



Guidelines for Planning School Sites

Table of Contents

Purpose..... 2
Background..... 2
Guiding Principles 4
Recommendations 5

Appendix 1 – Guidelines for the Development of School Sites..... 7
Appendix 2 – Input from School Jurisdictions..... 13
Appendix 3 – Summary of Site Discussion with Municipalities..... 15
Appendix 4 – Site Readiness Checklist..... 21

Guidelines for Planning School Sites

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Purpose

It has become evident that roles and responsibilities related to the provision and support of school sites are not sufficiently clear. Since the availability of a fully serviced school site is a prerequisite for consideration of new school construction, it is important that planning and communication between the provincial government, municipalities and school jurisdictions be improved to ensure that sufficient time and resources are provided to identify and service an appropriate site.

Based on consultations in 2012 and 2013, the proposed Guidelines for the Development of School Sites (Appendix 1) recommends key changes to improve school site selection and servicing and is intended to provide provincial departments, school jurisdictions, municipalities and other stakeholders with guidelines for collaborative planning and development of school sites. The guidelines include information from Alberta Education and Alberta Infrastructure regarding requirements to support requests for new school construction.

Background

In the past, the availability and suitability of school sites for future school construction have varied considerably. Municipalities and school jurisdictions indicated that a provincial commitment to a long-term (three to five years), predictable capital plan and enhanced communication could enhance local planning of school sites. Collaboration between the municipalities and school jurisdictions has been another challenge. While municipalities and school jurisdictions have sometimes collaborated in securing future school sites and creating mechanisms to enhance joint planning, in other cases, their respective independent actions have created challenges in attaining a quality site with appropriate servicing. Due to a lack of information, co-ordination and local funding for services, the following issues have occurred with a potential school site:

- site contamination has not been identified and/or addressed;
- challenging topography (e.g., slopes, swamps) and/or sites that do not meet school site requirements;
- insufficient funding to provide services (e.g., water, sewer, gas);
- inadequate property size for the population served; and
- inadequate access.

These issues have led to project delays, unanticipated construction and maintenance costs, project cancellations, or a decision to move the school to a different community.

In August 2012, Alberta Education's Capital Planning Sector introduced a project to review concerns from a school jurisdiction and municipal perspective and examine successful practices that may be applied across the province. A committee was established with representation from Alberta Education, Alberta Infrastructure, Alberta Municipal Affairs, Alberta Urban Municipalities Association (AUMA), Alberta Association of Municipal Districts and Counties (AAMDC), Alberta School Boards Association (ASBA) and the Association of School Business Officials of Alberta (ASBOA).

The purpose of the committee was to explore challenges related to school sites and to identify potential solutions, including the creation of guidelines, tools and best practices. As part of this project, the committee also reviewed existing joint use/planning agreements in various communities. While the original direction was to exclude issues relating to the *Municipal Government Act* (MGA), it has become clear that the province's current review of the MGA provides an opportunity to amend the Act and align it with the *School Act*.

Input from School Jurisdictions

Concerns raised by school board administrators during the annual capital planning workshop in January 2012 prompted an examination of the challenges being encountered in obtaining timely access to appropriate sites for school construction. The input revealed that the process for obtaining land for new school construction varies significantly across the province and there are no standards in place outlining the size and quality of sites for new schools or for site services.

It was also noted that collaboration between the province, municipalities and school boards is inconsistent. In many cases, school jurisdiction boundaries encompass a number of municipalities, each of which has differing requirements and interpretations of their municipal responsibilities related to school sites. The working relationships between school jurisdictions and municipalities varies from extremely positive to non-existent. A summary of the input received at the January 2012 session is attached as Appendix 2.

Input from Municipalities

An important part of this work was to gather input from municipal administrators. With the support of AUMA and AAMDC, regional working sessions were held in Lethbridge, Airdrie and Leduc in May 2013. Background information about the nature of the challenges faced in planning for school sites was shared and clarified.

The input gathered from municipalities reiterated many of the comments heard from school jurisdictions. In particular, municipalities expressed concern over the lack of clarity regarding responsibilities and legal obligations of each party as they relate to

provision of school sites (e.g., obtaining planning approvals, meeting development permit conditions, fees for permits and development charges, provision of site services, etc.)

Additional comments emphasized the need for consistent and predictable capital approvals from the Government of Alberta to ensure that local budgeting and planning activities could more closely align with project announcements. Municipalities were concerned that changing site requirements (e.g., school sizes, grade configurations) resulted in existing sites being inadequate, particularly in high-growth communities. As well, municipalities expressed concern that standards for public, Catholic and Francophone schools appear to vary.

On June 13, 2014, the AUMA provided a submission to the *Municipal Government Act* review. This document, *Building Thriving Communities: AUMA's Submission to the MGA Review Process*, provides further comment on the AUMA's perspective regarding how municipalities and government should work collaboratively in order to benefit communities. The document can be found at www.auma.ca.

A summary of responses received during the May 2013 sessions is attached as Appendix 3.

Guiding Principles

In developing solutions to these challenges, the working group developed and agreed upon the following principles:

1. Schools are community assets.
2. Provincial, municipal and school authorities must collaborate in an integrated planning process, with a commitment to trust, transparency and ongoing information sharing for the benefit of the broader community.
3. Integrated school planning and partnerships maximize the benefits to the broader community.
4. The roles and responsibilities of the provincial government, municipalities and school authorities regarding school sites must be clearly defined.
5. Mutually agreed upon guidelines for the selection and development of school sites should be established locally.
6. Adequate resources must be available to adequately plan and undertake the servicing of sites.

It is important that funding provided by Alberta Education is focused on the construction of school buildings. It is Alberta Education's and Alberta Infrastructure's expectation that a school jurisdiction will engage with the municipalities included within its boundaries in the planning and development of school sites. The majority of issues that have arisen in the acquisition and development of school sites are related to one or more of the involved partners' exclusion from the process. Lack of communication between all parties has led to delays, increased costs and sites that do not meet needs for the school or the community. It is also recognized that the lack of predictability of provincial capital funding can be a barrier to effective planning and co-ordination at the local level.

Conversely, when there is a strong culture and history of collaboration between the province, municipalities and school authorities, the results have been very positive. The co-ordination of provincial, municipal and school authority planning is a key part for creating positive outcomes. Examples of ideal school locations, optimum sites and facilities enhanced through partnership can be found throughout the province. This has led to overall improvement of school programs, as well as opportunities for the community to gain access to facilities.

There are a number of issues that are directly or indirectly related to school sites such as the current review of the *Municipal Government Act*, the allocation of school reserves, the provision of offsite levies, the alignment of the *Municipal Government Act* and the *School Act*, and Municipal Sustainability Initiative funding. While these have an impact on school sites, they are excluded from the scope of this review.

Recommendations

1. Enable long-term and integrated planning of school sites between provincial departments, municipalities and school authorities.
 - School jurisdictions and municipalities will work collaboratively in the development of their respective plans that affect the need for school sites (i.e., school boards provide input in the development of area structure plans and municipalities provide input in the development of the school jurisdiction's capital plans, which provides early notice of a potential school in the municipality's community).
 - The Government of Alberta commits to a predictable funding model for school capital projects (three to five years).
 - The site readiness checklist (Appendix 3) will be completed in consultation with the municipality.

2. Provide guidelines to clarify roles and responsibilities and outline best practices in school site selection and site development.
 - The Guideline for the Development of School Sites (Appendix 1) was developed using a combination of best practices and existing guidelines and is intended to provide stakeholders with a consolidated guideline relating to site development. It is expected that each school jurisdiction will review and observe the requirements as part of its work toward the development of an annual capital plan submission.
3. School jurisdictions and municipalities should review existing joint use and planning agreements and work toward creating agreements where they do not currently exist.
4. This report will be forwarded to the committee that is reviewing and providing recommendations for changes to the MGA and will act as a resource when reviewing provincial legislation, policies and grant programs to address potential barriers (e.g., MGA's current allocation for school reserves and provision for offsite levies, harmonization of Education Act regulations).

Appendix 1 – Guidelines for the Development of School Sites

Roles and Responsibilities

Government of Alberta

- The *School Act* (and upcoming Education Act) and regulations set out the legislative requirements in relation to school facilities.
- The Government of Alberta establishes policies and procedures governing capital projects undertaken by boards.
- School jurisdictions may receive funding for capital projects approved by Alberta Education for new schools, additions and replacement schools, for modernization of existing school facilities and for the construction, transportation and setup of modular classrooms and re-location of portable classrooms.

Municipality

- Section 670(1) of *Municipal Government Act* assigns the responsibility and authority to the municipality as the subdivision authority to specify the amount, type and location of reserve land that is to be provided.
- Subsection (a) and (b) further clarify that school reserve land is to be provided:
 - a) in accordance with an agreement made between the municipality and the school boards, or
 - b) in the absence of an agreement, in accordance with the needs of each of them as those needs are determined by the subdivision authority.
- The provision of serviced school sites and the development of playing fields should reflect agreement between municipal and school authorities.

School Jurisdictions

- Engage in the analysis of demand for schools and the identification of schools for future communities.
- Submit a three-year capital plan to Alberta Education. The capital plan identifies needed capital projects in an order of priority.
- Undertake discussion with municipalities in support of requests for a new or a replacement school to ensure the site has been identified and services are available to construct the school.

- Adhere to Alberta Infrastructure and Alberta Education requirements when planning, developing and implementing school capital projects. Additionally, school jurisdictions must comply with all federal, provincial and municipal laws and building codes for all projects they undertake.
- Plan and implement grant funded capital projects within provincial parameters (e.g., budget, standards).
- Maintain and operate schools.

Site Investigation and Selection

Attention should be given to Alberta Infrastructure’s building Guidelines and Standards for Supported Infrastructure, available at www.infrastructure.alberta.ca/738.htm.

The following investigations should be undertaken by the school jurisdictions in consultation with local municipalities as a prerequisite for submission of first year new or replacement capital projects.

- Site size – Determine the required site size for a school based on the projected enrolment, expected grade configuration, building size and other community uses.
- Land status – Obtain information from the municipality on the zoning, right-of-ways and easements related to the proposed property and any other information relevant to site development.
- Utility servicing to the site and capacities – Co-ordinate with the municipality and/or utility companies to confirm location, type and size of water, sanitary, storm, gas, telephone, Supernet, and power services adjacent to the site. Provide details and show location of these services on a site plan. Highlight any potential servicing limitations.
- Transportation – Provide local area transportation details/studies that include but may not be limited to the following:
 - Existing or planned future access road details to the site.
 - Potential access issues, especially with respect to a school building including:
 - public transportation;
 - traffic and capacity issues;
 - parking requirements and

- suggestions, recommendations, resolution strategies.
- Environmental Site Assessment (ESA) – Provide a phase 1 ESA¹ to identify whether a phase II assessment is required.
- Geotechnical study – Provide and review existing subsurface data, soil bearing capacity, depth of water table, and report on type of soil. Drill a minimum of six boreholes to a minimum depth of 10 metres per site.
- Floodplain study – Investigate through the municipality to determine flood level for the site, as well as 1:500 year floodplain elevation. Identify any flood risk assessments that have been completed.
- Topography – Complete and provide a topographical survey based on a five-metre grid of the building envelope area, potential parking areas and access roads.
- Archeological sensitivity assessment – Alberta Culture’s Historic Resource Management Branch is available to assist in providing assessments of a site’s historical or archeological sensitivity by calling 780-431-2374 or by dialing toll-free 310-0000.
- Identify any high tension power lines, high vapour pressure and large diameter high pressure hydrocarbon pipelines within 500 metres of the site.
- Attach digital photographs of proposed site.
- Identify any significant feature on or off the site that could affect school construction and/or operation.

Joint Planning Process

Joint Use Agreements provide an enhanced benefit to both the school and the community and could lead to the development of a collaborative relationship between school jurisdictions and municipalities. These agreements clarify expectations, help set goals for the community, eliminate uncertainties and reduce disputes.

¹ As per CSA’s Z768-01 Phase 1 Environmental Site Assessment standard.

Joint Use Agreement should include:

- process for acquiring land for future schools (e.g., building envelope, playing fields) and standards for school sites that applies to different student ages and capacities of buildings. consideration should also be given for the provision of other community services compatible with school operation;
- responsibilities for site development (e.g., playing fields) and maintenance;
- access agreements for facilities and playfields operated by municipal and school authorities (e.g., school gymnasium, swimming pools, tennis courts);
- collaboration mechanisms (e.g., joint use coordinating committee); and
- an understanding regarding disposition and/or future ownership of surplus school land.

Collaborative Process

- School jurisdictions should be involved in the development of area structure plans. They should be engaged in the analysis of demand for schools and the identification of sites for future facilities.
- The development of school jurisdiction capital plan submissions should be undertaken in consultation with affected municipalities. The three-year capital plan submission should be shared with the municipalities.
- The exchange and update of information should be provided through regular meetings and communications between the municipality and school jurisdictions.

Partnerships

The Government of Alberta recognizes the benefits inherent in community partnerships and encourages school jurisdictions to actively pursue partnership opportunities (such as joint libraries, community recreation centres or other community service providers).

In order to ensure new capital projects proceed in an integrated and timely manner, school jurisdictions should:

- provide separate mechanical and metring systems for partner space where feasible;
- determine and agree upon the capital and maintenance cost of partner space;
- transfer ownership of dedicated partner space to the partner at project completion, if applicable.

The partner wishing to contribute capital to a school project should:

- work collaboratively with the Government of Alberta and the school jurisdiction to determine the partners space requirements;
- work within established project timelines;
- own, operate and maintain the partner space if it is constructed as dedicated partner space; and
- acknowledge that ownership of partner-funded enhanced school space rests with the school jurisdiction, subject to a joint use and operation agreement.

Together, the school jurisdiction and the partner should:

- secure the required land ownership interests to ensure that the school and partner space can be constructed by government in a timely way and according to project timelines;
- enter into a formal memorandum of understanding, tri-party or other agreement regarding the construction of the school project;
- enter into a formal funding agreement with the Government of Alberta regarding the provision of funding by the school jurisdiction and/or joint partner to the project; and
- enter into a joint use and operating agreement for shared use of partner and school space or amend an existing agreement. Other considerations for such agreements should include:
 - shared access to space or other amenities such as playgrounds;
 - keys and lock down procedures;
 - designated parking;
 - insurance;
 - limitations on access to space during holidays and non-operating school days;
 - shared custodial services;
 - security monitoring and systems;
 - snow and refuse removal;
 - scheduled liaison meetings; and

- dispute resolution process.

Appendix 2 – Input from School Jurisdictions

Summary of Site Discussion

Process for obtaining land for new school construction

The process for obtaining land for new school construction appears to vary across the province with examples of structured and unstructured approaches.

Structured processes include: (i) assembly of up to 10 per cent dedication for Municipal and School Reserve as part of the subdivision process; (ii) collection of cash in lieu of land designated for Municipal and School Reserve for subsequent land purchase; (iii) development of joint use agreements / tri-party agreements allocating reserve land between municipal and educational uses.

Unstructured processes include: (i) school boards negotiating with municipalities as sites are required for a new school project; (ii) school boards purchasing land directly from private landowners as required; (iii) school boards leasing land owned by municipalities as required.

The process for obtaining land appears to be highly interactive between school boards and municipalities with school boards identifying needs in terms of site location, size and availability and municipalities striving to meet these needs.

Standards regarding the size and quality of sites for new schools

- There are no provincial standards in place outlining the size and quality of sites for new schools. Each school board follows its own site guidelines for evaluating sites being offered.
- There are instances where school boards and municipalities have developed joint site guidelines to manage site specification, which are in some cases contained within formal agreements.

Challenges faced obtaining sites / provided sites

- Sites provided are typically inappropriate in terms of size, location, topography (not graded), or do not have the required site services (e.g., power, water, drainage).
- Sites provided only have one street frontage in many cases; however good site planning separates bus drop off from parent drop off, is safer with dual frontage sites.

- Area Structure Plans are developed largely independent from school boards, typically resulting in poor school sites; early communication should improve outcomes.
- Locating municipal and school services together is sometimes challenging because of timing of funding approval resulting in reduced access and opportunities for students.
- There is lack of legislation defining the role of municipalities in the provision of school sites or regulations setting the standards for sites, including the provision of site services.
- There is lack of control or oversight in the management of cash in lieu funds used for the purchase of school sites.
- There is no certainty in terms of when capital funds will be available, making it difficult to secure sites in a timely manner.
- Local improvements, such as upgrading water and sewer systems, in some instances, are being levied on school boards.
- School boards compete for the same school sites.

Suggestions for improvement

- Revise the *Municipal Government Act* to clearly define the role of municipalities in providing school sites.
- Develop provincial guidelines that require municipalities to establish school site standards.
- Require early investigation into the appropriateness of new school sites (e.g., geotechnical assessment, level 1 environmental testing, access to the site).
- More certainty in terms of timing of capital approvals.

Appendix 3 – Summary of Site Discussion with Municipalities

Lethbridge – May 22nd, 2013

Summary of Discussion

- The 10 per cent reserve dedication is unique to Alberta. In many provinces, government has to purchase land for schools.
- The biggest challenge in co-ordinating joint use activities is the uncertainty in timing of provincial approvals.
- Trust between school jurisdiction and municipality is the most important in achieving joint planning.
- A change in priorities from year-to-year by the school jurisdiction can create uncertainty.
- Examples of joint use agreement terms:
 - regular meetings occur to discuss priorities;
 - a joint use agreement that clarifies the use of facilities (e.g., gym, pool) as well as responsibility for development and maintenance of playing fields; and
 - priorities over the use of gym space (e.g., school and community access).
- Ten per cent reserve dedication is insufficient for high school sites.
- Site readiness checklist is completed jointly with the city.
- Public-Private Partnership (P3) projects have caused uneasiness among some boards. It is unclear how a third-party maintenance company will comply with the joint use agreement and obligations for the use of the space.
- There are challenges with the availability of surplus sites and existing sites that are too small for larger schools being built (Kindergarten to Grade 9 with capacity for 900 students instead of the original plan for Kindergarten to Grade 6 for 600 students).
- Municipal work with the school board does not include joint planning activities and the municipality is not aware of future capital projects being proposed by the school board.
- Need more synchronized work among parks, planning, school boards and developers.

- Cash in lieu account that city holds goes to park development.
- City acts as developer for most neighbourhoods.
- Fourty per cent of students come from out of town, yet the town is responsible for site planning.

Suggestions for Future

- Introduce a formal working relationship that includes an agreement and joint planning forums.
- Enhance student enrolment projections.
- Involve post-secondary education in high school design.
- Size standards should be determined locally; these decisions are based on how each community uses the site and the needs of the community.
- The future potential need for portables/modulars in a community should be defined within the local context.
- Recommend a workshop on local government which promotes excellence and innovations transformgov.org/en/home.
- Charge user fees for joint use and use the fund to deal with maintenance items, surpluses.
- Determine what impact the emphasis on partnerships will have on the size of required land.
- The municipality should sign off on site readiness checklist.
- School boards should review area structure plans and provide input on need for schools.
- Continue to provide flexibility for municipalities in planning for school sites.
- Availability of funds to service the site and develop playing fields needs to be addressed at the local level.

Airdrie – May 23rd, 2013

Summary of Discussion

- The designation of a school site for Francophone school in Cochrane was challenging.
- The site was originally designated for a public school.
- Residents who were accustomed to having a park did not support a school on this site.
- It was suggested that the building did not fit this site.
- The timelines under this P3 project did not allow outstanding development permit issues to be resolved, in a timely manner.
- The school boards and the municipality disagreed on the number of required schools.
- The municipality has design guidelines, which suggest how the exterior of a building could fit architecturally within the community.
- Timelines for meeting expectations required by municipalities are very tight once government provides funding for a project.
- Site servicing requirements are not communicated well to the municipality and expectations are unclear.
- Planning issues should be resolved in advance of applying for development permits.
- The trend toward building larger schools affects the size of required reserve land (i.e., footprint of the larger school needs to fit a smaller building envelope).
- It is important to share information of the location of the school building with the developer to ensure that services are placed appropriately.
- School board negotiates land privately with developer, cutting the municipality out of the conversations. This also creates varying points of contact.
- Prior knowledge of future capital plans need to be communicated to the municipality.
- Province is not clear on its expectations of the municipalities.
- School board does not fulfil conditions of development permits.

- Municipal reserve land is not always designed for public, Catholic or Francophone schools and there is no commitment to the future use of the site.
- A school site is required far in advance of a project being approved. Timelines make it difficult to place a potential school on site. The building should be designed to fit the site.
- Feels that expectation of the province are firm and fair.
- Long range master plans should include bus drop off and circulation plans to ensure traffic safety.
- In some cases, Transportation and Environment should be included in the discussions.
- The expectation of providing school sites creates difficulties in allowing for sufficient open space within the community.
- The town has a very young population and has struggled to provide the required sites.
- Regional school boards serve acreage developments located in the surrounding counties, which puts further pressure on the town to deliver sites.
- Population growth in the community has exceeded long range student accommodation plans resulting in a shortage of sites.
- Fewer schools with higher capacities result in surplus school sites.
- High school sites cannot be provided within the 10 per cent reserve dedication.
- Changing capital and program requirements of school boards and additional school boards (e.g., Francophone) adds to the unknowns in planning.

Suggestions for Future

- Collaboration, a financial incentive or increased priority for joint projects will lead to greater desire to explore partnerships.
- Partners need to be at the table regularly to share concerns.
- Emphasis on joint sites will create community focus.
- A communication plan between school board and municipality should be developed.
- As much up front planning as possible. It would ensure a faster process.

- Offsite levies and cash in lieu accounts need to be explored as it relates to the catchment area of the school.

Leduc - May 30, 2013

Summary of Discussion

- Expectation of tight timelines forces municipality and school board to look at less than ideal sites.
- Footprint of schools are getting larger which changes the number and size of sites required.
- Parental behaviour and drop-off safety is a major concern; circulation around sites needs to be looked at.
- Province does not have a predictable capital plan which puts pressure on communities to set budgets years in advance.
- City has decided not to proceed with servicing land until a school is approved. This is a result of having many serviced sites that will not be used.
- The use of higher story building as well as stackable modular classrooms would help to alleviate site size issues.
- Municipality was not aware of the requirement for the city to develop playfield areas. Clarity of responsibilities and expectations is not available.
- Adequate time to develop partnerships is not given post-approval. Development of partnerships prior to the project being approved is difficult with no guarantees of timelines or funding commitments.
- A three-year capital planning approval cycle would allow for greater planning results and collaboration.
- Municipality has typically been involved too late in the process. It holds meetings twice a year with school boards, but does not have an official joint use agreement.
- The province needs to provide direction as to its expectations for municipalities and school boards in the joint development of projects.
- Older sites are hard to build on due to community expectation that it remains park space.

- The increased size of new schools require larger sites. Existing sites planned for in the past are strained.
- School boards need to commit to a site when they identify it as being needed for a school, and be responsible for planning for the number of school spaces that will be required to accommodate future expected growth.
- Joint planning agreement exists, co-ordination of planning has occurred with past projects.

Suggestions for Future

- Clarity of expectations and sufficient time to collaborate will lead to better results.
- Municipalities feel that government forces them to agree to terms, such as site development costs and timelines, by threatening projects.
- Three-year funding cycle would lead to better collaboration efforts.

Appendix 4 – Site Readiness Checklist

For more information visit:

education.alberta.ca/school-infrastructure/planning-school-projects/

SITE READINESS CHECKLIST

NOTE: A copy of this form must be completed and submitted with your Three Year Capital Plan for each New or Replacement School project requested within the first year of that plan

School Authority

Name of Project

Location

1. Does the Board have legal title or interest in the land to be used for the building envelope? YES NO

Yes ⇒ Provide the legal description of the property.

No ⇒ Provide an explanation.

2. Does the current zoning enable the construction of a school? YES NO

NO ⇒ If rezoning is required please provide details on requirements and potential cost considerations.

3. Are services such as power / water / sanitary / storm / gas available to the property line? YES NO

NO ⇒ Provide an estimate of the time required to provide the required services.

4. Is the site topography suitable for the project? YES NO

NO ⇒ Provide details of site challenges.

5. Do geotechnical or foundation concerns exist? YES NO

YES ⇒ Provide details of concerns.

6. Has a Phase 1 Environmental Site Assessment been completed? YES NO

YES ⇒ Were any issues identified? YES NO

YES ⇒ Provide details of issues identified.

SITE READINESS CHECKLIST

7. Are further environmental assessments warranted? YES NO

YES ⇒ Provide an explanation.

8. Is the site outside 1:500 year floodplain? YES NO

NO ⇒ Provide details.

9. Is adequate road access available for construction? YES NO

NO ⇒ Provide details.

10. Are there any other issues, concerns or remediation required to make the site ready for construction to begin? YES NO

YES ⇒ Provide an explanation.

I confirm that the above information is accurate.

Signature

Print Name

Title

Date

Contact person if different than above:

() -

Print Name

Phone Number

EDFM0013