronto. He heads the CIBC World Markets activities in Canada with respect to structured debt capital financings, including project financing and leases, as well as debt capital market financings for school boards, universities, hospitals and other government supported sectors.

Decisional Question:

Partnerships for the procurement of schools: What is their role? What are the benefits and risks?

Context Setting Questions:

A partnership (P3) is a cooperative venture based on contractual obligations between one or more partners that meets clearly defined public needs through appropriate allocation of resources, risks and rewards. For schools, the definition may include public/private partnerships and public/public partnerships. Public/public partnerships involve various parts of the public sector: provincial government, local government, school boards, post-secondary institutions and other service providers. In the procurement of schools, is there a role for the private sector? Do partnerships save money? Are there non-financial reasons for using partnerships?

Symposium Feedback – Highlights:

- Need to effectively address educational needs and long-term community needs (school, adult education, community recreation, senior housing, retail, etc.).
- Need to clearly demonstrate benefits of the partnership process such as lower capital costs, lower operating costs, quicker delivery times, etc. Government may be able to borrow money more cheaply than the private sector but private partners may be better able to resolve facility construction and operation issues.
- Roles and responsibilities of each partner need to be clearly defined before entering into a partnership. Partnerships must not shift the responsibility for education from the province.
- Need to define and get agreement on risk assumed by each partner. If the arrangement is not properly structured the public sector may be taking the risk and the private sector the rewards.

Theme One

Alternative Procurement

Session 2

Topic: "Selection of Partner"

Presenter: Charles Clattenburg is the head of the School Facilities Branch, Department of Education, Nova Scotia. Mr. Clattenburg was involved in Nova Scotia's partnership program for the procurement of schools from its launch in the mid 1990s until its cancellation in 2000.

Decisional Question:

What criteria might be used for selecting a partner?

Context Setting Questions:

What good or bad experiences are you aware of in selecting a partner? Why? What could have improved the experience?

Symposium Feedback – Highlights:

- Financial stability.
- Proven record of performance and reputation.
- Track record of involvement and participation with community and key stakeholders in projects.
- Partners must share the same values and principles and have a win-win approach to the partnership.

Theme One

Alternative Procurement

Session 3

Topic: "The Partnership Procurement Process"

Presenter: George Armoyan is the principal of Kimberly-Lloyd Developments in Nova Scotia. He is also the owner of a number of businesses, primarily involved in real estate development and operations. He has been involved with Scotia Learning Centres, selected as the preferred partner to build 13 schools, totaling one million square feet, in conjunction with the Halifax Regional School board, Chignecto-Central School board, Conseil Scolaire Acadien Provincial and the Department of Education, Nova Scotia. Scotia Learning Centres will operate these schools for the next 20 years.

Decisional Question:

To what extent should Alberta Infrastructure be involved in the partnership procurement process?

Context Setting Questions:

What key considerations are you aware of to make the process successful? What is the role of government in the partnership procurement process?

Symposium Feedback – Highlights:

- Create a level playing field through establishment of provincial goals, standards and processes and monitor projects to ensure the public good is being maintained during the process and in the outcome of the project.
- Coordinate and maintain the government's financial commitment to the P3 process.
- Remove legislative and other roadblocks to productive partnerships and facilitate cooperation between all stakeholders (school board, municipal government, government departments, private partners, community, etc.).
- Design a P3 process template that will give boards maximum flexibility and autonomy but be prepared to help boards with the process as needed (procurement, contract administration, conflict resolution, etc.).

Theme Two

Sustainable Development

Session 1

Topic: "Environmental Sustainability"

Presenter: Peter Busby is an architect based in Vancouver, BC. He chairs the Sustainable Buildings Canada Committee and makes sustainable design his practice niche. He has had several buildings presented for the Canadian Green Buildings Team. He is one of the most experienced sustainable buildings designers in Canada and an experienced presenter.

Decisional Question:

To what extent should Alberta Infrastructure promote and support environmentally sustainable design for school facilities?

Context Setting Questions:

Environmental sustainability is based on meeting the needs of the present without compromising the ability of future generations to meet their needs. What are the obstacles to adopting environmentally sustainable design? What would be the benefits to us?

Symposium Feedback – Highlights:

- Designs should be sustainable. An environmental assessment system should be used to set goals. This should apply to portables and renovations not just new buildings. Design fees should provide incentives for meeting goals. A Pilot Project should be initiated.
- Designs should be flexible and promote multi-use facilities.
- Alberta Infrastructure/Government should educate and promote sustainable design, set benchmarking standards, provide leadership. Green guidelines should be considered.
- Consider funding (incentives) for sustainability. Trade capital for operating and maintenance costs by life-cycle costing i.e. make cost decisions on the basis of the life time costs such as operation and maintenance, not just initial capital cost.

Theme Two

Sustainable Development

Session 2

Topic: "Economic Sustainability"

Presenter: Tim Spiegel is a Cost Consultant based in Kelowna, BC. He has been involved in numerous cost-effective school projects. His expertise includes Property Development Consulting and Analysis, Cost Control, Financial Control and Monitoring, Value Analysis and Value Management, Quantity Surveying, Project and Construction Management, and Arbitration and Mediation for issues related to construction.

Decisional Question:

What steps might Alberta Infrastructure take to achieve better value for money in the design and construction of school facilities?

Context Setting Questions:

Focus on materials, systems, design processes, fee structures, and incentives. Are we getting good value today? What new options are available?

Symposium Feedback – Highlights:

- Revise fee structure to provide incentives for integrated design, low cost, life-cycle costing, sustainable design.
- Long-term planning for new and modernized schools requires stable funding.
- Incorporate Value Management in design, like life-cycle costing all issues related to value are considered. Value to include education functions. Funding must allow value decisions. There is value in aesthetics.
- Multi-functional facilities such as School/Community centres to expand use and value.

Theme Two

Sustainable Development

Session 3

Topic: "School Design Innovation"

Presenter: Gaylaird Christopher is an architect from California. He is a recognized expert in the planning and design of educational facilities. His experience includes individual buildings and institutional master plans that outline strategies for change and growth. He lectures to numerous educational and architectural organizations, and has authored many papers on innovations in educational architecture and creative funding techniques.

Decisional Question:

What innovative approaches to design and use of school facilities might be explored to get better value for money?

Context Setting Questions:

Focus on fundamental design choices such as opportunities for integration with community/private sector facilities, designing for multi-use, future re-use, relocatability, and prototypical design. Are our current schools cost effective and sufficiently flexible in their potential use? Are there opportunities for fundamental changes to the nature and design of our schools?

Symposium Feedback – Highlights:

- Multi-use, flexible over time, adaptable designs. Partnerships providing total community needs. Total utilization must be considered, not just student capacity. Health clinic, social services, community library, seniors drop-in, daycare, public swimming pool, theatre, small private business and fitness centre could be options for use.
- Strategic planning should involve all potential users including private sector and all levels of government and boards. Multi-source funding can then add value even from developers.
- Stretch innovation, gather ideas, consider collaboration of schools such as K–12 and post secondary, trades, education faculty. Pool resources to provide for alternate use during life-cycle. Law, bylaw or zoning changes may be required.

Theme Three
**Functionality
and Utilization**
Session 1

Topic: "Planning for Reusable Schools"

Presenter: Jill Grant is a Professor of Planning at Dalhousie University in Halifax. Her research in community planning focuses on how planners and community residents try to shape environments to meet their values and their changing needs.

Decisional Question:

What role should the school play when addressing the needs of the community?

Context Setting Questions:

Focus on both urban and rural settings. What influences the role of the school in the community? What changes have you seen in the role of the school in the community?

Symposium Feedback – Highlights:

- A school should serve as the centre of the community and accommodate the needs of learners – life long learning.
- A school should allow for flexibility and adaptability to changing needs – evolve with changing demographics and socio-economic factors.
- A school should result from a planning and design process involving all stakeholders.
- A school that is shared with community agencies and government departments should receive shared funding.

Theme Three
**Functionality
and Utilization**
Session 2

Topic: “The Little Red Schoolhouse: Then and Now, What about the Future?”

Presenter: Patricia Semeniuk has been an educator with Edmonton Public Schools for 28 years. She was a School Principal for 18 years and also served as Assistant Superintendent of Consulting Services. She is one of the seven principals who spear-headed the City Centre Education Project to improve the quality of education for students at risk of not completing their schooling.

Decisional Question:

To what extent should the government support provision of integrated services and life-long learning to address the needs of the community?

Context Setting Questions:

Life-long learning can be seen in many different ways. For example, an elderly person walking across the stage to receive a degree, or a process that continues from birth to death.

Integrated Services is the co-ordination and accessibility of government and community services to address the needs of schools and communities.

What is your level of awareness and/or experience with life-long learning? What is your level of awareness and/or experience with integrated services?

Symposium Feedback – Highlights:

- The provincial government should fully endorse integrated services and life-long learning and act as a coordinator, facilitator and promoter to ensure opportunities occur.
- The provincial government should develop policies and regulations that would encourage ministries to integrate services and support life-long learning.
- Shared use of space means shared responsibility and funding.
- New and modernized schools should be planned with integrated services, life-long learning and adaptable use in mind.

Theme Three
Functionality and Utilization
Session 3

Topic: “Functionality and Utilization of Schools – A Private Sector Perspective”

Presenter: Frank Boyd is President & CEO of APEX Corporation, a Calgary-based real estate development company. He is one of the key elements behind the driving success of APEX, which had a record \$320 million in revenue in its first eight years of operation.

Decisional Question:

To what extent should the government encourage alternative functional use of school sites to increase utilization?

Context Setting Questions:

What are the benefits of and concerns for having the private, community and provincial sectors deliver services on school sites?

Symposium Feedback – Highlights:

- The government should encourage alternative functional use of school sites but exercise caution. Alternative uses should only be considered if they support the educational process.
- Alternative use of school sites should be based on community needs and decisions made with community participation.
- Provincial legislation should be reviewed to allow for multi-use of school sites.
- Concern expressed about the amount of reserve land dedicated as school sites which may or may not have a school constructed.

Evaluation Highlights

More than 430 participants representing approximately forty stakeholder groups attended the Minister's Symposium.

Participants submitted approximately 1300 responses to decisional questions placed before them.

Approximately 200 participants completed the Symposium Evaluation Form.

Rating of the Symposium -Usefulness and Interest:

- 78% (156) – very useful and very interesting
- 19% (37) – useful and interesting
- 4% (7) – not useful and not interesting
- **96% rated the Symposium as useful and interesting to very useful and very interesting.**

A total of 163 participants volunteered to sit on subcommittees that may be established to further pursue ideas generated by the Symposium.

Recommendations

The recommendations represent a condensed version of what the participants said at the Symposium

Theme One

Public/private, public/public partnerships are frequently contemplated and sometimes pursued with minimal guidance from Alberta Infrastructure. The Symposium participants said that principles and processes should be clearly outlined and barriers addressed.

Establish a subcommittee to address the following issues:

- Develop guiding principles for public/public and public/private partnerships.
- Develop a P3 template that defines roles, responsibilities and risks of partners.
- Identify and address legislative and financial barriers.
- Implement a pilot project.

Theme Two

Innovative, multi-functional designs, incorporating environmental and economic sustainability and featuring input and funding from all users should be the goal of Alberta Infrastructure.

Establish a subcommittee to address the following issues:

- Develop appropriate processes for obtaining involvement and interest of all potentially interested parties.
- Determine desired outcomes, such as sustainability, multi-functionality, flexibility and look at how and what incentives could be used to obtain them.
- Consider how life-cycle costing can be incorporated by utilizing both capital and operating & maintenance funding.
- Test and develop these approaches by incorporating them in a pilot project.

Theme Three

With hundreds of schools needing to be built and modernized in the coming decade, communities can design schools in ways that can make an enduring difference for generations. These buildings will have a profound impact not just on students but on entire neighborhoods.

The participants at the Symposium said that learning is a lifelong process, design should be flexible and resources are limited.

Establish a subcommittee to address the following issues:

- Establish a process for planning and designing schools that best meet student needs and serve as centres of communities for the 21st century.
- Test the process in a pilot project.

Recommendations (Continued)

Integration of government services to more effectively and efficiently address the needs of children and the community is a stated and commendable goal that requires greater support from the provincial government.

Establish a subcommittee to address the following issues:

- Develop policy/guidelines that encourages government departments to integrate services, where warranted, that support the needs of children, families, life-long learning and integral community agencies/groups.
- Test the process in a pilot project.

Municipalities and school boards, under the Municipal Government Act (MGA), have the authority to obtain reserve dedication for parks and schools at the time a land owner applies to the Subdivision Authority to subdivide a parcel of land. The MGA also allows municipalities and school boards to enter into joint agreements to facilitate the process of establishing reserves to meet their respective needs.

In larger urban centers, there are existing school sites where a school building has not been constructed and may never be constructed. The so-called "surplussing" of school reserve sites has become an issue. In addition, proposed uses of reserve land where a school has been closed has become an issue under the MGA.

Establish a subcommittee to address the following issues:

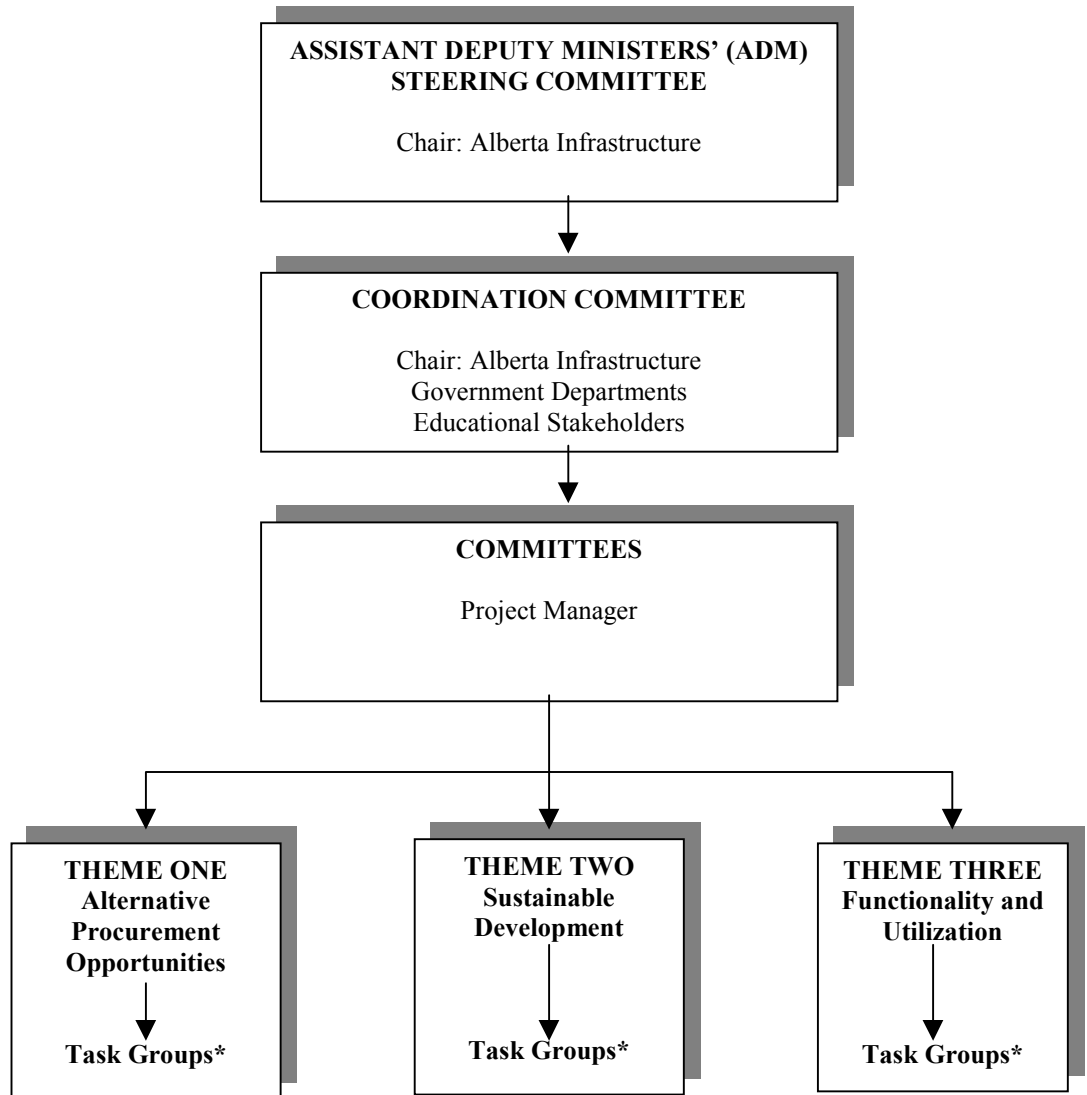
- Examine ways to make the most efficient use of existing school sites.
- Develop options for the provision of schools for communities of the future.

Note: The scope of the review will be limited to the extent of the province's mandate to deal with school and park sites under the MGA.

Next Steps

April, 2002

IMPLEMENTATION PLAN ORGANIZATION CHART



* Each Theme Committee will determine the need for task groups.

ADM Steering Committee: Provides direction and monitors progress of the Post-Symposium Implementation Plan.

Coordination Committee: Reviews progress reports and provides feedback to theme committees. Makes recommendations to the ADM Steering Committee.

Project Manager: Assists in planning, coordinating and managing all work related to the Minister's Symposium on Schools - Implementation Plan.