

# SCHOOL CAPITAL MANUAL

March 2015

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# 1. Introduction

## 1.1 Inspiring Education

The world is changing. Work is changing. Jobs are being crafted around technology that didn't even exist five years ago. Today's students require a well-rounded education to prepare them for the future.

We're helping our students to understand new learning tools, inspiring them to become ethical citizens and engaged thinkers with an entrepreneurial spirit. The world is changing. And our approach to education needs to change with it.

The vision of Inspiring Education asks teachers, school leaders, parents and community leaders to think about educated Albertans of 2030. What will define their success? What will they need from their education system to achieve it?

As planners of school facilities for Alberta's growing student population amidst ever-changing technological advancements, you have the challenging responsibility of creating and maintaining the educational spaces where students will explore ideas, exchange information and identify new ways of working and living in the 21st century and beyond.

The updated School Capital Manual is a guide for school jurisdictions in creating your plans to build or improve the facilities that will help shape the educational experience of students today and in the future. Its purpose is to provide you with a clear understanding of your role and responsibilities in the planning of school construction projects, in maintaining or improving the condition of school facilities and in optimizing the use of a facility.

## 1.2 Legal and Policy Framework

School capital planning and implementation is based on a legal and policy framework that supports the accountability of all parties. Some of the key aspects of this framework are highlighted below:

*Acts – School Act, Municipal Government Act*

*Regulations – School Buildings and Tendering Regulations, Disposition of Property Regulation, Capital Borrowing Regulation, Designation and Transfer of Responsibility Regulation*

*Other documents and agreements – School Capital Manual, New West Partnership Trade Agreement, Funding Manual for School Authorities, Education Design Standards, Memorandum of Understanding between Education and Infrastructure.*

Alberta Infrastructure (Infrastructure) and Alberta Education (Education) are responsible for legislation and policy applicable to Kindergarten to Grade 12 school building projects and maintenance programs. School jurisdictions must adhere to Infrastructure and 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.

### 1.3 Who to Contact

#### Education

<p>Capital Planning Sector helps with:</p> <ul style="list-style-type: none"> <li>- capital planning</li> <li>- capital funding requests</li> <li>- approved capital projects and budgets</li> <li>- project design</li> <li>- projects funded through Infrastructure Maintenance and Renewal (IMR)</li> <li>- development of capital plans</li> </ul>	<p>Contacts:</p> <p>Executive Director, Capital Planning 780-643-0951</p> <p>Director, Capital Planning, North 780-427-2083</p> <p>Director, Capital Planning, South 780-427-2272</p>
<p>Strategic Financial Services Sector helps with:</p> <ul style="list-style-type: none"> <li>- Plant Operations and Maintenance (PO&amp;M) Funding program</li> <li>- Payments to school authorities on all school capital funding</li> </ul>	<p>Contacts:</p> <p>Director, School Finance 780-422-0865</p>
<p>Collaboration and Learning Supports Sector helps with:</p> <ul style="list-style-type: none"> <li>- provincial program standards and program implementation services</li> </ul>	<p>Contacts:</p> <p>Director, First Nations, Metis and Inuit (FNMI) Education Division, Collaboration and Learning Supports Branch</p>
<p>Field Services Sector helps with:</p> <ul style="list-style-type: none"> <li>- provincial program standards and program implementation services</li> </ul>	<p>Contacts:</p> <p>Executive Director, Field Services Sector 780-427-0929</p>

#### Infrastructure

<p>Learning Facilities Branch helps with:</p> <ul style="list-style-type: none"> <li>- implementation of approved capital projects</li> <li>- project management support</li> <li>- project design</li> <li>- tendering</li> <li>- cost analysis</li> <li>- review of IMR expenditures</li> <li>- technical support</li> </ul>	<p>Contacts:</p> <p>Executive Director, Learning Facilities 780-643-1080</p> <p>Director, Learning Facilities, North 780-422-7529</p> <p>Director, Learning Facilities, South 403-592-2667</p>
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## 2. School Capital Plans

### 2.1 Ten-Year Facilities Plan

The Ten-Year Facilities Plan provides a broad overview of the school jurisdiction's facilities. It helps each school jurisdiction, Education and Infrastructure identify long-range facility needs to support the school jurisdiction's education and technology plans.

School jurisdictions must develop their Ten-Year Facilities Plan and must submit to Education upon Capital Planning's request. School jurisdictions may also be asked to submit additional information or a business case in support of a project. A school jurisdiction should review its plan annually to confirm that it is up to date and relevant.

The plan should include the following information:

- Enrolment pressures and emerging learning opportunities that need to be addressed through expansion (i.e., new schools, additions and modular classrooms). The plan must indicate the jurisdiction's expected utilization rates for the ten-year period. This should include enrolment projections for areas of growth and for areas with declining enrolments.
- Modernization needs for schools for the ten-year period.
- 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.
- Declining enrolments that may lead to closure of programs or school buildings.
- The need for capital funding to modernize or add space to the school(s) where students are being relocated.

### 2.2 Three-Year Capital Plan

Each year school boards must assess their school capital needs and prioritize proposed projects based on safety of existing school facilities, enrolment pressures, modernization needs, etc. These projects are identified in their Three-Year Capital Plan and Ten-Year Facilities Plan. The Three-Year Capital Plan must be approved by the Board of Trustees or Charter School Authority and signed off on an annual basis and then submitted to Education for consideration of funding.

The projects requested in these plans - new and replacement schools, modernizations and additions - are examined and the Government of Alberta determines the most pressing needs as identified by the school boards. Education prioritizes these project requests by first considering school board priorities and then other criteria. See section 4.1 of the manual for details on the criteria. High-priority projects from the provincial school capital plan are considered and approved when funds become available. Education's needs are looked at in the context of the infrastructure needs of other government ministries.

The fiscal year for capital plans is April 1 to March 31. The Three-Year Capital Plan must be submitted by April 1 of the year prior to the commencing year of the plan. For example, the plan submitted on April 1, 2014 is for the years 2015 to 2018.

The Three-Year Capital Plan must:

- identify the highest priority school facility/infrastructure needs for the three-year period;



- be updated by the school jurisdiction and submitted on an annual basis;
- include, at a minimum, the detailed breakdown of costs by facility required to complete the web-based New School Project Application and the Expansion and Modernization Project Application (Infrastructure’s Forms 1 and 2 available on the Web Application Program [WAP]);
- demonstrate that the school jurisdiction has evaluated its ability to deliver the requested projects during the three-year period; and
- include a completed copy of the Site Readiness Checklist (Form 8) for new or replacement school projects that are included in the first year of the jurisdiction’s three year capital request.

Should a site be deemed not ready after approval of a project, any and all costs to rectify the situation shall be borne by the jurisdiction. If the site is deemed not viable the approval may be withdrawn.

### 3. Creating Your Three-Year Capital Plan

The following steps will assist you in preparing your Three-Year Capital Plan.

#### 3.1 Consider Accommodation Options

##### **Approaches for Delivering Education Programs**

School jurisdictions should consider possible alternatives and approaches for delivering education programs and accommodating students. Examples include but are not limited to:

- making more efficient use of existing space available in other schools or other facilities in the community, in other communities in the region, or in other school jurisdictions;
- adjusting grade structures within the school(s);
- operating schools for longer periods each day;
- offering year-round schooling; and
- enhancing technology in schools (e.g. videoconferencing) to provide for additional opportunities for students to access education programs.

In preparing three-year capital plans, school jurisdictions may consider the following options to help address accommodation needs:

- new schools and major additions
- modernizations and replacement schools.

Requests for modular classrooms and leasing are submitted through a different process (see section 10).

##### **3.1.1 Expansion Program**

This funding program supports construction of new school buildings or major additions to existing school buildings to accommodate growth in enrolment and new program requirements.

Current enrolments and enrolment projection information must be provided to Education with the request for new space.

As indicated in section 203 of the *School Act*, before any construction or demolition begins, school jurisdictions must submit a copy of the expansion plans related to construction, addition, or reducing the number of classrooms in the original design of a school.

Jurisdictions must seek approval for additional space for capital projects from the Minister of Education.

All new schools must meet government requirements for LEED Silver certification, which is a measure of sustainability and energy efficiency.

### **Criteria for adding to an existing school**

A school jurisdiction may choose to include a major addition to an existing school as a priority in their Three-Year Capital Plan when:

- The school experiences increases in existing enrolments with utilization rates nearing or exceeding 100 per cent.
- The school requires additional space for programming (e.g., CTS labs).

### **Criteria for building a new school**

A school jurisdiction may choose to include a new school as a priority in their Three-Year Capital Plan when:

- Additions to existing schools would not provide sufficient space to accommodate current and expected future enrolment in the sector.
- Existing schools are not appropriately located in the geographic sector of the jurisdiction to accommodate current and expected future enrolment.
- The utilization rate for any geographic sector of the jurisdiction is above 100 per cent.

A utilization rate of 100 per cent or greater indicates that a school is approaching a point where consideration should be given to providing additional space. This depends on enrolment trends, utilization rates across the jurisdiction or sector, and current capital projects underway.

## **3.1.2 Modernization Program**

Modernization funding supports the renovation of a school building or portion of a school building to address aging of the physical structure and/or improve the functionality and suitability for present and future educational programs. Modernization projects are assessed based on the following criteria:

- health and safety
- current and projected enrolments
- utilization rate
- strategic location
- cost savings by right sizing
- functionality
- condition as determined by a facility audit.

A modernization project involves renovations to all or part of an existing school in order to:

- overcome major deficiencies throughout a building or a section of a building that threaten the health and safety of students and staff
- accommodate educational programs and integrate delivery of technology, including Career and Technology Studies (CTS) equipment, associated with the modernization project
- provide access and facilities for persons with disabilities
- replace or upgrade building structural components, mechanical and electrical services, and architectural finishes.

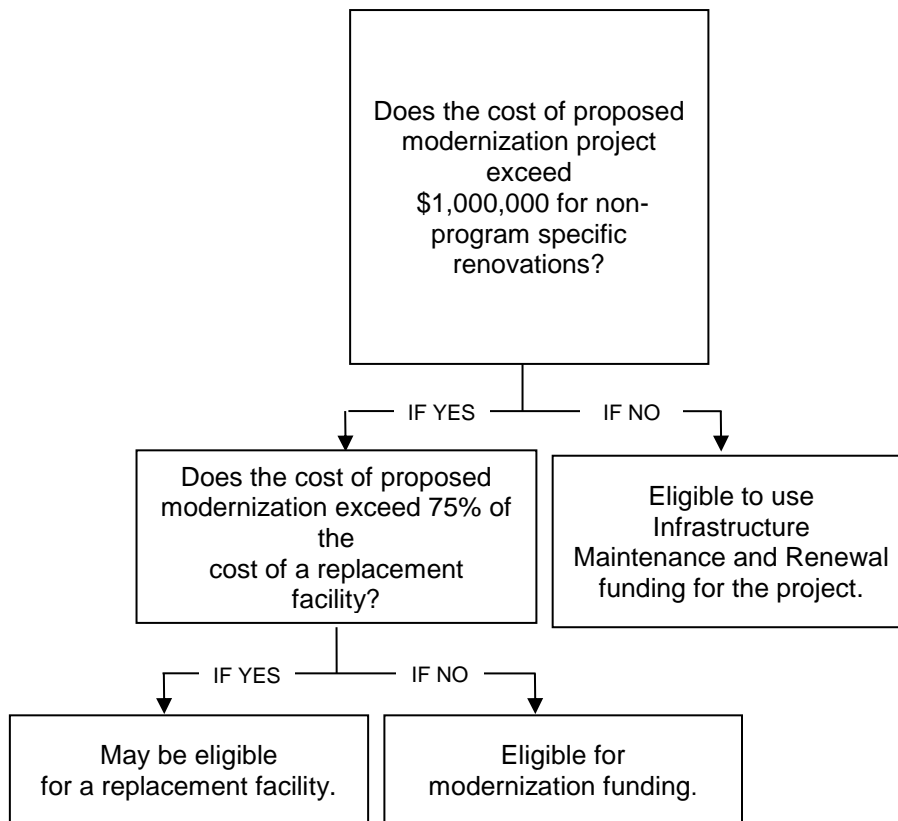
Modernization funding is provided for projects where the total construction cost for non-program specific renovations exceeds \$1,000,000. For any projects under the above-noted cost thresholds, school jurisdictions should use Infrastructure Maintenance and Renewal funding (see section 12).

Where a modernization project is estimated to cost more than 75 per cent of a replacement facility, the school jurisdiction may instead wish to list a replacement facility as a priority in their Three-Year Capital Plan.

Jurisdictions are also required to report to Infrastructure when they have reduced space in a school due to a modernization.

**Identifying Modernization Funding Opportunities**

The chart below illustrates the process school jurisdictions should follow to identify potential modernization projects. School jurisdictions inform Education of their modernization plans through their Three-Year Capital Plans.



### 3.2 Prepare the School Site

Discussions with municipalities must occur prior to submitting a request for all high priority new or replacement projects to ensure the site has been identified and services are available.

A Site Readiness Checklist (see Appendix K - Form 8) available at <http://www.education.alberta.ca/media/6414507/form8sitereadiness.doc> must be completed, signed and submitted for each New or Replacement School Project included in the first year of the jurisdiction's Three Year Capital Plan.

Areas that need to be considered include:

- title of land
- appropriate zoning
- topography of site
- any site assessments that have been completed
- adequate road access
- site size considerations
- services to the site
- other concerns about the site.

### 3.3 Identify Possible Partnerships

The ministers of Education and Infrastructure believe that schools serve as important hubs within communities. School boards are expected to identify potential partnerships with local jurisdictions that would mutually benefit both the students and larger community.

To assist school jurisdictions in identifying and establishing partnership opportunities, please refer to the Partnerships webpage online at <http://education.alberta.ca/departement/ipr/capitalplanning/infrastructureresources.aspx> for the Guide to Partnerships and various resources.

School jurisdictions are encouraged to contact their Education Senior Manager in Capital Planning for any additional information on developing partnerships.

#### 3.3.1 Student Health Services and Parent Link Centres

For information on Student Health accommodations and Parent Link Centre facilities in schools, please contact Education's Capital Planning Sector at 780-643-0951 (toll free by first dialing 310-0000).

### 3.4 Develop a Budget

This information is to assist you in preparing individual capital project applications. For more assistance and support in developing your budget, contact the Learning Facilities Branch at Infrastructure.

#### 3.4.1 Building Construction Support Prices

The building construction support rates are outlined in the cost templates provided to each school jurisdiction. The SharePoint site link to access this information is <https://extranet.infrastructure.alberta.ca/capitalprojects/pm/cm/ecs/CPMP/Schools/Forms/AllItems.aspx>. Infrastructure will update the cost templates as required in response to fluctuations in

market conditions and construction escalation. For any questions on these templates, please contact the Learning Facilities Branch at Infrastructure.

### 3.4.2 Location Differentials and Distance Allowances

Location factors are applied to the support rate per square metre to compensate for the higher costs associated with construction in various locations and are now included in the cost templates. For any questions on location differentials and distance allowances, please contact the Learning Facilities Branch at Infrastructure.

### 3.4.3 Budget Components

The project budget established for each capital project typically includes the following capital cost components:

- Building Construction Costs
- Consultants' Fees
- Project Expenses
- Furniture and Equipment
- Career and Technology Studies (CTS) Equipment
- Other approved project costs, if applicable
- Non-refundable GST.

The total project cost is the sum of the components above.

#### 3.4.3.1 Building Construction Costs (includes site development)

The approved budget is to be used for the physical construction of the school facility and the normal site development costs incurred when undertaking a typical school construction project, including the following:

Building substructure and structure	Exterior walls and cladding
Interior fixed partitions and moveable partitions	Vertical movement systems (elevator, escalator)
Finishes (interior and exterior)	Electrical systems
Mechanical systems	All services on the school site (water, sewer, gas, etc.)
Allowances (design, construction, contingency)	Telephone and data site services
Electrical and mechanical site services	Hard surfaces including fire lane(s)
Fire protection	General conditions and permits
Landscaping (as required to meet the requirements of authorities having jurisdiction and to provide safe access and site drainage)	LEED Certification
Fixtures in the building, such as millwork (including classroom shelving), storage units and counters, gymnasium equipment (basketball backstops, climbing frames, floor inserts required for volleyball or badminton), fixed library shelving, gymnasium equipment storage and dividers for classrooms, gymnasium	Cost escalation

and lockers

Note: The total project cost does not include extraordinary site costs, site acquisitions, access roads to the site, services to the site, or any other landscaping features beyond a five-metre perimeter of the building envelope. The school jurisdiction should work in consultation with the local municipality and the site developers to ensure these items are addressed.

### 3.4.3.2 Consultants' Fees

The approved budget for consultants' fees is for a prime consultant to provide basic services in accordance with the Alberta Association of Architects (AAA) and the Association of Professional Engineers and Geoscientists of Alberta (APEGA) recommended conditions of engagement for building projects and Schedule of Professional Fees (see Appendix B):

Basic services include the work of architectural, structural, mechanical, electrical and municipal engineering professional services related to the building construction/site development component.

School jurisdictions and prime consultants are expected to conclude fixed fee agreements for full basic services. School jurisdictions and their consultants should be guided by the definitions within the schedules of Basic and Additional Services developed and published by the AAA and APEGGA.

The consultants' fees are a percentage of the building construction/site development component of the approved budget, for all projects including modular classrooms.

### 3.4.3.3 Project Expenses

The approved budget for project expenses is for normal project expenses and additional or variable services associated with a school building project. These expenses and services include the following:

Consulting services beyond basic services, such as facility planners, landscape architects, acoustic specialists, interior designers, cost consultants, etc.	Site surveys
Soils reports	Roof assessments, inspections and reporting (if required)
Environmental assessments (Phase 1 Environmental, see Form 8: Transportation and Site Requirement Checklist)	Provision of small scale plans of school buildings
Commissioning of mechanical and electrical systems	Development and building permits
Materials testing and reporting for items such as bore holes, compaction and soils, concrete and mortar	Printing and photocopying, plotting of computer-generated drawings, communication such as postage, long distance telephone calls, courier and travel.

The project expenses are generally calculated as a percentage of the building construction/site development component of the initial approved budget only. Calculation of the project expenses component is the building construction/site development cost times the appropriate percentage (see Appendix B).

#### **3.4.3.4 Furniture and Equipment**

The approved budget for furniture and equipment is for the basic furniture and equipment for approved capital projects. Examples include the following:

- stand-alone furniture or storage units and trolleys
- lockers for Grades 7-12
- stage lighting
- clocks
- bleachers
- commercial kitchen fixtures and related air systems
- voice enhancement systems in classrooms
- roll shutters
- air conditioning
- playground equipment
- filing cabinets.

A more complete list can be found in Appendix I.

The furniture and equipment component does not provide funding for the following:

- Fixtures included in the building construction/site development component of the approved budget.
- Computer equipment and local area networks which are funded under Education's Base Instruction funding.

The furniture and equipment component is calculated as a percentage of the building construction/site development component of the initial approved budget only. Calculation of the furniture and equipment component is the building construction/site development cost times the appropriate percentage for all projects, including modular classrooms (see Appendix B).

#### **3.4.3.5 Career and Technology Studies (CTS) Equipment**

The approved budget includes funding for projects that provide for or upgrade a CTS area(s). The school jurisdiction should provide a list of CTS pathways it intends to offer within the CTS areas. Note: For each qualified, new or modernized CTS lab within a major capital project, an allocation of \$100,000 for CTS equipment will be provided.

#### **3.4.3.6 Other Approved Project Costs (Ancillary Work)**

If other options are shown to be unavailable or not practical, additional funding will be considered on an individual basis and may be provided for approved capital projects, in which ancillary work is required. Ancillary work includes additional and unforeseen costs such as:

- asbestos abatement.
- demolition and material removal costs for entire buildings or wings.

After the approval of a capital project and prior to tender, the school jurisdiction must submit a consultant's report identifying the need for the ancillary work, the proposed method of remediation and the estimated cost of the remediation to Infrastructure, Learning Facilities Branch for review, who will then provide a recommendation to Education.

#### **3.4.3.7 Non-Refundable GST**

Funding for the non-refundable GST will be added to the approved budget.

### **3.5 Charter Schools**

Information on Education's support for newly established or existing charter schools can be found in Appendix G: Protocol for Provision of Space For Charter Schools.

A new Charter School may be established following a process identified in the *Charter School Regulation*. Expansion of enrolment would require approval of Education and be subject to available space.

The province is taking action to ensure that charter schools in the future will own the buildings they occupy or have long-term leases in place to align with the length of the school's charter – this will provide an added sense of stability to both students and their families. A collaborative approach involving government, school jurisdictions and municipalities, will provide charter schools with more control over their facilities. The approach is to transfer ownership of facilities from school jurisdictions directly to the charter schools or to secure long-term leases of the buildings. These title transfers and long-term leases will allow charter schools to better plan for the future, because their school buildings will be available for at least the length of the school's charter term.

### **3.6 Submit Your Three-Year Capital Plan**

#### **3.6.1 Submission Considerations**

The following should be considered in submitting capital funding requests:

- Jurisdictions are to include all new, addition and replacement schools and preservation and upgrading of existing school facilities in priority order. Note: Beginning with the submission in the 2013-14 fiscal year for the 2013-2016 Three Year Capital Plan, leases are no longer to be included in the submission.
- Clearly differentiate between a new school request that will add capacity to accommodate increasing enrolment and a replacement school request to handle existing enrolment.
- When prioritizing major modernization requests, include minor expansions, upgrading, and facility adjustments to address declining enrolment, etc. in this category. Major modernizations include demolitions and additions of small areas.
- It is the responsibility of a school jurisdiction to provide the rationale for the proposed project including past enrolment and expected enrolment trends, capacity requirements, program needs and facility condition.
- Requests for modular classrooms, if part of a new core school request, should be included in the Web Application Program (WAP) submission (see next section). However, requests for replacement of older portables or new modular classrooms to accommodate enrolment



growth are only submitted to Education annually through the modular classroom program (see section 10).

- All WAP applications are reviewed by Education and Infrastructure. The review may include the transferring of a project to the most appropriate program (Expansion or Modernization). School jurisdictions will be notified of any changes.
- School jurisdictions should submit a single request for any projects that have multiple components (for example, a project may include a modernization, and addition, and a demolition). The request should be made under the category that reflects the primary type of project (for example, should the modernization portion of the project be largest, the project should be categorized as a modernization).

### **3.6.2 Web Application Program (WAP)**

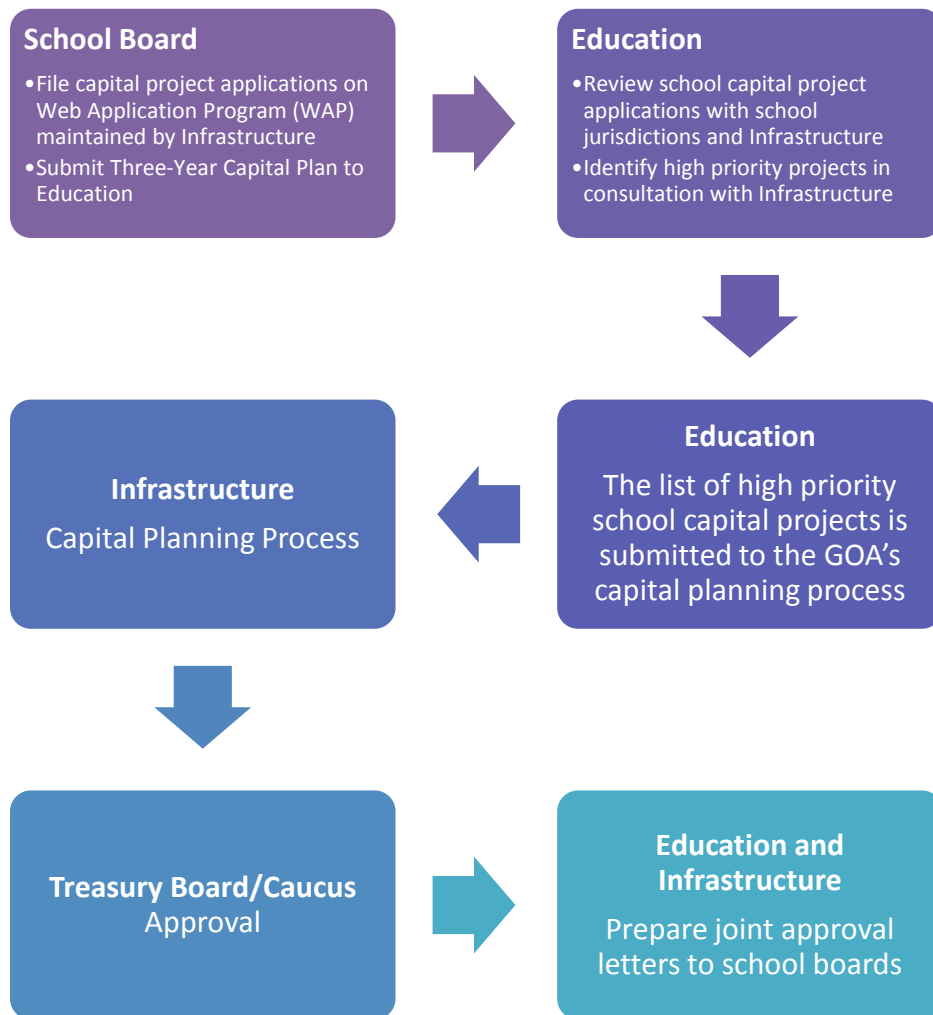
School jurisdictions must submit their Three-Year Capital Plans to Education by April 1 for the next year's school year. Capital projects identified in the Three-Year Capital Plans must also be submitted through Infrastructure's Form 2: Expansion and Modernization Application, available on the Web Application Program (WAP).

Infrastructure will provide each school jurisdiction with the required User-ID and Password for accessing the WAP site. Users are required to maintain the security of their passwords, including changing the password every 60 days. New users and previous users whose passwords have expired must contact Infrastructure for assistance. The WAP will be available to jurisdictions to enter data for a period of time as determined jointly by Education and Infrastructure.

For more information on accessing the WAP site and passwords, please contact the region Director in Learning Facilities Branch, Infrastructure.

## 4. Approval Process for School Building Projects

As required by the School Act, Part 7, Division 2, ministerial approval must be obtained before a school jurisdiction can begin work on any capital project. There will be no funding provided to a jurisdiction for a project that has been started without prior written ministerial approval.



## 4.1 School Capital Funding Priorities

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

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

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

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

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

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

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

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

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

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

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

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

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

## **4.2 Approval of Projects**

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

## 5. Project Implementation

### 5.1 Limits of Approval

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

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

### 5.2 Project Delivery

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

### 5.3 Prior to Project Start-up

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

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

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

## 6. Grant Funded Projects

In a grant funded project a school jurisdiction will receive a grant from Education to deliver the project. Failure to comply with terms and conditions set out in the grant agreement or the School Capital Manual may result in the Minister terminating the grant agreement.

If a project does not proceed to tender within one year of the date of the approval letter, the project's priority may be reviewed and approval subsequently withdrawn.

### 6.1 Requirements and Guidelines for Approved Capital Projects

For an approved project, a school jurisdiction may reallocate the funding among the capital cost components subject to the following limitations:

- Funding established for consulting fees and cost consulting fees are not transferable to other components of the project and must be used only for the approved component.
- Funding cannot be transferred from other components to increase the building construction/site development component or the furniture and equipment component, unless Education and Infrastructure review and approve the transfer.
- Funding for non-refundable GST will be 1.6% of the sum of the other components of the budget.
- As per section 3.4.3.2, funding for consultants' fees is provided (see Appendix B). School jurisdictions are required to obtain the full range of basic services for the project from their consultants.

### 6.2 Management, Reporting and Audit of Approved Funding

School jurisdictions must comply with legislation and policy relating to capital contributions, proceeds from sale of property including land, and interest earned, and must report these items in their audited financial statements.

- Capital advances, including related interest, must be accounted for in school jurisdiction audited financial statements in accordance with Public Sector Accounting Standards (PSAS).
- Detailed guidance on accounting and financial reporting for government capital revenue will be included in the Audited Financial Statement Guidelines document, issued to school jurisdictions in advance of the preparation of year-end audited financial statements.

#### 6.2.1 Managing Interest Income

The school jurisdiction must track interest earned on the project funding advanced and must only use the interest earned for school building capital infrastructure needs within the jurisdiction, upon approval from the Minister of Education.

School jurisdictions must use interest income, along with funding provided by Education, to manage cost overruns and complete projects.

Interest income must be used in the following priority order on:

- the project to which it relates (e.g., to cover market condition increases);
- other Education approved capital projects (e.g., to cover cost increases); and
- IMR projects.

### 6.2.2 Managing Approved Funding

If the school jurisdiction can reduce the building construction cost to an amount that is less than the approved funding and meet Infrastructure's Design and Construction Standards, the cost savings may be applied toward other components subject to the restrictions detailed in section 6.1., and with the approval of Education and Infrastructure.

Without the prior approval of Education and Infrastructure, a school jurisdiction may not apply cost savings from the building construction component to an increase in the scope of the capital project (e.g., additional space) or to other approved capital projects. Any project surpluses will be reviewed on a case-by-case basis by Education and Infrastructure. The Ministry of Education may recoup surplus project funding for redeployment to other priority capital projects.

Before the final funding on any project is released, a Statement of Final Cost (SFC) must be received by Education from the school jurisdiction indicating that the project is complete. Release of the final funding will be subject to receipt by Infrastructure of a small scale plan in acceptable format and detail.

### 6.3 Cost and Quality Requirements

All construction must conform to the *Alberta Building Code Regulation*. In addition, modernization work must follow the School Facilities Guidelines for Upgrades to Building Elements and Systems, while new construction (including replacement facilities) must conform to the Design and Construction Standards and Guidelines for School Facilities.

Current support prices for new construction include site development and contingencies within the basic building construction cost component.

### 6.4 Project Delivery Approach

There are many different approaches that can be used to deliver capital projects. The decision to proceed with a particular delivery approach will depend on the project characteristics, goals and objectives, the capacity to deliver the project and other factors. Common delivery systems include Design-Bid-Build (DBB), Design-Build (DB) and Construction Management (CM). School jurisdictions must have approval from Education and Infrastructure on the project delivery approach. The advantages and disadvantages of each approach, and factors to consider in selecting an approach are provided in Appendix J.

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

#### 6.4.1 Design-Bid-Build (DBB)

The DBB approach is the traditional project delivery approach with three distinct, sequential phases.

**Design** – a design contract is awarded to a Consultant using a value based approach.  
**Bid** – Using the documentation developed by the Consultant, construction bid documents are prepared. Contractors submit competitive, lump sum bids and the construction contract is awarded to the lowest compliant bidder.

Build – The successful Contractor moves into the construction phase of the project. The Owner maintains responsibility for monitoring the contractor’s performance until the project is completed.

This approach uses a two phase procurement process:

- Request for Qualifications (RFQ) – a prequalification process is completed through a public Request for Qualifications. This is to short list the most qualified and experienced firms.
- Request for Proposals (RFP) – the short listed (or prequalified) firms are then invited to submit a bid to complete the project. Typically, the lowest compliant bid determines the successful design-build firm.

The criteria for selecting a firm must be quantifiable and information on the criteria and the method of selection must be made available to all proponents. The school jurisdiction must submit the proposal that it wishes to accept to Infrastructure for approval.

#### **6.4.2 Design-Build (DB)**

The DB approach is a “turnkey” type of delivery system where the design and construction services are provided by a single entity the “Design-Builder”.

School jurisdictions may use a DB scheme, subject to Infrastructure’s approval, as an alternate construction scheme for approved school building projects of any size. DB procurement integrates the Consultant (designer of record) and the General Contractor throughout the project duration. This approach uses a two phase procurement process:

- Request for Qualifications (RFQ) – a prequalification process is completed through a public RFQ. This is to short list the most qualified and experienced firms.
- Request for Proposals (RFP) – the short listed (or prequalified) firms are then invited to submit a bid to complete the project. Typically, the lowest compliant bid determines the successful design-build firm.

The criteria for selecting a firm must be quantifiable and information on the criteria and the method of selection must be made available to all proponents. The school jurisdiction must submit the proposal that it wishes to accept to Infrastructure for approval.

Generally, there are only two distinct entities in this arrangement – the Owner and the Design-Builder. The Design Build entity is usually led by a Contractor who forms a contract with the design firm.

Alberta Infrastructure employs a DB variant by engaging a Bridging Consultant to develop the design drawings to approximately 25 per cent. This ensures that a basis of design is established which the Design-Builder must follow.

The following conditions also apply:

- School jurisdictions must provide an assurance that the project will be completed within the approved budget.
- A DB contract in excess of \$200,000 must be publicly tendered.
- A stipulated price form of contract, such as the Canadian Construction Documents Committee – CCDC-14-2013 available at [www.ccdc.org](http://www.ccdc.org), should be used.
- Any school building contract valued over \$200,000 must be approved by Infrastructure’s Contracts Review Committee (CRC) prior to award.



### 6.4.3 Construction Management (CM)

School jurisdictions may use a CM approach, subject to Infrastructure's approval, as an alternate scheme of construction for approved school building projects of any size. This approach allows the design and construction roles to overlap, thereby potentially reducing the overall project schedule. It can also help with more informed decision making. This approach uses a two phase procurement process:

- Request for Qualifications (RFQ) – a prequalification process is completed through a public RFQ. This is to prequalify the most experienced Construction Management (CM) firms who can best provide the specific services needed.
- Request for Proposals (RFP) – the prequalified CM firms are then invited to compete for the project. Typically, the lowest compliant bid determines the successful design-build firm.

The criteria for selecting a firm must be quantifiable and information on the criteria and the method of selection must be made available to all proponents. The school jurisdiction must submit the proposal that it wishes to accept to Infrastructure for approval.

The school jurisdiction must identify what type of CM services they will be procuring: Construction Manager as Agent (refer to CCA Document No. 5 - 1988) or Construction Manager as Contractor. A rationale for the type of CM Services procured and the project specific roles and responsibilities of the CM to be performed as part of the contract agreement should be provided to the region Director in Learning Facilities Branch, Infrastructure.

The following conditions also apply:

- All sub-trades that equal or exceed \$200,000 or at least 90 per cent of the total construction work must be publicly tendered.
- School jurisdictions must provide an assurance that the project will be completed within the approved budget.

The construction management firm must not be involved in any actual construction except for the following:

- hoarding
- site clean up
- supply of temporary project shacks and cover
- supply of temporary heat
- supply of temporary toilet facilities
- hoisting
- supply of temporary services including telephone, water and power to the site
- miscellaneous items for which a sub-contract bid is not usually called, including casual carpentry and blocking for other trades.

### 6.4.4 Integrated Project Delivery

School jurisdictions may use an Integrated Project Delivery (IPD) scheme in combination with any of the above noted procurement methods. However, IPD is most commonly associated with the Construction Management procurement scheme.

School jurisdictions may use an IPD process, subject to Infrastructure's approval, in conjunction with another construction scheme as outlined above for approved school building projects of any size, subject to fulfillment of the following guidelines:

School jurisdictions must provide an assurance that the project will be completed within the approved budget. School jurisdictions must provide an outline of the anticipated IPD process that includes the following:

- The Alternative Procurement scheme that will be used in conjunction with the IPD process and the rationale for selecting that scheme. Identify any risks and/or benefits associated with that selection.
- The IPD Coordinator including their name, experience and roles and responsibilities throughout the project.
- The Integrated technology sharing solution selected to facilitate the project documentation, communication and work flows. Identify how this technology will be used by the project team and any risks and/or benefits associated with the selected technology solution.
- School jurisdictions must also meet all of the requirements of the proposed project delivery approach (Design Bid Build, Construction Management, Design Build) to be used in conjunction with the IPD process as outlined above.

## 6.5 Project Stages

The following project stages describe the general steps and requirements for a capital project. The steps and requirements should be confirmed with Education and Infrastructure as part of the approval of the delivery method.

School jurisdictions must submit information to Infrastructure and/or Education for review at identified stages. The schedule of payments is defined as follows:

Project Approval: 20 per cent of approved Total Provincial Support (TPS)

Post-tender: 60 per cent of approved TPS

Project Close-out: 20 per cent of approved TPS

**Note that, alternatively the schedule of payments may be determined by the Ministers of Education and Infrastructure to meet capital financial requirements.**

Links to resources referred to in this section can be found in Appendix H.

### Project Approval

Education and Infrastructure will provide formal written notification to school jurisdictions of approved projects. The first payment of the TPS will be provided to the school jurisdiction.

### Stage 1: Start-up

Prior to commencement of the project, school jurisdictions must submit to Infrastructure the names of the project design team members, including the project prime consultant and sub-consultants, the cost consultant and the individual assigned to act as the school jurisdiction's project manager, and a description of their related experience. A proposed project schedule must also be provided.

### Prime Consultant Services

The school jurisdiction must retain a prime consultant for new and modernization projects. This could be either the architectural consultant or the engineering consultant responsible for design of the largest portion of the work.

The prime consultant will function as the project coordinating registered professional and provide the required team of registered professionals of record as required by the Alberta Building Code Part 2.

All school capital projects should receive full basic services as outlined by the Recommended Conditions of Engagement & Schedule of Professional Fees for Building Projects jointly developed by the AAA and the APEGA. It is strongly recommended that school jurisdictions consider Infrastructure policy in their consultation selection process including the following methods:

For commissions exceeding \$75,000, a Value-based Selection method is recommended. For commissions less than \$75,000 a Qualifications-based Selection process is recommended.

For owned infrastructure commissions over \$75,000, the Canadian Standard Form of Contract for Architectural Services is used as the basis for consultant contracts. Service contracts of \$75,000 or greater are subject to contracting and tendering requirements, including but not limited to the NWPTA.

### **Cost Consultant Services**

Cost consulting services are to be provided by an independent professional quantity surveying practice. These services are required for all projects where the building construction/site development component exceeds \$1,000,000. Cost consulting services include:

#### **Cost estimates for each submission.**

Cost checks and costing input as necessary at each stage to bring the project construction estimate within approved budget.

Required services constitute full services for a complex construction project, while actual services required will be dictated by project requirements and the number of submissions required by the school jurisdiction.

School jurisdictions and cost consultants are expected to conclude fixed fee agreements for the required services at the various stages (see section 3.4.3.2 and Appendix B). If additional fees are required for project requirements, the project expenses component can be used.

#### **Consulting Fees**

It is recommended that school jurisdictions conclude fixed fee agreements within the approved cost components for services in the total project cost (see section 3.4.3.2 and Appendix B).

Additional fee support will not be provided if the tender cost for construction exceeds approved costs or the approved pre-tender estimate.

### **Stage 2: Schematic Design**

Early in the schematic design phase school jurisdictions must submit to Education drawings to ensure that programming needs have been addressed and that the built student capacity will meet the approved student capacity. These drawings will typically be at 15 per cent stage of schematic design.

School jurisdictions must submit two (2) copies of each of the following deliverables to Infrastructure for approval:

- schematic drawings (30 per cent)
- elemental cost plan
- design brief
- project report - addressing consultant team code analysis, detailed documentation of scope of work (audit upgrading), design criteria applicable to the project and education program, project schedule with phasing to address instructional needs during construction and Total Project Cost (TPC) breakdown, including soft costs.

The Project Report must indicate where the minimum standards identified in the Design and Construction Standards and Guidelines for School Facilities have not been met and the reasons why. The document is available on Infrastructure's website at <http://www.infrastructure.alberta.ca/738.htm>. Note: This document is under review and will be updated once the review is complete.

### **Approval required**

If approved by Education and Infrastructure, Infrastructure will send notification to the school jurisdiction authorizing them to proceed to working drawings.

### **Stage 3: Interim Submissions**

Interim submissions may be required for specific projects if the project scope and budget do not continue to conform to the reviewed Schematic Design drawings. Should any changes to scope or budget be proposed or anticipated, the following deliverables must be submitted to Infrastructure:

- Revised documents incorporating any substantive deviations from the approved drawings or project scope - for further review prior to commencing working drawings.
- Identified revisions to bring the project back within approved budgets if cost estimates at any stage indicate the project will exceed the TPC budget and funding.

### **Approval required**

If approved by Education and Infrastructure, Infrastructure will send notification to the school jurisdiction authorizing them to proceed to working drawings.

### **Stage 4: Pre-tender/Construction Drawings**

At least four weeks prior to the proposed date of tender, school jurisdictions must submit to Infrastructure for approval electronic (pdf) copies or two (2) hardcopies of the Pre-tender report and detailed pre-tender estimate in uniformat (separated into expansion component and modernization component, if applicable), including a trade breakdown. Electronic documents are preferred.

It is expected that prior to going to tender all projects are on budget. Should the pre-tender estimate be over budget the jurisdiction must identify the source of additional funding and Education must approve the additional budget requirement prior to Infrastructure's approval to proceed to tender.

### **Approval required**

If approved Infrastructure will send notification to the school jurisdiction authorizing them to proceed to the Tender stage.

### **Stage 5: Tender**

School jurisdictions must submit one full package of the documents for tender (e.g., drawings, specifications and all addenda) to Infrastructure. A 60-day tender acceptance period is required.

School jurisdictions are responsible for all costs and expenses relating to the project, including any cost overruns incurred.

### **Contracting Requirements**

#### **Projects over \$200,000 in Construction Value**

School jurisdictions are required to comply with applicable provisions of provincial agreements such as the Agreement on Internal Trade (AIT) and the New West Partnership Trade Agreement (NWPTA) respecting procurement of goods and services necessary to complete an infrastructure project. GOA-funded projects will be subject to compliance with the *School Buildings and Tendering Regulation*. Any school building construction contract valued over \$200,000 must be approved by Infrastructure's Contracts Review Committee (CRC) prior to award.

Ministerial approval given to proceed with tendering of the project assumes a standard design-bid-build process of project delivery, with a stipulated price form of contract such as the Canadian Construction Documents Committee available at [www.ccdc.org](http://www.ccdc.org)

For DBB use CCDC-2 – 2008.

For DB use CCDC-14 – 2013.

For projects with construction cost of less than \$500,000, school jurisdictions with sufficient capacity may complete construction with own forces. Any sub-contracts over \$200,000 must be submitted to Infrastructure for CRC approval.

Project delivery by construction management for projects over \$200,000 requires Infrastructure approval of the scheme prior to the jurisdiction proceeding with obtaining tenders or quotations from builders and suppliers.

#### **Contracting Requirements - Services over \$75,000 in Value**

Contracting principles govern procurement by contract of all goods and services necessary to complete a building infrastructure project, including furnishings and equipment procurement contracts. School jurisdictions are expected to use a value based selection process to procure consultant services. This means that the successful proponent will be the one whose proposal offers best value, taking into consideration both qualifications and price.

#### **Avoiding Unnecessary Bid Requirements**

Recent experience has demonstrated a growing number of projects where the lowest bid submission was deemed non-compliant because it failed to meet the requirements for completing various appendices attached to the bid documents. As a consequence, the school jurisdiction has sometimes had to secure additional funding to award the project to a compliant, but higher bidder.

To reduce the number of these instances, school jurisdictions should work with their consultants to ensure that calls for bids require only those types of information that are absolutely necessary

for consideration of the contract award (i.e., firm name, price, signature, seal, date and insurance).

Supplementary information can be obtained by indicating within the bid documents that further details may be requested of the bidder after tender opening (i.e., lists of sub contractors, cost breakouts, alternate prices and separate prices).

## **Stage 6: Post-Tender**

### **Post-Tender Procedures for Projects over \$200,000**

All projects must be tendered in accordance with the *School Buildings and Tendering Regulation* and with the New West Partnership Trade Agreement at <http://www.newwestpartnershiptrade.ca/> as it pertains to school jurisdictions. Notwithstanding, any stipulated lump sum tender (or sub-trade tender within an alternative scheme, e.g., construction management) in excess of \$200,000 must be submitted to Infrastructure for review and approval.

School jurisdictions must submit bids/tenders for Infrastructure's review and approval prior to awarding contracts over \$200,000. These are contracts that require Contract Review Committee (CRC) approval prior to signing.

The following documentation is required to be submitted in electronic format (PDF). Please do not submit original documents:

- Bid documents issued to bidders and any addenda, if not previously submitted at the time approval to tender was sought.
- A list of all bidders and their respective prices, including base bid prices and alternative prices where applicable.
- Bid submissions for all bidders, including all specified attachments, including bid bonds, performance bonds, site safety compliance certificates, sub-trade lists, etc. (including any bids judged to be invalid or non-compliant).
- Copy of any requests to withdraw after the bid closing time, stating reason for withdrawal (e.g., error).
- Copy of any contract changes (including price reductions or incorporation of separate prices) negotiated after bid closing.
- Any other information pertinent to a bidding process irregularity of any kind.
- Letter of Recommendation from the Board (should include pre-tender estimate, bid closing date, and inclusion of alternate/separate price items if applicable).
- Letter of Recommendation from the Board's Consultant.
- A stamped set of construction drawings is required by Infrastructure either prior to tender close or shortly thereafter. These drawings are kept on file for the duration of construction.

In order to allow sufficient time to review the documentation and present it to CRC, please ensure that bid packages are submitted at least 45 days prior to the bid expiry date.

### **Approval required**

If approved, Education and Infrastructure will send a letter to the school jurisdiction authorizing them to accept the tender. School jurisdictions must submit a copy of the signed contract with a contractor or subcontractors, in the case of a construction or project management scheme, or notification of the start of construction when own forces are used. Once the tender is approved by CRC, the second payment of the funding will be provided.

**Stage 7: Construction**

School jurisdictions will submit a copy of the Certificate of Substantial Completion to Infrastructure within 15 days of being issued by the prime consultant.

The school jurisdiction must receive copies of record drawings and operations and maintenance manuals from the prime consultant.

Jurisdictions must also provide small scale plans to Education and Infrastructure once the building is occupied.

**Stage 8: Close-Out**

School jurisdictions must submit a Statement of Final Costs no later than twenty-four (24) months after the date of Substantial Completion. Upon approval the remaining TPS funding will be provided.

If 24 months pass without receipt of the Statement of Final Costs, the school jurisdiction will be advised that the project is closed and no further funds will be advanced.

Should the jurisdiction encounter any extenuating circumstances that would warrant an extension in the timelines, written notification should be forwarded to Education's Executive Director, Capital Planning outlining the situation and requesting an extension.

## 7. Infrastructure Managed Projects

Since May 2011 many of the approved new, replacement and modernization school projects have been procured and delivered by Infrastructure. Education and Infrastructure will jointly support school jurisdictions throughout the process.

Shortly after school projects are approved and announced, a preliminary meeting will be held with representatives of the school jurisdictions, Education and Infrastructure to discuss the project scope and affirm capacity and grade structures of the schools. Any changes to the project scope or costs will require specific approval before proceeding. This includes any increases to the school building area beyond the approved area.

Consultants/architects will be engaged by Infrastructure, not the school jurisdictions.

### Role of School Jurisdiction

- Providing functional program and design input. The school jurisdiction must determine educational programming emphases (including CTS strands), provide input on design and program and coordinate and identify a primary spokesperson who can speak on behalf of the jurisdiction (e.g., administration, teachers, parents, etc.).
- Navigating their local processes. The school jurisdiction must ensure that school board meetings are held to provide timely responses and decisions to aspects of the design. Stakeholder input must be gathered by the school jurisdiction and provided in a timely manner.
- Creating the community partnerships. School jurisdictions are responsible for having discussions with interested partners and receiving commitment within parameters (e.g., time).
- Participating in design reviews. School jurisdictions are involved in reviews of the schematic designs at 30 per cent, 70 per cent, 90 per cent, etc. School jurisdictions must sign off on the final design at the Development Reports stage. Education must approve the design to ensure that it meets programming and capacity requirements.
- Providing furniture and equipment, including CTS. School jurisdictions are responsible for fitting up the schools and making any decisions regarding needed furniture and equipment for the schools.
- Operating the schools.

### Role of Education

- Lead the planning of the projects. Education will affirm scope, capacities, grade configuration, sites, and programming needs to the point of design.
- Education included in the design meetings. Education Senior Managers in Capital Planning will be involved in all of the design meetings to provide school jurisdictions with support in the area of education programming (e.g., CTS, fine arts, etc.). Education Senior Managers in Capital Planning will continue to liaise with school jurisdictions and the project managers throughout the project.
- Provide the budgets for Furniture and Equipment (F&E) and Career Technology Studies (CTS). Education will provide school jurisdictions with budgets for F&E and CTS one year prior to the completion of the project. See section 3.4.3.4 for more information on F&E.
- Partnerships and funding agreements. Education, in collaboration with the school jurisdiction, will engage in discussions on partnerships and receive commitment from the partners. Education will also develop funding agreements for school jurisdictions and third party contributors to the project.



- Education must sign off all pre-tender estimates that are over budget prior to Infrastructure proceeding to tender.

**Role of Infrastructure**

- Lead implementation of approved projects. Infrastructure will engage and manage the services of professional consultants and general contractors to carry out design and construction.
- Project management and direction. Infrastructure will be responsible for the following:
  - schedule, cost, scope, quality
  - procurement: RFQ, RFP, tender process
  - contract award.
- Contract management. Infrastructure will be responsible for the following:
  - coordination of design and construction
  - site Meetings
  - instructions to contractors, change orders, payment.

## 8. School Design

In keeping with Education's commitment to Inspiring Education, school jurisdictions are encouraged to use innovative approaches in design and construction of school capital projects. Consideration should be given to the programming needs of the school, community needs and partnerships and the opportunities and limitations of the specific site. All new school projects are required to meet LEED (Leadership in Energy and Environmental Design) Silver certification requirements.

Guidelines for school design and area allocations are provided for use in the design of new, replacement and modernization projects. The Education Design Standards (Appendix C) include area allocations for classrooms, science rooms, ancillary rooms, gymnasiums, gymnasium storage, libraries, as well as a variety of non-instructional areas.

Changes to school design standards were implemented in 2011 and include:

- new mandatory areas: wrap-around space, accessible washrooms, recycling rooms
- increased areas: larger mechanical areas, standard size of small gymnasiums.

All new school projects are required to meet the 2011 Education Design Standard Guidelines. School design will incorporate a combination of permanent and modular space.

### 8.1 Career and Technology Studies (CTS) Labs

Schools offering K-9, K-12, middle school (Grades 5-9), junior high (Grades 7-9), and senior high (Grades 9-12 or 10-12) programs are eligible for CTS labs which may be provided through expansion and modernization projects. The minimum eligibility is one CTS lab for every 200 students enrolled in Grades 7 or higher. The allocation of space for each lab will be 200 m<sup>2</sup>, including wall and circulation areas.

To determine how many CTS labs a school is eligible for, the total number of students enrolled in Grades 7 or higher is divided by 200. The nearest whole number is the total number of CTS labs.

Example:

Middle School (Grades 5-8)

Total enrolment is 550 students, 279 students in Grades 7 and 8

$279 \text{ enrolment} / 200 \text{ students per lab} = 1.40$

Result - This school is eligible for 1 CTS lab.

## 9. Area, Capacity and Utilization

Every year, Alberta Infrastructure sends Area, Capacity and Utilization (ACU) reports to each jurisdiction. The reports provide information about the gross area, capacity and, utilization rate of their facilities. Gross area is used in the calculation of IMR funding, and capacity and utilization rates contribute to planning decisions such as modular classroom allocations and capital project approvals. It is important that jurisdictions carefully review these reports as jurisdictions are responsible for verifying the accuracy of the information and notifying Infrastructure of any errors or omissions.

### 9.1 Area

#### Instructional Area

Instructional area is defined as any room or area within a school that is or could be primarily designated as a learning area. This can include areas that have a variety of uses during the day but do not include areas that are used sporadically as teaching spaces or for occasional lectures. Instructional area includes but is not limited to classrooms, science labs, ancillary rooms, breakout rooms, computer and IT labs, stages, music, art and drama rooms.

#### Exempt Area

Some space in a school may be exempt from the instructional area, which will reduce the school and jurisdiction capacity.

Exemptions are:

- area leased to the public sector and non-profit groups, with the lease rate being at cost or for a nominal fee (e.g., not-for-profit daycare).
- area leased by private schools
- area leased by charter schools
- decentralized administration space in schools.

Area exemptions will not be granted for space leased to the private sector.

### 9.2 Capacity

Net capacity of a school is determined by dividing the instructional area of the school by an instructional area per student, and then adding the rated capacity for CTS labs, gymnasiums, physical activity rooms and libraries. Net capacity is calculated using the following formula:

$$\text{Net Capacity} = \frac{\text{Instructional Area}}{\text{Area per student}} + \text{Rated Capacities}$$

$$\text{Instructional Area} = \text{total area (m}^2\text{) of all instructional space}$$

#### Rated Capacities

$$= \text{CTS} + \text{Gyms} + \text{Physical Activity Rms} + \text{Learning Commons (Libraries)}$$

The small scale plan is used to identify all instructional spaces. Any exempt space is subtracted from the instructional area.

The total instructional area is divided by an instructional area per student which is the average from the Education Design Standards (see Appendix C) and varies according to the grade

configuration of the school.

Grade configuration of school	Instructional area per student
K-3 K-4 K-6	3.47 m <sup>2</sup>
K-9 5-9	3.61 m <sup>2</sup>
K-12 7-9 7-12	3.69 m <sup>2</sup>
9-12 10-12	3.65 m <sup>2</sup>

The instructional area, divided by the instructional area per student is the base capacity for the school.

Gymnasiums, libraries, physical activity rooms, and CTS labs are all given a rated capacity which is added to the base capacity.

- **CTS labs:** 20 student spaces per lab
  - CTS labs have a smaller capacity to allow for additional space for specialized equipment.
- **Physical activity room:** 20 student spaces per room
  - Physical activity rooms are typically weight rooms or fitness rooms, where equipment can often take up a large portion of the space.
- **Learning Commons (Libraries):** Zero student spaces will be assigned if the school offers any grade combination that includes Kindergarten to Grade 6 or if the base capacity is less than 300. Otherwise a capacity of 25 is assigned.
- **Gymnasiums:** Zero student spaces will be assigned if the school offers any grade combination that includes Kindergarten to Grade 6 or if the base capacity is less than 300. Otherwise gymnasiums are rated as follows:
  - gymnasiums 0 – 640 m<sup>2</sup> are rated at 25
  - gymnasiums 641 – 800 m<sup>2</sup> are rated at 50
  - gymnasiums greater than 801 m<sup>2</sup> are rated at 75.

**Calculating Capacity of Outreach Facilities**

The utilization rate for outreach schools is calculated differently from other schools because of the need to recognize the number of part-time students in attendance. A capacity of 25 spaces is assigned for the first 130 m<sup>2</sup> of gross area with an additional 25 spaces allocated for each additional 90 m<sup>2</sup> of gross area.

Examples:

<u>Gross Area (m<sup>2</sup>)</u>	<u>Capacity</u>
130	25
220	50
310	75

Utilization is calculated by dividing the full-time equivalent (FTE) enrolment, as provided by Education, by the capacity.

In outreach schools where the FTE Enrolment (as opposed to headcount) exceeds the capacity (because of the number of part-time students), the utilization rate is set at 100 per cent. For example, a school with a capacity of 675 and a FTE enrolment of 1900 would have its utilization rate set at 100 per cent. Capacity and enrolment for outreach schools are not included in jurisdiction utilization rates.

### 9.3 Utilization Rate

The utilization rate measures the student capacity of a school or jurisdiction's facilities. Displayed as a percentage, utilization rates give insight into how close a school or jurisdiction is to its maximum student capacity. A school is considered to be full, using all of its instructional area, when the utilization rate is 100 per cent.

An instructional area model for determining capacity was approved for implementation in the 2014 - 2015 school year. It focuses on instructional area — the space in a school where students can learn.

The utilization rate for a school is determined using the following formula:

$$\text{Utilization Rate} = \frac{\text{Total Adjusted Enrolment}}{\text{Net Capacity}} \times 100$$

School jurisdictions, in consultation with Education and Infrastructure, have established geographic sectors within each school jurisdiction for the purposes of calculating utilization rates.

#### Enrolment

The revisions to the utilization formula did not impact the calculation of the adjusted enrolment used in determining the utilization rate. Education is currently conducting a review of the Special Education codes. Once this review is complete, the approach to determining adjusted enrolment in the utilization formula will be reviewed.

#### *Total Adjusted Enrolment*

$$= \text{ECS} \times 0.5 + (\text{Grades 1 to 12} - \text{severe disabilities}) + \text{severe disabilities} \times 3.0$$

Student enrolment numbers are submitted by jurisdictions to Education in the fall of each year. The adjusted enrolment for a school uses a Student Allowance Factor to account for the additional space required by some students with special needs for the effective and safe delivery of programs. Students with severe disabilities are counted at a factor of three.

#### Designated Special Needs Schools, Knowledge and Employability (K&E) Schools or ESL Schools

A school or a portion of a school may be designated as a Special Needs School, a K&E program school or an ESL program school where the entire student population will be students with special needs, K&E or ESL students as follows:

- In urban areas, school jurisdictions must identify an entire school for designation as a Special Needs, K&E or ESL School.
- In rural areas, school jurisdictions must identify a separate wing of a school as a Special Needs, K&E or ESL school.
- School jurisdictions may apply to Education to have a school or portion of a school (rural areas only) designated as a Special Needs, K&E or ESL School.

Education, in consultation with Infrastructure, will review the designation application. Infrastructure will also review the proposed facility to determine its ability to accommodate these programs. If the application and facility are acceptable, a school (urban location) or separate wing of a school (rural location) will be designated as a Special Needs, K&E or ESL school.

The Student Allowance Factors for these schools are 3.0 for students with severe disabilities and 1.5 for students with mild/moderate disabilities, K&E and ESL students.

The enrolment of the designated school or wing of a school will be included in the calculation of a jurisdiction's utilization rate, but will be excluded from a geographic sector utilization rate.

### **Annual Updates and Review Process**

Each year school jurisdictions will be required to send updates to the Instructional Area Forms (Form 18) for each of their schools. This should include any changes to the instructional area (i.e., through the addition or removal of modulars), and any changes to the exempt space. In addition, for any new schools, jurisdictions are required to submit a new Instructional Area Form, as well as the small scale plans and data sheets to [edc.cpdata@gov.ab.ca](mailto:edc.cpdata@gov.ab.ca) for review.

Each year school jurisdictions will be sent Area, Capacity, Utilization (ACU) reports with detailed information on each of their schools. These include information on gross area, instructional area, rated areas, adjusted enrolment, capacity (based on the Instructional Area form), and utilization rates. Utilization rates are provided for each individual school, for the jurisdiction overall, for open schools in the jurisdiction and for closed schools in the jurisdiction. Combined utilization rates do not include outreach facilities. If a jurisdiction identifies errors or omissions with the information on the ACU reports, they should contact Education, Capital Planning by email at [edc.cpdata@gov.ab.ca](mailto:edc.cpdata@gov.ab.ca) to request a review. The email should include a detailed description of the concerns. If the concerns are related to capacity, the small scale plan and instructional area form along with room numbers, the room purpose, and a clear explanation of the issue or concern, should be included.

Education and Infrastructure will review the request and provide a response to the jurisdiction. In some cases the jurisdiction may be required to provide additional information.

## **10. Modular Classroom Program**

Modular Classrooms are standard classroom units built at a central location and transported to schools across Alberta.

Funding is provided for modular classrooms to ease enrolment pressures in communities where school jurisdictions are experiencing high student enrolment growth. Modular classrooms are provided to address increases in enrolments and may be removed as enrolment declines. Funding may also be provided for new modular classrooms to replace older portable classrooms where there are demonstrated health and safety concerns.

The modular classroom program does not apply to modular classrooms that are part of a new or replacement school or a modernization capital project. Additionally this program does not include modular classrooms for decanting.

Modular classroom units meet specifications that ensure significantly improved heating and ventilation, soundproofing, resistance to mold, ease of serviceability and several other factors that differentiate them from the older portable classroom units located at schools throughout the province. The Government of Alberta plans to replace all of the older portable units with modular classrooms as funding becomes available for evergreening.

Modular classroom units can be requested each year in early November through the Modular Submission Process.

Infrastructure has developed plans and specifications for modular classrooms that are used in the manufacturing of all classroom units. School jurisdictions are expected to use only modular classrooms built to government specifications. If the school jurisdiction wishes to use a different plan, it must submit its equivalent plans to the Ministers of Education and Infrastructure for review and approval. Drawings and specifications for modular classrooms are available from the Infrastructure Learning Facilities Branch.

Jurisdictions who wish to purchase modular classrooms outside of the modular classroom program may do so under the GOA's current contract or through their own contractor. Should the jurisdiction choose to use their own contractor they must follow all contracting and tendering requirements.

If a P3 school is fully built out to its approved capacity and the jurisdiction wishes to add additional modular classrooms this will be outside of the P3 contract and will require the jurisdictions to cover 100% of the cost to procure and set-up the modular unit. Jurisdictions should consult with their Education Senior Manager in Capital Planning as there will be implications to the DBFM agreement.

### **10.1 Modular Classroom Links**

Modular classrooms can be attached directly to a school, attached to a school using a connecting link, or remain a freestanding unit (i.e., not attached to the main school structure). A connecting link is the connecting corridor used to attach the modular classrooms to the permanent building.

The width of the modular connecting link can be adjusted to meet site conditions. A standard modular connecting link is available and has been designed to be used in conjunction with the standard modular classrooms and uses the same materials and finishes. The ends of the modular connecting links:

- are open ended to allow connection to the school building and modular classrooms;
- have double doors on one sidewall; and
- have windows on the opposite sidewall.

School jurisdictions are expected to use the standard modular connecting link, instead of site built, wood frame construction connecting links, wherever possible. If a site built, wood frame constructed link is deemed necessary, it should be no larger than is necessary to provide

sufficient setback from the permanent structure to meet the Alberta Building Code requirements for fire separation.

## 10.2 Procedures for the Modular Classroom Program

Each year, in October, Alberta Education requests jurisdictions to submit their requirements for modular units and the relocation of existing modular classrooms or free-standing portable classrooms to address enrolment pressures, health and safety issues and evergreening. Jurisdictions are required to complete forms as part of the application process (see Form 9 in Appendices and online at <http://education.alberta.ca/departement/ipr/capitalplanning/infrastructureresources.aspx>).

The submissions are due to Alberta Education by November 1st of each year and will include a prioritized list of requested units that identifies the number of units required, the school(s) to which the units are to be allocated and other necessary information as outlined in the forms.

Upon approval of new modular classrooms, jurisdictions will appoint a consultant and design team. Boards are required to submit a site plan and cost sheet to Infrastructure and Education for review and approval. Upon receipt of the completed prep sheets the jurisdiction will receive 90 per cent of the provincial funding.

Once approved, Infrastructure will order the units(s) from the manufacturer and advise the jurisdiction to proceed with the development of a pre-tender package, which includes drawings, specifications, and a cost estimate, for the delivery and set up of the modular units.

Jurisdictions must submit the pre-tender package with a letter requesting permission to tender to Infrastructure for review. Bids that are greater than \$200,000 will require approval from the Contract Review Committee (CRC) prior to the jurisdiction entering into a contract for set-up and delivery.

Jurisdictions must ensure that they are following all relevant contract legislation and requirements, including the New West Partnership Trade Agreement and the *School Building and Tendering Regulation*.

After jurisdictions award the contract, the jurisdiction or the contractor must apply for a development and building permit(s). It is suggested that jurisdictions hand over the modular site to an installation and works contractor and commence site work at least two months prior to the opening of the modular classrooms. Jurisdictions need to coordinate delivery of modular units to meet this two month recommendation.

Jurisdictions are to provide confirmation to Alberta Infrastructure when modular space is operational, and supply project plans to ensure that school capacity information is updated.

The funding allocation for furniture and equipment for new modular units is \$12,000 per unit and the allowable consultants fees are up to a maximum of 12.58 per cent of the delivery, set-up and link project costs (excludes purchase of the unit and F&E).

If the school jurisdiction has not ordered the approved modular classrooms within six months of the approval date, the approval and all associated funding may be rescinded and the modular classrooms reallocated to the next highest provincial priority.



Jurisdictions are required to submit their Statement of Final Costs (SFC) for all modular projects within six months of the completion of the installation and set-up. The statement of final costs is reviewed by Infrastructure and Education. Once the SFC has been approved the provincial portion of the actual expenditures up to the remaining 10 per cent will be forwarded to the jurisdiction.

### **10.3 Relocation of Portables/Modular Classrooms**

Funding may be available for the relocation of portables and modular classrooms from an existing school (donor school) to another school (receiver school) for the purpose of easing enrolment pressures at the receiver school. Modular relocation requests should be submitted through the annual Modular Submission Process.

Request for approval for the relocation of modular classrooms is similar to requesting new units. See Form 10 in Appendices and online at <http://education.alberta.ca/departement/ipr/capitalplanning/infrastructureresources.aspx>) for details of the specific information required for the submissions.

Upon approval of modular relocations, boards will be required to submit a site plan and relocation cost sheet to Infrastructure for review. Once approved, Infrastructure will advise the jurisdiction to proceed with the development of a pre-tender package, which includes drawings, specifications, and an updated cost estimate, for the set-up and delivery of the units.

Jurisdictions must submit the pre-tender package with a letter requesting permission to tender to Infrastructure for review. Bids that are greater than \$200,000 will require approval from the CRC prior to the board entering into a contract for set-up and delivery. There is no furniture and equipment allocation for modular relocations and the consultants' fees are to a maximum of 12.58 per cent of the delivery, set-up and link project costs.

Jurisdictions must ensure that they are following all relevant contract legislation and requirements, including the New West Partnership Trade Agreement and the *School Building and Tendering Regulation*.

If the school jurisdiction has not completed the approved modular move within six months of the approval date, the approval and all associated funding may be rescinded.

Jurisdictions are required to submit their Statement of Final Costs (SFC) for all modular relocation projects within six months of the delivery of the unit to its new location. The statement of final costs is reviewed by Infrastructure and Alberta prior to the release of the final 10 per cent of funds.

### **10.4 Declaration of Surplus Modular Classrooms**

When a jurisdiction finds that they have a modular classroom that is no longer needed to accommodate the instructional needs of students, they are to advise Education of the surplus unit(s) through the completion and submission of the Declaration of Surplus Modular Classrooms Form. See Form 16 in the Appendices and online at <http://www.education.alberta.ca/departement/ipr/capitalplanning/infrastructureresources.aspx>

## 11. Leasing of School Facilities

School jurisdictions can lease property in accordance with section 200(2) of the *School Act*. Certain conditions in the *Disposition of Property Regulation* allow school jurisdictions to lease out real property, including school buildings, without prior approval of the Minister (see Appendix E).

School jurisdictions may receive funding to lease appropriate facilities when no other space options are available to accommodate current enrolment. If jurisdictions wish to apply for lease support funding, they are advised to consult with their Education Senior Manager in Capital Planning as soon as possible after identifying any need for new or additional leased space or potential changes to existing lease costs.

Leasing arrangements are intended to be temporary solutions until permanent accommodation can be made available.

The final decision regarding whether to lease space is the responsibility of the local school jurisdiction; however, lease support funding will not be provided for any arrangements that are entered into without prior written approval from Education. Any leasing costs that are beyond the available funding provided by Education are the responsibility of the jurisdiction.

### 11.1 Submitting Requests for Lease Funding Support

Lease Funding Request forms must be submitted to Capital Planning, Education no later than March 1 each year and must include details of all leases that will be in effect for the upcoming school year (see Form 13 in Appendix K and online at <http://education.alberta.ca/departments/ipr/capitalplanning/infrastructureresources.aspx>)

Every effort will be made to inform jurisdictions of their approved lease support by June 30, following their March 1 submission and to provide the funding for any approved leases on or before September 30 for that school year.

#### 11.1.1 Submission Requirements

The lease submission consists of the completed Lease Funding Request Form detailing:

- all third-party leases including:
  - new leases
  - renegotiated/renewed leases
  - ongoing and year-to-year leases,
- all jurisdiction-to-jurisdiction leases not yet converted to IMR,
- leases related to the usage of space, eg. Gymnasiums,
- unsigned copies of the draft new or renegotiated/renewed leases agreements from first point above.

Please note, requests for lease support funding for alternative programs will not be considered unless they meet the eligibility criteria found in section 11.4.1.

Education will notify jurisdictions of approval of any lease support funding in writing. The jurisdiction must then submit copies of the signed fully executed leases to Education before funding will be released.

## 11.2 Jurisdiction-to-Jurisdiction Leasing

Education does not grant lease support funding to jurisdictions that lease facilities that are owned by other jurisdictions. Existing leases for these arrangements are being phased out.

Education will provide Infrastructure Maintenance and Renewal (IMR) funding to school jurisdictions that lease such facilities to other jurisdictions (usually to Francophone regional authorities and charter schools). See section 12 for details on the IMR Program, and funding distribution for leased space. The host jurisdiction is responsible for modernization (upgrades) of the facilities within the allocated IMR funding.

Jurisdiction-to-jurisdiction leases should also include agreement on how utilities will be paid.

The host jurisdiction is eligible to receive a capacity exemption. Infrastructure calculates the Area, Capacity and Utilization (ACU), and the exempted space is excluded from the total capacity of that jurisdiction.

If the facility is leased to a Francophone jurisdiction or charter school, the Francophone jurisdiction or charter school will be given the first priority to renew the lease.

## 11.3 Leasing Facilities for Schools

Where a school does not have a facility, Education may provide funding to lease facilities for the instruction of students. The preferred option is to lease surplus space from a public or separate school jurisdiction in the area. These leases are for a nominal amount and IMR funding is paid to the host jurisdiction. If this option is not available funding may be provided to lease other public or government owned facilities, and if no other options are available, funding may be provided to lease a third party owned facility.

Lease funding will not be provided to a school where it has a financial interest in the facility used to accommodate the school's students.

A school requesting funding for leasing costs must inform their Education Senior Manager in Capital Planning and provide relevant information including current and projected enrolment, available space, desired location and record of communication with local boards. Refer to section 11.1 for information on submission requirements and deadlines.

## 11.4 Leasing Third Party Owned (“Private Owned”) Facilities

Where it is necessary to lease third-party owned facilities, funding will be provided annually from available funds. Upon approval by the Minister, lease funding will be provided for Francophone and charter schools commensurate with the area required to support their enrolment. The remainder of the annual funding pool will be pro-rated for alternative programs according to eligibility criteria and a funding support formula.

SuperNet access should be available at the site as part of considering the facility suitability. Jurisdictions may also negotiate with the owner to ensure other cost-effective arrangements can be made for the provision of adequate Internet services.

### 11.4.1 Eligibility Criteria and Rates for Lease Support Funding

To be eligible for lease support, alternative programs in third party owned facilities must meet the following eligibility criteria.

- It is unreasonable in terms of proximity and available space to move the program to a jurisdiction-owned space.
- The privately owned facility meets current health and safety requirements and provides a suitable learning environment for the program and students.
- The present value of lease payments for the privately owned facility is less expensive than building a new facility.
- The alternative program is able to maintain stable enrolment as measured by either historical or projected enrolments.
- The privately owned facility is located within the jurisdiction's boundaries.

### 11.4.2 Funding Support Formula

The amount of lease support for alternative programs in third party owned facilities is determined based on gross area of the facility, utilization rates, current market lease rates and the following formula:

Lease Support Funding (\$) = average gross area per student (9.1 m<sup>2</sup>/student) x the lesser of adjusted enrolment and capacity (number of students) x Class C market lease rate (\$/m<sup>2</sup>) x pro-rating percentage for the year

2015/2016 Net Rent for Class C space (\$ per m<sup>2</sup> excluding operating costs)

Edmonton Downtown and Suburban	\$120.00
Calgary Beltline and Suburban	\$160.00
Grande Prairie, Red Deer, Medicine Hat	\$100.00
Other Rural Centres	\$85.00
Municipal District of Wood Buffalo	\$150.00

There is a limited annual funding pool for lease support for alternative programs. Funding is allocated each year on a pro-rated basis and is affected by the number of leases and market rates.

Funding will not be provided to a school jurisdiction for leasing of facilities:

- for purposes other than the instruction of students
- for physical and recreational activities with the exception of gymnasiums
- for lease costs that are covered by a jurisdiction's insurance
- during the period of modernizing an existing school facility
- where the lease agreement has not been approved by Education.

Note that no portion of IMR funding is provided for third party owned facilities.

### 11.5 Leasing Out Vacant Space (acting as a lessor)

Leasing space must be done in accordance with the *Disposition of Property Regulation*.

Jurisdictions that lease out space may apply to have that space exempted from their utilization rate calculation. For space exemption purposes, school jurisdictions must submit a Leasing of School Space form (see Form 4 in Appendix K) and online at

<http://education.alberta.ca/department/ipr/capitalplanning/infrastructureresources.aspx>) to Infrastructure, providing information on the area leased and the type of lessee.

### 11.6 Leasing for Outreach Programs

School jurisdictions are often required to lease third party owned facilities to operate Outreach Programs. Support for the lease costs is provided in the base funding for each Outreach program.

Additional information on these guidelines and funding for Outreach programs is available in the Education *Funding Manual for School Authorities*.

## 12. Infrastructure Maintenance and Renewal (IMR) Program

One of a school jurisdiction's highest priorities regarding their school facilities is to ensure that health, safety and essential upgrading needs, including emergent projects, are completed as required. IMR funding is provided to meet these needs and eliminate deferred maintenance. To deal with emergent projects as they arise, school jurisdictions should consider setting aside contingency funding. IMR funding is only provided for government owned facilities and is not provided for privately owned buildings.

IMR funding may be spent only for approved purposes. Jurisdictions may use the funds to:

- ensure school facilities meet all regulatory requirements, particularly as they pertain to providing a safe and healthy learning environment;
- preserve and improve the quality of the learning environment by:
  - replacing building components that have failed,
  - prolonging the life of the facility through planned, proactive replacement of major components; and
  - upgrading of the educational areas to meet program requirements;
- meet the facility requirements of students with special needs; and
- replace or upgrade building components to improve energy conservation and efficiency and to achieve costs savings as a result.

School jurisdictions that want to use IMR funding for projects estimated to be in excess of \$1 million must first request approval from the Minister of Education.

Jurisdictions with questions about whether a project can be supported under the IMR funding framework, should consult with the appropriate Education Senior Manager in Capital Planning before beginning the project.

### 12.1 IMR Yearly Process and Requirements

In September of each school year, school jurisdictions will receive up to 50 per cent of their annual IMR funding allocation, in accordance with the schedule identified in the *Funding Manual for School Authorities*. The remainder of the annual allocation will be provided to school jurisdictions by April 30 of the following year, if Education received the appropriate year-end reporting submissions from the school jurisdiction for the previous year. If the year-end IMR reporting was not completed and submitted, all future IMR allocations are withheld until the paperwork has been submitted and approved.

By October 30 of each year, school jurisdictions must develop annual IMR expenditure plans and provide them to Education upon request. School jurisdictions are not required to identify IMR funded projects in their Three-Year Capital Plan.

### Year-End Reporting

Expenditure plans and actual expenditures must be entered into Alberta Infrastructure's Renewal Capital Asset Planning Process (ReCAPP®) system on an ongoing basis throughout the year. Jurisdictions needing further information about ReCAPP® should contact their respective North or South, Alberta Infrastructure Director. The ReCAPP system will be replaced by VFA, which will be rolled out in 2015.

By December 31 of each year, school jurisdictions must complete and submit the detailed IMR Statement of Actual Expenditures (printed from ReCAPP® Report Manager Shared Reports) for the previous school year.

ReCAPP is locked every Wednesday afternoon for updates and one month a year for maintenance, internal reporting and updates. Specific assets will also be locked when they are under review by third party consultants.

When events cannot be updated in ReCAPP because assets are locked in ReCAPP, jurisdictions must submit the IMR Report Cover Sheet, downloaded from the Alberta Education School Infrastructure Resources web page (<http://education.alberta.ca/department/ipr/capitalplanning/infrastructureresources.aspx>). Note that this data should still be entered into ReCAPP® once the school is unlocked.

Cover sheets are also used for reporting on board's approved IMR allocation, previous years carryover, interest earned, events total cost in ReCAPP, signature/date from Board.

The cover sheet can also be used for projects that cannot be assigned to particular schools or for projects that require small amounts of money (less than \$500 per school) in multiple schools.

See Appendix F for details of Program Funding Priorities and Categories.

## 12.2 IMR funding and reporting for jurisdiction-owned facilities leased to other jurisdictions

Since September 2011, Education no longer provides lease support funding for facilities that are owned by school jurisdictions. Existing leases for these facilities are being phased out.

Education will provide IMR funding to public school jurisdictions that lease their facilities to other jurisdictions (usually to Francophone regional authorities and charter schools), in lieu of providing lease support to the jurisdiction using the facility (lessee).

For IMR calculation purposes, the enrolment of the leased facility will be added to the facility owner's (lessor) enrolment. In addition, the area, age of the building, location factor and GST will be included in this calculation.

Jurisdictions are expected to use IMR funding to maintain all their publicly-owned facility assets to:

- ensure facilities meet regulatory requirements
- preserve the learning environment
- replace or upgrade building components.

Decisions regarding IMR planning and expenditures are the responsibility of the lessor.

The lessee jurisdiction is responsible for the upgrading of the facility to meet the programming needs of students. When such a need exists, the lessee jurisdiction includes the funding requests in its annual capital plan submission. The approval of the lessor must be obtained prior to undertaking any renovations.

The lessor reports IMR expenses on a leased facility in the same manner as other jurisdiction IMR projects.

### 12.3 Financial Reporting

School jurisdictions should recognize IMR contributions from the Government of Alberta as revenue in the year of the corresponding IMR spending, whether expensed or capitalized. Capitalized IMR contributions have a positive effect on a school jurisdiction’s annual surplus/deficit.

Unexpended IMR funding will appear on the jurisdiction’s audited balance sheet as deferred revenue.

IMR grants used for capitalized expenditures related to school buildings must be treated as supported capital revenue and deferred as Expended Deferred Capital Revenue (EDCR) in accordance with the Audited Financial Statement Guidelines. Any other IMR capitalized grant is to be treated as board-funded.

### 12.4 Calculation of IMR Funding

The percentage of total funding by factor is as follows:

FTEs <sup>1</sup>	Area <sup>2</sup>	Age <sup>3</sup>	Other factors such as GST <sup>4</sup>
50%	24.0%	24.0%	2.0%

<sup>1</sup>The Jurisdiction FTE Enrolment is for the most recently completed school year, based on that year’s Frozen Funded Head Count as of the last Business day of April. FTEs are determined as follows:

Grades 1 – 12 students are counted as 1.0 FTEs; ECS children are counted as 0.5 FTEs and online students are counted as 0.10 FTEs.

<sup>2</sup> The area (in square metres) of school facilities in active use for the instruction of ECS children and students in Grades 1 to 12.

<sup>3</sup> A weighted Age Factor for the jurisdiction’s school facilities.

<sup>4</sup> An amount for non-refundable GST (1.6%).

Additional details on IMR funding can be found in the *Funding Manual For School Authorities* for the current school year.

Note: P3 Schools that receive Maintenance and Renewal Funding as part of the P3 agreement are not eligible for any portion of IMR Funding.



### 13. Plant Operations and Maintenance Funding (PO&M)

PO&M funding is provided by Education to all school jurisdictions, including charter schools, for the maintenance and operation of school buildings to ensure they are safe, comfortable and suitable learning environments for children. This funding is different from the Infrastructure Maintenance and Renewal funding which is used for component replacement and the upgrading of existing school facilities.

PO&M funding details can be found in the *Funding Manual for School Authorities* at <http://www.education.alberta.ca/admin/funding/manual.aspx>.

### 14. Funding for Relocation and Program Related Upgrades

School authorities that have acquired a new facility by either lease or transfer of an existing facility from another jurisdiction may be eligible for funding, as approved by Education, to cover some costs associated with relocating to the new facility and undertaking essential work.

Requests for relocation funding should be submitted in writing to Education. Education will review costs associated with the transfer of facilities between jurisdictions, as appropriate.

To determine whether Relocation Funding will be provided, and at what level, Capital Planning will consider the following:

- cost of moving the existing furniture and equipment
- cost of purchasing necessary new furniture and equipment
- essential work required to render the space immediately usable for the incoming program, including:
  - health and safety concerns
  - technology readiness issues
  - creating required program space
- jurisdiction's commitment and capacity to contribute capital reserve funding
- estimated length of stay in facility
- facility ownership.

If the jurisdiction wishes to complete additional work beyond that required to render the space immediately usable, the additional work should be included in the jurisdiction's next Three-Year Capital Plan.

Documentation to support the request for funding and above considerations must accompany any request for relocation funding, including a floor plan outlining the proposed use of space.

Any requests for one-time modernization funding resulting from a relocation will be reviewed on a case-by-case basis. Funding will be provided based upon a review and assessment of the proposed scope of work as provided by the school jurisdiction and the host jurisdiction. In some cases, approved funding may be provided to the host jurisdiction to oversee the project.

## Appendix A: Glossary

A	
AAA	Alberta Association of Architects
ABC	Alberta Building Code
Adjusted Enrolment	The adjusted enrolment for a school uses a Student Allowance Factor to account for the additional space required by some students with special needs for the effective and safe delivery of programs. Students with severe disabilities are counted at a factor of three.
Allowable Area	Space in a school facility, supported by Infrastructure and included in the Area, Capacity and Utilization Guidelines.
Alternative Schemes of Construction	Refer to <i>School Buildings and Tendering Regulation</i>
Alternatives to Construction	Solutions for the accommodation of students that do not require the construction of school facilities. Such alternatives may include the expanded use of technology, introduction of year-round schooling, an extended school day, leased space or the sharing of facilities with other institutions.
Alternatives to Tendering Procedures	Refer to Reference 10 (1) - (3) of the - <i>School Buildings and Tendering Regulation</i> .
Ancillary Space	Instructional areas used for drama, music, arts and other multi-purposes
APEGA	Association of Professional Engineers and Geoscientists of Alberta.
Approval	"Approval" must be obtained from Education for every school building project intended by a school jurisdiction, as stipulated within the <i>School Act</i> (sections 203 and 205).
Architectural Services	Are expressed as seven phases of services as outlined in the AAA/APEGGA Schedule of Designated Services and include: Pre-design Schematic Design Design Development Construction Documents Bidding Negotiation Construction - Contract Administration Post-Construction and Supplemental Services
Area	Numerical amount of space expressed in square metres.
Area Capacity and Utilization Report (ACU)	A report from Infrastructure that provides total capacity and utilization rates for a jurisdiction and its school facilities.
Area Exemption	Refer to section 9.1
B	
Barrier Free	The Alberta Building Code defines the requirements to ensure that a school facility can accommodate people with special needs.
Base Instruction Funding	Under Education's Funding Framework the Base Instruction Funding provides for the cost of principals, teachers, instructional

	support staff, learning resources, and supplies, equipment, and furnishings used to provide instructional programs and services for students.
Best-value Selection	A procurement method whereby competitive proposals are solicited by means of a request for proposals process and a firm is selected whose proposal offers optimum value based on price as well as other considerations (e.g., experience, quality, performance, delivery time, life cycle cost, etc.).
Building Element	A major component, which is common to most buildings and serves the same function regardless of design, specification or construction.
Built-in Furniture	See Millwork
Budget	See Project Budgets
<b>C</b>	
Callable	Used in reference to cancellation of a rental lease agreement in order that a school jurisdiction may cancel a lease and therefore recover school space.
Capacity	The capacity of a new school and the method by which it is established as approved by Infrastructure. Records of capacity for all Alberta schools are maintained by Infrastructure and reflect the capacity established at the time of construction, minus any exclusions or exemptions subsequently approved by Infrastructure.
Capital Cost Guidelines	List of the maximum value of work (construction, consultants' fees, furniture and equipment, etc.) which is supported by Education and Infrastructure.
Capital Funding	Funding provided to school jurisdictions for school building projects in accordance with Education's approved budget schedule.
Capital Plan	Refer to section 3.
Certificate of Substantial Performance of Work also referred to as the Certificate of Substantial Completion	A standard certificate issued by a contractor and verified by a prime consultant to indicate that construction work is substantially complete and the building is ready for use, as per the Canadian Construction Document Committee Document 2 (CCDC 2) - 2008 Stipulated Price Contract available at <a href="http://www.ccdc.org/">http://www.ccdc.org/</a> .
Certificate of Total Performance	A standard certificate issued by a contractor and verified by a prime consultant to indicate that all work has been performed to the requirements of the construction contract documents as per CCDC 2 - 2008 Stipulated Price Contract
Code Requirements	The minimum requirements for construction defined by the <i>Alberta Building Code</i> and those standards referenced in the Code.
Composite Senior High School	A high school designed to provide students with academic, fine arts, and practical arts programs.
Conditions of Engagement	Refers to the Recommended Conditions of Engagement and Schedule of Professional Fees for Building Projects.
Construction Management Scheme	One where the school jurisdiction retains a construction management firm to manage all aspects of construction on the project.

Construction Phase	A stage in the development of the project that occurs after the construction contract has been awarded until the certificate of substantial completion has been issued.
Construction Progress Certificate	A schedule of the value of various parts of the construction work and the value completed to date as per Canadian Construction Document Committee Document 2 - 2008 Stipulated Price Contract.
Consultant	An individual or entity retained by a school jurisdiction to provide specific services during a prescribed period.
Contract Review Committee (CRC)	The committee is comprised of the Assistant Deputy Ministers of Infrastructure and reports to the Deputy Minister of Infrastructure. It ensures the department's policies and procedures governing the employment and treatment of contractors and consulting services are fair, fiscally responsible and in compliance with applicable legislative and regulatory requirements, including the Agreement on Internal Trade. The committee oversees the implementation of policies and procedures and continually assesses their effectiveness.
Contracting Activities	All processes, procedures, decisions and other activities related to the procurement, by contract, of all goods and services, including construction services, necessary to complete an infrastructure project.
Core Area	The space that is provided to meet the needs of the regular curriculum, including administrative and service areas.
Core School	A school building that is constructed with a permanent core and can be expanded or contracted by the addition or removal of modular classrooms.
Cost Consultant	An individual who has attained the professional designation of Professional Quantity Surveyor as conferred by the Canadian Institute of Quantity Surveyors (CIQS), or who has achieved the requisite equivalent level of academic and experimental achievement to be accepted as a professional member in CIQS. Cost consultant firms should have at least one Professional Quantity Surveyor acting on their behalf as a principal to be considered as viable candidates to provide cost consulting services.
CTS	Career and Technology Studies (CTS) is a complementary program designed for Alberta's secondary school students.
<b>D</b>	
Day Labour Scheme	See Own Forces
District Utilization Factor	See Utilization Rate
<b>E</b>	
ECS	Early Childhood Services programs provide services to meet the developmental needs of children before they enter Grade 1.
EIA	Educational Impact Assessment, included as part of a school jurisdiction's project funding request.
Elementary School	A facility which provides school space for grades 1 through 6 and

	Kindergarten.
ESL	English as a Second Language.
Expandable/Contractible	See Core School.
Expenditure Schedule	Schedule of projected payments and amounts to complete the project.
<b>F</b>	
Facilities Plan	A general or broad plan for facilities and facility development within a school jurisdiction.
Facility	Site, building or space within a building, which serves a number of specified space functions.
Facility Evaluation	Assessment of facility characteristics, which includes site, architectural and engineering components, maintenance planning, safety, space adequacy and environment protection, to determine the ability of the building to accommodate current and future needs.
Facility Project Plan	A specific, step-by-step plan which may be followed for an educational facility project.
Fiscal Year	The Government of Alberta fiscal year starts on April 1 and ends on March 31 of the following year.
Freestanding Portable/Modular Classroom	See Portable-freestanding.
Funded Entity	A Municipality, Post-Secondary Educational Institution, Regional Health Authority, School Jurisdiction, Seniors' Lodge, or other similar 'owner' entity that receives funding from the Alberta Government for an infrastructure project, and includes any entity that may act as agent for any of the above entities.
Funded Facility Area	That portion of a facility that is supported by Education.
Funding Payment Schedule	See Payment Schedule.
Furniture and Equipment	Includes basic furnishings including desks, seating, storage cabinets, and tables that are normally provided under a contract separate from the general construction contract.
<b>G</b>	
Gross Area	The area within the perimeter of a school building that is measured from outside to outside of the building's exterior finish.
<b>I</b>	
Infrastructure Maintenance and Renewal (IMR) program	Provides funding to (a) replace building and site components which have failed and pose health and safety problems for students and staff, (b) extend the useful life of school facilities and sites and (c) maintain the quality of the school environment.
Infrastructure Project	A project involving the design, construction, renovation, expansion, alteration, modernization, upgrading, rehabilitation, redevelopment, restoration, replacement, maintenance, repair, or demolition of a building, road, bridge, water treatment facility or other civil engineering works.

Impact Assessment	Determination of the impact, which may occur when a site is developed. The more commonly required assessments include environmental, archaeological and heritage building assessments.
Instructional Area	Those areas of a school building that are designated for purposes of instruction, examinations and other student activities where direct or indirect student-teacher interaction is maintained or scheduled. Also included are storage areas considered directly related to various instructional areas (i.e., gym storage, drama storage and science preparation areas).
Inventory of Space	A listing of a school jurisdiction's owned or leased facilities, which include facility area and usage.
<b>J</b>	
Joint Board of Practice	Refers to a joint committee of the Alberta Association of Architects and the Association of Professional Engineers, Geologists and Geophysicists of Alberta.
Junior High School	A facility which provides educational space for students in grades 7 through 9.
Jurisdictional Capacity	Represents the total enrolment capacity for a school jurisdiction.
<b>L</b>	
Legislation	Refers to <i>School Act</i> .
Life Cycle Costing	Process that examines all costs associated with a facility project for the extent of its lifetime.
Location Factor	Additional funding for construction, provided on a square metre basis, for projects that are distant from the closest major urban centre. See also Major Urban Centres.
<b>M</b>	
Major Urban Centres	Defined as Edmonton, Calgary, Red Deer, Lethbridge, Medicine Hat, Fort McMurray, Grande Prairie and Lloydminster.
Maximum Building Gross Area	The funded gross area for new construction capital projects and modular classrooms as outlined in the Gross Area and Capacity Tables in Appendix C.
Mechanical Areas	Space included in the gross area calculation for mechanical and/or electrical plant and equipment.
Middle School	A facility which provides educational space for students in grades 5 through 9.
Millwork	Built-in cabinet work or customized furnishings of wood supplied under the general construction contract including cupboards, counters, benches, shelving, mirrors, chalk and tack boards, and built in seating provided by millwork sub trades.
Modernization Project	The restoration of an entire or a portion of a school facility to improve its functional adequacy and suitability for present and future educational programs.
Modular	A building material or component developed as a standard, which can be variously fitted together or has been designed as a detachable unit fitted for a specific purpose such as a classroom or laboratory.

Modular Classroom	Prototypical portable classroom units built at a central location and transported to schools across Alberta. These units are based on specifications that ensure significantly improved heating and ventilation, soundproofing, resistance to mold, ease of serviceability and several other factors that differentiate them for the older portables that are also part of schools across the province. The Government of Alberta's goal is to eventually replace all the older portables with the prototypical Modular Classrooms.
Modular Links	A modular connecting link is the connecting corridor used when attaching modular classrooms to the permanent building. A connecting link is normally built using wood frame construction and should be no larger than is necessary to provide sufficient setback from the permanent structure to meet the Alberta Building Code requirements for fire separation.
<b>N</b>	
Needs Assessment Report	A report that outlines a jurisdiction's educational needs, conditions of building components, sketch plan(s), brief description and cost estimate of proposed project(s).
Net Jurisdictional Capacity	Total capacity rating of all schools in a school jurisdiction less any approved leases and exemptions.
New Capacity	In the event that a new construction project adjusts the capacity rating, a new capacity will be incorporated to reconcile the school jurisdiction's total capacity one year after the date of Ministerial approval of the tender or alternate to tender scheme of construction.
Non-Instructional Area	Areas of a school building that are designated for administration, general storage, staff room and staff work area, infirmary, washroom, shower and change rooms, mechanical and electrical areas, entrances, circulation areas, elevators, ramps, and exterior walls.
<b>O</b>	
Online (Virtual) Program	An Online program is a program offered by a school that is delivered electronically at a school site or off-campus, under the instruction and complete supervision of a certificated teacher of a jurisdiction or accredited private school.
On-Site Services	Services located on the school site, such as water, sewer, gas, telecommunication and electrical lines.
Own Forces Work	A construction or construction related work performed with labour provided by the funded entity's employees (or full time contracted staff) and with equipment owned or leased by the funded entity.
<b>P</b>	
Payment Schedule	The percentages of payment to school jurisdictions that will be issued by Education for the support of approved school building projects. See section 6.5, Figure 4.
Permanent Construction	An expansion project that does not include modular classrooms.
Physical Appraisal	An assessment and testing of existing facility areas, conditions, capabilities and adequacy.

Plant Operations and Maintenance Funding	Funding provided to address the costs associated with the maintenance and operation of schools to ensure they are safe, comfortable and a suitable learning environment for students.
Portable - Core	A portable physically connected to a permanent school building. May include connecting links if required by code. (See also Modular Classrooms)
Portable - Freestanding	A facility constructed for relocation from site to site and installed without physical connection to a facility of permanent construction. (See also Modular Classrooms)
Post-Occupancy Evaluation	The Post-Occupancy Evaluation process is used to assess the effectiveness of the overall facility planning strategy used in the development of a school building project.
Prime Consultant	A professional consultant or consulting firm appointed by a school jurisdiction to design and administer a capital project and to direct sub-consultants. The consultant team should consist of a minimum of an architect, structural, mechanical and electrical engineers.
Program Stage	First stage in the planning of a facility where the educational and facility requirements are defined.
Project	Capital funding provided for a project usually involves building construction but may be limited to furniture and equipment and purchase and/or development of the site.
Project Budgets	The project budget for an approved capital project that provides funds for costs such as building construction (including site development), consultant's fees, project expenses, furniture and equipment costs and non-refundable GST.
Project Implementation Schedule	A schedule of project planning, design, tender call, construction commencement and completion dates.
Project Management Scheme	The school jurisdiction retains a project management firm to manage all aspects of the project, including preliminary design, design, tender and construction.
Project Phases	Stages of project development include the program (or planning) stage, preliminary design, contract document, tender, construction and post-occupancy stages.
Property Development Branch	A branch within the Property Management Division of Infrastructure that provides professional and management services required to plan regional infrastructure, develop accommodation needs, deliver and administer building construction and tenant improvement projects on behalf of departments, boards and agencies of the Alberta Government.
<b>R</b>	
Regulations	Alberta Regulations deal with matters for which there is regulatory authority within the legislation.
Relocatable Section	A combination of one or more movable classrooms and/or related non-instructional areas that may be relocated without major dismantling and reconstruction when appended to another school building.



Right-Sizing	Reduction in capacity of an existing school to provide a more efficient use of the facility due to declining enrolments.
<b>S</b>	
Schedule of Fees	The minimum recommended percentage of fees for basic services on building projects endorsed by the Joint Board of Practice.
School Building	Means a building used for the instruction or accommodation of students that is owned or occupied by (i) a school jurisdiction, (ii) a school jurisdiction and a municipality, or (iii) a school jurisdiction and another person.
School Building Project	Means (i) the purchase, erection, relocation, renovation, furnishing or equipping of, (ii) making of structural changes in, (iii) the addition to or extension of a school building, or (iv) the building of access roads or site preparation for a school building.
School Capacity	See section 9 and Appendix C.
School Day	A day of school operation as defined within the <i>School Act</i> , section 56.
Senior High School	A facility which provides educational space for grades 10-12.
Site Development	Provision of utility services, access, location of buildings, playfields and landscaping.
Space Exemptions	The space excluded from the capacity of a school facility or from the total capacity of a school jurisdiction.
Space Function	The defined use of space within a school facility such as classroom, gymnasium and administration.
Statement of Final Costs	A statement submitted that lists all actual expenditures and funding for support costs of a school building project prior to issuance of a project's final funding payment.
Storage Space	The space provided for housing custodial supplies and equipment, textbooks and other stationery items.
Support Schedules	Schedule of financial support provided for approved projects.
<b>T</b>	
Technical Services Branch (TSB)	The branch within Infrastructure that provides a broad range of professional and technical support for the planning, design, documentation, tendering, construction, renovation, commissioning, use, operation and maintenance of government-funded facilities.
Tender Documents	Documents prepared by the consultant for the purpose of inviting bid prices for a project. Such documents may include working drawings, specifications, instructions to bidders, form of contract and general conditions of the contract.
Tender Regulations	All funded school building projects are subject to tender regulations within the <i>School Buildings and Tendering Regulation</i> .
Total Capacity	See section 9 and Appendix C
Total Project Cost (TPC)	Represents the total cost of the project including all funding sources.
Total Provincial Support	Represents the total project funding provided by the province.

(TPS)	
<b>U</b>	
Utilization Rate	The ratio determined by dividing a jurisdiction's total adjusted student enrolment by its net capacity.
<b>V</b>	
Value Analysis	Value Analysis involves an in-depth study of a project or program to determine its functions, performance, durability and reliability, and to find the least costly solution to achieve a set of predetermined requirements.
Viability Plan	A review of a school or schools to determine the long-range need for the facility or facilities.
Viable Schools	Schools that are required for the long term to accommodate students.

## Appendix B: Consultants’ Fees, Project Expenses and Furniture and Equipment Support as a Percentage of Building Construction Cost

### Expansion

Building Construction Cost (BCC)	Consultants’ Fees, Project Expenses (%)						Furniture & Equipment (%)	
	Elementary		Junior High		Senior High		Elem.	Jr./Sr.
Additions	Fee	Exp.	Fee	Exp.	Fee	Exp.		
<\$0.6 M	8.58	2.0	9.58	2.0	9.58	2.0	9.0	9.0
\$0.6 M < \$1.2 M	8.58 – 8.43	2.0	9.58 – 9.43	2.0	9.58- 9.43	2.0	9.0	9.0
\$1.2 M < \$2.5 M	8.43 – 8.15	2.0	9.43 – 9.15	2.0	9.43 – 9.15	2.0	9.0	9.0
\$2.5 M < \$5.0 M	8.15 – 7.75	2.0	9.15 – 8.75	2.0	9.15 – 8.75	2.0	9.0	9.0
\$5.0 M < \$8.5 M	7.75 – 7.37	2.0	8.75 – 8.37	2.0	8.75 – 8.37	2.0	9.0	9.0
\$8.5 M < \$12.5 M	7.37 – 7.08	2.0	8.37 – 8.08	2.0	8.37 – 8.08	2.0	9.0	9.0
\$12.5 M < \$25.0 M	7.08 – 6.61	2.0	8.08 – 7.61	2.0	8.08 – 7.61	2.0	9.0	9.0
\$25.0 M < \$35.0 M	6.61 – 6.42	2.0	7.61 – 7.42	2.0	7.61 – 7.42	2.0	9.0	9.0
> \$35.0 M	6.42 (-)	2.0	7.42 (-)	2.0	7.42 (-)	2.0	9.0	9.0
New Schools	Same as above						9.0	9.0
Replacement Schools	Same as above						7.0	7.0

### Preservation

Building Construction Cost (BCC)	Consultants’ Fees, Project Expenses (%)						Furniture & Equip. (%)	
	Elementary		Junior High		Senior High		Elem.	Jr./Sr.
	Fee	Exp.	Fee	Exp.	Fee	Exp.		
<\$0.6 M	12.58	2.0	12.58	2.0	12.58	2.0	4.5	4.5
\$0.6 M < \$1.2 M	12.58 – 12.43	2.0	12.58 – 12.43	2.0	12.58 – 12.43	2.0	4.5	4.5
\$1.2 M < \$2.5 M	12.43 – 12.15	2.0	12.43 – 12.15	2.0	12.43 – 12.15	2.0	4.5	4.5
\$2.5 M < \$5.0 M	12.15 – 11.75	2.0	12.15 – 11.75	2.0	12.15 – 11.75	2.0	4.5	4.5
\$5.0 M < \$8.5 M	11.75 – 11.37	2.0	11.75 – 11.37	2.0	11.75 – 11.37	2.0	4.5	4.5
\$8.5 M < \$12.5 M	11.37 – 11.08	2.0	11.37 – 11.08	2.0	11.37 – 11.08	2.0	4.5	4.5
\$12.5 M < \$25.0 M	11.08 – 10.61	2.0	11.08 – 10.61	2.0	11.08 – 10.61	2.0	4.5	4.5
\$25.0 M < \$35.0 M	10.61 – 10.42	2.0	10.61 – 10.42	2.0	10.61 – 10.42	2.0	4.5	4.5

### Cost Consulting Fees

All Project Types

\$1.0 M < \$2.5 M

\$2.5 M < \$5.0 M

\$5.0 M < \$10.0 M

Fee Schedule (inclusive of six phases as per below)

Inclusive hourly rates to a maximum upset of \$20,000

\$20,000 + 0.6% on amounts over \$2.5 million

\$35,000 + 0.5% on amounts over \$5 million

\$10.0 M < \$25.0 M      \$60,000 + 0.4% on amounts over \$10 million

The Cost Consulting Fee may be allowed as follows:

Project Phase	Report	Amount
Functional Program	Feasibility Study	5.00%
Block Schematics	Design Selection Studies	7.50%
Selected Sketch Design	Schematic Design Cost Plan	12.50%
Design Development	Design Development Cost Check	20.00%
Construction Documents	Cost checks, Pre-tender estimate, tender analysis	55.00%

Note: Support for the non-refundable component of GST is also funded to school jurisdictions.

## Appendix C: Education Design Standards

Following are instruction and non-instruction areas and Area per Student by capacity for the following Grade Structures:

- Elementary School - K – Grade 6
- Junior High School – grades 7 – 9
- Senior High School – grades 10 – 12
- K – grade 12 School
- K – grade 9 School (50% Elementary/50% Junior High)
- Middle School - grades 5 – 9
- Grades 9 – 12 School
- Junior/Senior High School – Grades 7 – 12 (50% Junior High/50% Senior High)

The Revised Education Design Standards Tables

## Education Design Standards

### ELEMENTARY SCHOOL (K to 6)

ELEMENTARY SCHOOL (K to 6)																							
INSTRUCTIONAL AREA									NON-INSTRUCTIONAL AREA														
Capacity	Cr.	Sci	Anc	Anc	Gym	Gym Stor.	Library	Total Inst. Area	Admin. & Staff	Wrap Around & Collaboration Space	Mechanical & Meter Rooms	Recycle Room (LEED)	Phys. Educ.	Circ.	Wall Area	Storage Area	Washrms Area	Accessible Washroom Facility	Flexible Space	Wiring Network	Total Non-area	Gross Area	Area per Student
200	(4 @ 80)	(1 @ 95)	(1 @ 130)	(2 @ 90)																			
	320	95	130	180	430	43	80	1,278	150	20	108	11	50	320	153	45	24	12	48	30	971	2,249	11.24
250	(6 @ 80)	(1 @ 95)	(1 @ 130)	(2 @ 90)																			
	480	95	130	180	430	43	100	1,458	227	20	108	11	50	365	175	51	30	12	60	30	1,138	2,596	10.39
300	(8 @ 80)	(1 @ 95)	(1 @ 130)	(2 @ 90)																			
	640	95	130	180	430	43	120	1,638	227	20	108	11	50	410	197	57	36	12	72	30	1,229	2,867	9.56
350	(10 @ 80)	(1 @ 95)	(1 @ 130)	(2 @ 90)																			
	800	95	130	180	430	43	140	1,818	227	20	108	11	70	455	218	64	42	12	84	30	1,340	3,158	9.02
400	(11 @ 80)	(2 @ 95)	(1 @ 130)	(2 @ 90)																			
	880	190	130	180	430	43	160	2,013	227	20	108	11	70	503	242	70	48	12	96	30	1,437	3,450	8.63
450	(12 @ 80)	(2 @ 95)	(1 @ 130)	(3 @ 90)																			
	960	190	130	270	430	43	180	2,203	307	30	162	11	70	551	264	77	54	12	108	30	1,676	3,879	8.62
500	(14 @ 80)	(2 @ 95)	(1 @ 130)	(3 @ 90)																			
	1120	190	130	270	430	43	200	2,383	307	30	162	11	70	596	286	83	60	12	120	30	1,767	4,150	8.30
550	(16 @ 80)	(2 @ 95)	(1 @ 130)	(3 @ 90)																			
	1280	190	130	270	430	43	220	2,563	307	30	162	11	70	641	308	90	66	12	132	30	1,858	4,421	8.04
600	(17 @ 80)	(3 @ 95)	(1 @ 130)	(3 @ 90)																			
	1360	285	130	270	430	43	240	2,758	307	30	162	11	70	690	331	97	72	12	144	30	1,955	4,713	7.85
650	(18 @ 80)	(3 @ 95)	(2 @ 130)	(3 @ 90)																			
	1440	285	260	270	595	60	260	3,170	397	40	189	11	95	792	380	111	78	24	156	30	2,304	5,473	8.42
700	(20 @ 80)	(3 @ 95)	(2 @ 130)	(3 @ 90)																			
	1600	285	260	270	595	60	280	3,350	397	40	189	11	95	837	402	117	84	24	168	30	2,395	5,744	8.21
750	(22 @ 80)	(3 @ 95)	(2 @ 130)	(3 @ 90)																			
	1760	285	260	270	595	60	300	3,530	397	40	189	11	95	882	424	124	90	24	180	30	2,485	6,015	8.02
800	(23 @ 80)	(4 @ 95)	(2 @ 130)	(3 @ 90)																			
	1840	380	260	270	595	60	320	3,725	397	40	189	22	95	931	447	130	96	24	192	30	2,593	6,318	7.90
850	(24 @ 80)	(4 @ 95)	(2 @ 130)	(4 @ 90)																			
	1920	380	260	360	595	60	340	3,915	472	50	216	22	95	979	470	137	102	24	204	30	2,800	6,715	7.90
900	(26 @ 80)	(4 @ 95)	(2 @ 130)	(4 @ 90)																			
	2080	380	260	360	595	60	360	4,095	472	50	216	22	95	1,024	491	143	108	24	216	30	2,891	6,986	7.76

## Education Design Standards

### JUNIOR HIGH SCHOOL (7 to 9)

INSTRUCTIONAL AREA										NON-INSTRUCTIONAL AREA										Total	Gross	Area per		
Capacity	Cr.	Sci	Anc	Anc	Inform. Services	Gym	Stor.	Library	Inst. Area	Admin. & Staff	Wrap Around & Collaboration Space	Mechanical & Meter Rooms	Recycle Room (LEED)	Phys. Educ.	Circ.	Wall Area	Storage Area	Washrms Area	Accessible Washroom Facility	Flexible Space	Wiring Network	Non-area	Area	Student
200	(4 @ 80) 320	(1 @ 120) 120	(1 @ 130) 130	(1 @ 90) 90	(1 @ 115) 115	430	43	80	1,328	150	20	108	11	100	332	159	46	24	12	48	40	1,051	2,379	11.89
250	(5 @ 80) 400	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	430	43	100	1,518	227	20	108	11	100	380	182	53	30	12	60	40	1,223	2,741	10.96
300	(7 @ 80) 560	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	430	43	120	1,698	227	20	108	11	100	425	204	59	36	12	72	40	1,314	3,012	10.04
350	(9 @ 80) 720	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	595	60	140	2,060	227	20	108	11	130	515	247	72	42	12	84	40	1,508	3,568	10.19
400	(9 @ 80) 720	(2 @ 120) 240	(1 @ 130) 130	(2 @ 90) 180	(2 @ 115) 230	595	60	160	2,315	227	20	162	11	130	579	278	81	48	12	96	40	1,683	3,998	9.99
450	(10 @ 80) 800	(2 @ 120) 240	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	595	60	180	2,505	307	30	162	11	130	626	301	88	54	12	108	40	1,868	4,373	9.72
500	(12 @ 80) 960	(2 @ 120) 240	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	595	60	200	2,685	307	30	162	11	130	671	322	94	60	12	120	40	1,959	4,644	9.29
550	(14 @ 80) 1120	(2 @ 120) 240	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	595	60	220	2,865	307	30	162	11	130	716	344	100	66	12	132	40	2,050	4,915	8.94
600	(15 @ 80) 1200	(3 @ 120) 360	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	595	60	240	3,085	307	30	189	11	130	771	370	108	72	12	144	40	2,184	5,269	8.78
650	(16 @ 80) 1280	(3 @ 120) 360	(2 @ 130) 260	(3 @ 90) 270	(2 @ 115) 230	815	82	260	3,557	397	40	189	11	160	889	427	124	78	24	156	40	2,535	6,092	9.37
700	(17 @ 80) 1360	(3 @ 120) 360	(2 @ 130) 260	(3 @ 90) 270	(3 @ 115) 345	815	82	280	3,772	397	40	189	11	160	943	453	132	84	24	168	40	2,640	6,412	9.16
750	(19 @ 80) 1520	(3 @ 120) 360	(2 @ 130) 260	(3 @ 90) 270	(3 @ 115) 345	815	82	300	3,952	397	40	189	11	160	988	474	138	90	24	180	40	2,731	6,683	8.91
800	(20 @ 80) 1600	(4 @ 120) 480	(2 @ 130) 260	(3 @ 90) 270	(3 @ 115) 345	815	82	320	4,172	397	40	216	22	160	1,043	501	146	96	24	192	40	2,876	7,048	8.81
850	(21 @ 80) 1680	(4 @ 120) 480	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	815	82	340	4,362	472	50	216	22	160	1,090	523	153	102	24	204	40	3,056	7,418	8.73
900	(23 @ 80) 1840	(4 @ 120) 480	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	815	82	360	4,542	472	50	216	22	160	1,135	545	159	108	24	216	40	3,147	7,689	8.54
950	(25 @ 80) 2000	(4 @ 120) 480	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	1060	106	380	4,991	472	50	216	22	200	1,248	599	175	114	24	228	40	3,387	8,378	8.82
1000	(25 @ 80) 2000	(5 @ 120) 600	(2 @ 130) 260	(4 @ 90) 360	(4 @ 115) 460	1060	106	400	5,246	472	50	270	22	200	1,312	630	184	120	24	240	40	3,563	8,809	8.81
1100	(29 @ 80) 2320	(5 @ 120) 600	(2 @ 130) 260	(4 @ 90) 360	(4 @ 115) 460	1060	106	440	5,606	547	60	270	22	200	1,402	673	196	132	24	264	40	3,829	9,435	8.58
1200	(31 @ 80) 2480	(6 @ 120) 720	(2 @ 130) 260	(5 @ 90) 450	(4 @ 115) 460	1060	106	480	6,016	547	60	297	22	200	1,504	722	211	144	24	288	40	4,058	10,074	8.40

**Education Design Standards  
SENIOR HIGH SCHOOL (10 to 12)**

Capacity	INSTRUCTIONAL AREA									NON-INSTRUCTIONAL AREA										Total Non-area	Gross Area	Area per Student		
	Cr.	Sci	Anc	Anc	Inform. Services	Gym	Gym Stor.	Library	Total Inst. Area	Admin. & Staff	Wrap Around & Collaboration Space	Mechanical & Meter Rooms	Recycle Room (LEED)	Phys. Educ.	Circ.	Wall Area	Storage Area	Washrms Area	Accessible Washroom Facility				Flexible Space	Wiring Network
200	(4 @ 80) 320	(1 @ 120) 120	(1 @ 130) 130	(1 @ 90) 90	(1 @ 115) 115				1,470	150	20	108	11	110	368	176	51	24	12	48	45	1,123	2,593	12.97
250	(5 @ 80) 400	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115				1,663	227	20	108	11	110	416	200	58	30	12	60	45	1,297	2,960	11.84
300	(7 @ 80) 560	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115				1,845	227	20	108	11	110	461	221	65	36	12	72	45	1,388	3,233	10.78
350	(9 @ 80) 720	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115				2,182	227	20	108	11	145	546	262	76	42	12	84	45	1,578	3,760	10.74
400	(9 @ 80) 720	(2 @ 120) 240	(1 @ 130) 130	(2 @ 90) 180	(2 @ 115) 230				2,439	227	20	162	11	145	610	293	85	48	12	96	45	1,754	4,193	10.48
450	(10 @ 80) 800	(2 @ 120) 240	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230				2,632	307	30	162	11	145	658	316	92	54	12	108	45	1,940	4,572	10.16
500	(12 @ 80) 960	(2 @ 120) 240	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230				2,814	307	30	162	11	145	704	338	98	60	12	120	45	2,032	4,846	9.69
550	(14 @ 80) 1120	(2 @ 120) 240	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230				2,997	307	30	162	11	145	749	360	105	66	12	132	45	2,124	5,121	9.31
600	(15 @ 80) 1200	(3 @ 120) 360	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230				3,219	307	30	189	11	145	805	386	113	72	12	144	45	2,259	5,478	9.13
650	(16 @ 80) 1280	(3 @ 120) 360	(2 @ 130) 260	(3 @ 90) 270	(2 @ 115) 230				3,848	397	40	189	11	180	962	462	135	78	24	156	45	2,678	6,526	10.04
700	(17 @ 80) 1360	(3 @ 120) 360	(2 @ 130) 260	(3 @ 90) 270	(3 @ 115) 345				4,065	397	40	189	11	180	1,016	488	142	84	24	168	45	2,784	6,849	9.78
750	(19 @ 80) 1520	(3 @ 120) 360	(2 @ 130) 260	(3 @ 90) 270	(3 @ 115) 345				4,248	397	40	189	11	180	1,062	510	149	90	24	180	45	2,876	7,124	9.50
800	(20 @ 80) 1600	(4 @ 120) 480	(2 @ 130) 260	(3 @ 90) 270	(3 @ 115) 345				4,470	397	40	216	22	180	1,118	536	156	96	24	192	45	3,022	7,492	9.37
850	(21 @ 80) 1680	(4 @ 120) 480	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345				4,663	472	50	216	22	180	1,166	560	163	102	24	204	45	3,204	7,867	9.25
900	(23 @ 80) 1840	(4 @ 120) 480	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345				4,845	472	50	216	22	180	1,211	581	170	108	24	216	45	3,295	8,140	9.04
950	(25 @ 80) 2000	(4 @ 120) 480	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345				5,331	472	50	216	22	240	1,333	640	187	114	24	228	45	3,570	8,900	9.37
1000	(25 @ 80) 2000	(5 @ 120) 600	(2 @ 130) 260	(4 @ 90) 360	(4 @ 115) 460				5,588	472	50	270	22	240	1,397	671	196	120	24	240	45	3,746	9,333	9.33
1100	(29 @ 80) 2320	(5 @ 120) 600	(2 @ 130) 260	(4 @ 90) 360	(4 @ 115) 460				5,953	547	60	270	22	240	1,488	714	208	132	24	264	45	4,015	9,967	9.06
1200	(31 @ 80) 2480	(6 @ 120) 720	(2 @ 130) 260	(5 @ 90) 450	(4 @ 115) 460				6,368	547	60	297	22	240	1,592	764	223	144	24	288	45	4,246	10,613	8.84
1300	(34 @ 80) 2720	(6 @ 120) 720	(2 @ 130) 260	(5 @ 90) 450	(5 @ 115) 575				6,768	620	70	297	22	290	1,692	812	237	156	24	312	45	4,577	11,344	8.73
1400	(36 @ 80) 2880	(7 @ 120) 840	(2 @ 130) 260	(6 @ 90) 540	(5 @ 115) 575				7,183	620	70	324	22	290	1,796	862	251	168	24	336	45	4,808	11,990	8.56
1500	(40 @ 80) 3200	(7 @ 120) 840	(2 @ 130) 260	(6 @ 90) 540	(5 @ 115) 575				7,548	705	80	324	22	290	1,887	906	264	180	24	360	45	5,087	12,634	8.42
1600	(41 @ 80) 3280	(8 @ 120) 960	(2 @ 130) 260	(7 @ 90) 630	(6 @ 115) 690				8,383	705	80	351	22	350	2,096	1,006	293	192	24	384	45	5,548	13,930	8.71
1700	(45 @ 80) 3600	(8 @ 120) 960	(2 @ 130) 260	(7 @ 90) 630	(6 @ 115) 690				8,748	780	90	351	22	350	2,187	1,050	306	204	24	408	45	5,817	14,564	8.57



Education Design Standards  
SENIOR HIGH SCHOOL (10 to 12)

INSTRUCTIONAL AREA										NON-INSTRUCTIONAL AREA														
Capacity	Cr.	Sci	Anc	Anc	Inform. Services	Gym	Gym Stor.	Library	Total Inst. Area	Admin. & Staff	Wrap Around & Collaboration Space	Mechanical & Meter Rooms	Recycle Room (LEED)	Phys. Educ.	Circ.	Wall Area	Storage Area	Washrms Area	Accessible Washroom Facility	Flexible Space	Wiring Network	Total Non-area	Gross Area	Area per Student
1800	(47 @ 80)	(9 @ 120)	(2 @ 130)	(8 @ 90)	(6 @ 115)																			
	3760	1080	260	720	690	1675	168	810	9,163	780	90	378	22	350	2,291	1,100	321	216	24	432	45	6,048	15,210	8.45
1900	(50 @ 80)	(9 @ 120)	(2 @ 130)	(8 @ 90)	(7 @ 115)																			
	4000	1080	260	720	805	1675	168	855	9,563	823	100	378	22	350	2,391	1,148	335	228	24	456	45	6,299	15,861	8.35
2000	(52 @ 80)	(10 @ 120)	(2 @ 130)	(9 @ 90)	(7 @ 115)																			
	4160	1200	260	810	805	2025	203	900	10,363	823	100	405	22	400	2,591	1,244	363	240	24	480	45	6,736	17,098	8.55
2100	(56 @ 80)	(10 @ 120)	(2 @ 130)	(9 @ 90)	(7 @ 115)																			
	4480	1200	260	810	805	2025	203	945	10,728	888	110	405	22	400	2,682	1,287	375	252	24	504	45	6,995	17,722	8.44
2200	(57 @ 80)	(11 @ 120)	(2 @ 130)	(10 @ 90)	(8 @ 115)																			
	4560	1320	260	900	920	2025	203	990	11,178	888	110	432	22	400	2,794	1,341	391	264	24	528	45	7,240	18,417	8.37
2300	(61 @ 80)	(11 @ 120)	(2 @ 130)	(10 @ 90)	(8 @ 115)																			
	4880	1320	260	900	920	2025	203	1035	11,543	963	120	432	22	460	2,886	1,385	404	276	24	552	45	7,569	19,111	8.31
2400	(63 @ 80)	(12 @ 120)	(2 @ 130)	(11 @ 90)	(8 @ 115)																			
	5040	1440	260	990	920	2375	238	1080	12,343	963	120	459	22	460	3,086	1,481	432	288	24	576	45	7,956	20,298	8.46
2500	(66 @ 80)	(12 @ 120)	(2 @ 130)	(11 @ 90)	(9 @ 115)																			
	5280	1440	260	990	1035	2375	238	1125	12,743	943	130	459	22	460	3,186	1,529	446	300	24	600	45	8,144	20,886	8.35
2600	(68 @ 80)	(13 @ 120)	(2 @ 130)	(12 @ 90)	(9 @ 115)																			
	5440	1560	260	1080	1035	2375	238	1170	13,158	1010	130	486	22	500	3,289	1,579	461	312	24	624	45	8,482	21,639	8.32
2700	(72 @ 80)	(13 @ 120)	(2 @ 130)	(12 @ 90)	(9 @ 115)																			
	5760	1560	260	1080	1035	2375	238	1215	13,523	990	140	486	22	500	3,381	1,623	473	324	24	648	45	8,656	22,178	8.21
2800	(73 @ 80)	(14 @ 120)	(2 @ 130)	(13 @ 90)	(10 @ 115)																			
	5840	1680	260	1170	1150	2725	273	1260	14,358	990	140	513	22	500	3,589	1,723	503	336	24	672	45	9,057	23,414	8.36
2900	(77 @ 80)	(14 @ 120)	(2 @ 130)	(13 @ 90)	(10 @ 115)																			
	6160	1680	260	1170	1150	2725	273	1305	14,723	1070	150	513	22	550	3,681	1,767	515	348	24	696	45	9,381	24,103	8.31
3000	(79 @ 80)	(15 @ 120)	(2 @ 130)	(14 @ 90)	(10 @ 115)																			
	6320	1800	260	1260	1150	2725	273	1350	15,138	1070	150	540	22	550	3,784	1,817	530	360	24	720	45	9,612	24,749	8.25
3100	(82 @ 80)	(15 @ 120)	(2 @ 130)	(14 @ 90)	(11 @ 115)																			
	6560	1800	260	1260	1265	2725	273	1395	15,538	1050	160	540	22	550	3,884	1,865	544	372	24	744	45	9,800	25,337	8.17

Education Design Standards  
ELEMENTARY/JUNIOR/SENIOR HIGH (K to 12)

INSTRUCTIONAL AREA										NON-INSTRUCTIONAL AREA															
Capacity	Cr.	Sci	Anc	Anc	Inform. Services	Gym	Stor.	Library	Inst. Area	Total	Admin. & Staff	Wrap Around	Mechanical	Recycle	Phys. Educ.	Circ.	Wall Area	Storage Area	Washrms Area	Accessible	Flexible Space	Wiring Network	Total Non-area	Gross Area	Area per Student
												& Collaboration Space	& Meter Rooms	Room (LEED)						Washroom Facility					
200	(4 @ 80) 320	(1 @ 120) 120	(1 @ 130) 130	(1 @ 90) 90	(1 @ 115) 115	430	43	80	1,328		150	20	108	11	100	332	159	46	24	12	48	40	1,051	2,379	11.89
250	(5 @ 80) 400	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	430	43	100	1,518		227	20	108	11	100	380	182	53	30	12	60	40	1,223	2,741	10.96
300	(7 @ 80) 560	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	430	43	120	1,698		227	20	108	11	100	425	204	59	36	12	72	40	1,314	3,012	10.04
350	(9 @ 80) 720	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	595	60	140	2,060		227	20	108	11	130	515	247	72	42	12	84	40	1,508	3,568	10.19
400	(9 @ 80) 720	(2 @ 120) 240	(1 @ 130) 130	(2 @ 90) 180	(2 @ 115) 230	595	60	160	2,315		227	20	162	11	130	579	278	81	48	12	96	40	1,683	3,998	9.99
450	(10 @ 80) 800	(2 @ 120) 240	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	595	60	180	2,505		307	30	162	11	130	626	301	88	54	12	108	40	1,868	4,373	9.72
500	(12 @ 80) 960	(2 @ 120) 240	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	595	60	200	2,685		307	30	162	11	130	671	322	94	60	12	120	40	1,959	4,644	9.29
550	(14 @ 80) 1120	(2 @ 120) 240	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	595	60	220	2,865		307	30	162	11	130	716	344	100	66	12	132	40	2,050	4,915	8.94
600	(15 @ 80) 1200	(3 @ 120) 360	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	595	60	240	3,085		307	30	189	11	130	771	370	108	72	12	144	40	2,184	5,269	8.78
650	(16 @ 80) 1280	(3 @ 120) 360	(2 @ 130) 260	(3 @ 90) 270	(2 @ 115) 230	815	82	260	3,557		397	40	189	11	160	889	427	124	78	24	156	40	2,535	6,092	9.37
700	(17 @ 80) 1360	(3 @ 120) 360	(2 @ 130) 260	(3 @ 90) 270	(3 @ 115) 345	815	82	280	3,772		397	40	189	11	160	943	453	132	84	24	168	40	2,640	6,412	9.16
750	(19 @ 80) 1520	(3 @ 120) 360	(2 @ 130) 260	(3 @ 90) 270	(3 @ 115) 345	815	82	300	3,952		397	40	189	11	160	988	474	138	90	24	180	40	2,731	6,683	8.91
800	(20 @ 80) 1600	(4 @ 120) 480	(2 @ 130) 260	(3 @ 90) 270	(3 @ 115) 345	815	82	320	4,172		397	40	216	22	160	1,043	501	146	96	24	192	40	2,876	7,048	8.81
850	(21 @ 80) 1680	(4 @ 120) 480	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	815	82	340	4,362		472	50	216	22	160	1,090	523	153	102	24	204	40	3,056	7,418	8.73
900	(23 @ 80) 1840	(4 @ 120) 480	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	815	82	360	4,542		472	50	216	22	160	1,135	545	159	108	24	216	40	3,147	7,689	8.54
950	(25 @ 80) 2000	(4 @ 120) 480	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	1060	106	380	4,991		472	50	216	22	200	1,248	599	175	114	24	228	40	3,387	8,378	8.82
1000	(25 @ 80) 2000	(5 @ 120) 600	(2 @ 130) 260	(4 @ 90) 360	(4 @ 115) 460	1060	106	400	5,246		472	50	270	22	200	1,312	630	184	120	24	240	40	3,563	8,809	8.81
1100	(29 @ 80) 2320	(5 @ 120) 600	(2 @ 130) 260	(4 @ 90) 360	(4 @ 115) 460	1060	106	440	5,606		547	60	270	22	200	1,402	673	196	132	24	264	40	3,829	9,435	8.58
1200	(31 @ 80) 2480	(6 @ 120) 720	(2 @ 130) 260	(5 @ 90) 450	(4 @ 115) 460	1060	106	480	6,016		547	60	297	22	200	1,504	722	211	144	24	288	40	4,058	10,074	8.40

## Education Design Standards

### ELEMENTARY/JUNIOR HIGH (K to 9)

Capacity	INSTRUCTIONAL AREA										NON-INSTRUCTIONAL AREA										Total Non-area	Gross Area	Area per Student		
	Cr.	Sci	Elem.		Inform. Services	Gym	Gym Stor.	Library	Total Inst. Area	Admin. & Staff	Wrap Around & Collaboration Space	Mechanical & Meter Rooms	Recycle Room (LEED)	Phys. Educ.	Circ.	Wall Area	Storage Area	Washrms Area	Accessible Washroom Facility	Flexible Space				Wiring Network	
			Sci	Anc																					Anc
200	(4 @ 80) 320	(1 @ 120) 120	(1 @ 130) 130	(1 @ 90) 90	(1 @ 115) 115	430	43	80	1,328	150	20	108	11	75	332	159	46	24	12	48	40	1,026	2,354	11.77	
250	(5 @ 80) 400	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	430	43	100	1,518	227	20	108	11	75	380	182	53	30	12	60	40	1,198	2,716	10.86	
300	(7 @ 80) 560	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	430	43	120	1,698	227	20	108	11	75	425	204	59	36	12	72	40	1,289	2,987	9.96	
350	(9 @ 80) 720	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	515	52	140	1,972	227	20	108	11	100	493	237	69	42	12	84	40	1,442	3,414	9.75	
400	(10 @ 80) 800	(1 @ 120) 120	(1 @ 95) 95	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	515	52	160	2,167	227	20	162	11	100	542	260	76	48	12	96	40	1,593	3,760	9.40
450	(11 @ 80) 880	(1 @ 120) 120	(1 @ 95) 95	(1 @ 130) 130	(3 @ 90) 270	(1 @ 115) 115	515	52	180	2,357	307	30	162	11	100	589	283	82	54	12	108	40	1,778	4,135	9.19
500	(13 @ 80) 1040	(1 @ 120) 120	(1 @ 95) 95	(1 @ 130) 130	(3 @ 90) 270	(1 @ 115) 115	515	52	200	2,537	307	30	162	11	100	634	304	89	60	12	120	40	1,869	4,406	8.81
550	(15 @ 80) 1200	(1 @ 120) 120	(1 @ 95) 95	(1 @ 130) 130	(3 @ 90) 270	(1 @ 115) 115	515	52	220	2,717	307	30	162	11	100	679	326	95	66	12	132	40	1,960	4,677	8.50
600	(16 @ 80) 1280	(2 @ 120) 240	(1 @ 95) 95	(1 @ 130) 130	(3 @ 90) 270	(1 @ 115) 115	515	52	240	2,937	307	30	189	11	100	734	352	103	72	12	144	40	2,094	5,031	8.38
650	(16 @ 80) 1280	(2 @ 120) 240	(1 @ 95) 95	(2 @ 130) 260	(3 @ 90) 270	(2 @ 115) 230	705	71	260	3,411	397	40	189	11	130	853	409	119	78	24	156	40	2,446	5,857	9.01
700	(18 @ 80) 1440	(2 @ 120) 240	(1 @ 95) 95	(2 @ 130) 260	(3 @ 90) 270	(2 @ 115) 230	705	71	280	3,591	397	40	189	11	130	898	431	126	84	24	168	40	2,537	6,128	8.75
750	(20 @ 80) 1600	(2 @ 120) 240	(1 @ 95) 95	(2 @ 130) 260	(3 @ 90) 270	(2 @ 115) 230	705	71	300	3,771	397	40	189	11	130	943	452	132	90	24	180	40	2,628	6,399	8.53
800	(21 @ 80) 1680	(2 @ 120) 240	(2 @ 95) 190	(2 @ 130) 260	(3 @ 90) 270	(2 @ 115) 230	705	71	320	3,966	397	40	216	22	130	991	476	139	96	24	192	40	2,763	6,729	8.41
850	(22 @ 80) 1760	(2 @ 120) 240	(2 @ 95) 190	(2 @ 130) 260	(4 @ 90) 360	(2 @ 115) 230	705	71	340	4,156	472	50	216	22	130	1,039	499	145	102	24	204	40	2,943	7,098	8.35
900	(24 @ 80) 1920	(2 @ 120) 240	(2 @ 95) 190	(2 @ 130) 260	(4 @ 90) 360	(2 @ 115) 230	705	71	360	4,336	472	50	216	22	130	1,084	520	152	108	24	216	40	3,034	7,369	8.19
950	(26 @ 80) 2080	(2 @ 120) 240	(2 @ 95) 190	(2 @ 130) 260	(4 @ 90) 360	(2 @ 115) 230	940	94	380	4,774	472	50	216	22	165	1,194	573	167	114	24	228	40	3,264	8,038	8.46
1000	(26 @ 80) 2080	(3 @ 120) 360	(2 @ 95) 190	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	940	94	400	5,029	472	50	270	22	165	1,257	603	176	120	24	240	40	3,440	8,469	8.47
1100	(30 @ 80) 2400	(3 @ 120) 360	(2 @ 95) 190	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	940	94	440	5,389	547	60	270	22	165	1,347	647	189	132	24	264	40	3,707	9,096	8.27
1200	(32 @ 80) 2560	(3 @ 120) 360	(3 @ 95) 285	(2 @ 130) 260	(5 @ 90) 450	(3 @ 115) 345	940	94	480	5,774	547	60	297	22	165	1,444	693	202	144	24	288	40	3,925	9,699	8.08

## Education Design Standards

### 5 to 9 SCHOOL

Capacity	INSTRUCTIONAL AREA									NON-INSTRUCTIONAL AREA											Total Non-area	Gross Area	Area per Student															
	Cr.	Sci	Anc	Anc	Inform. Services	Gym	Gym Stor.	Library	Total Inst. Area	Admin. & Staff	Wrap Around & Collaboration Space	Mechanical & Meter Rooms	Recycle Room (LEED)	Phys. Educ.	Circ.	Wall Area	Storage Area	Washrms Area	Accessible Washroom Facility	Flexible Space				Wiring Network														
																									Total	Phys.	Wall	Storage	Washrms	Accessible Washroom	Flexible Space	Wiring Network						
200	(4 @ 80)	(1 @ 120)	(1 @ 130)	(1 @ 90)	(1 @ 115)																																	
	320	120	130	90	115	430	43	80	1,328	150	20	108	11	100	332	159	46	24	12	48	40	1,051	2,379	11.89														
250	(5 @ 80)	(1 @ 120)	(1 @ 130)	(2 @ 90)	(1 @ 115)																																	
	400	120	130	180	115	430	43	100	1,518	227	20	108	11	100	380	182	53	30	12	60	40	1,223	2,741	10.96														
300	(7 @ 80)	(1 @ 120)	(1 @ 130)	(2 @ 90)	(1 @ 115)																																	
	560	120	130	180	115	430	43	120	1,698	227	20	108	11	100	425	204	59	36	12	72	40	1,314	3,012	10.04														
350	(9 @ 80)	(1 @ 120)	(1 @ 130)	(2 @ 90)	(1 @ 115)																																	
	720	120	130	180	115	595	60	140	2,060	227	20	108	11	130	515	247	72	42	12	84	40	1,508	3,568	10.19														
400	(9 @ 80)	(2 @ 120)	(1 @ 130)	(2 @ 90)	(2 @ 115)																																	
	720	240	130	180	230	595	60	160	2,315	227	20	162	11	130	579	278	81	48	12	96	40	1,683	3,998	9.99														
450	(10 @ 80)	(2 @ 120)	(1 @ 130)	(3 @ 90)	(2 @ 115)																																	
	800	240	130	270	230	595	60	180	2,505	307	30	162	11	130	626	301	88	54	12	108	40	1,868	4,373	9.72														
500	(12 @ 80)	(2 @ 120)	(1 @ 130)	(3 @ 90)	(2 @ 115)																																	
	960	240	130	270	230	595	60	200	2,685	307	30	162	11	130	671	322	94	60	12	120	40	1,959	4,644	9.29														
550	(14 @ 80)	(2 @ 120)	(1 @ 130)	(3 @ 90)	(2 @ 115)																																	
	1120	240	130	270	230	595	60	220	2,865	307	30	162	11	130	716	344	100	66	12	132	40	2,050	4,915	8.94														
600	(15 @ 80)	(3 @ 120)	(1 @ 130)	(3 @ 90)	(2 @ 115)																																	
	1200	360	130	270	230	595	60	240	3,085	307	30	189	11	130	771	370	108	72	12	144	40	2,184	5,269	8.78														
650	(16 @ 80)	(3 @ 120)	(2 @ 130)	(3 @ 90)	(2 @ 115)																																	
	1280	360	260	270	230	815	82	260	3,557	397	40	189	11	160	889	427	124	78	24	156	40	2,535	6,092	9.37														
700	(17 @ 80)	(3 @ 120)	(2 @ 130)	(3 @ 90)	(3 @ 115)																																	
	1360	360	260	270	345	815	82	280	3,772	397	40	189	11	160	943	453	132	84	24	168	40	2,640	6,412	9.16														
750	(19 @ 80)	(3 @ 120)	(2 @ 130)	(3 @ 90)	(3 @ 115)																																	
	1520	360	260	270	345	815	82	300	3,952	397	40	189	11	160	988	474	138	90	24	180	40	2,731	6,683	8.91														
800	(20 @ 80)	(4 @ 120)	(2 @ 130)	(3 @ 90)	(3 @ 115)																																	
	1600	480	260	270	345	815	82	320	4,172	397	40	216	22	160	1,043	501	146	96	24	192	40	2,876	7,048	8.81														
850	(21 @ 80)	(4 @ 120)	(2 @ 130)	(4 @ 90)	(3 @ 115)																																	
	1680	480	260	360	345	815	82	340	4,362	472	50	216	22	160	1,090	523	153	102	24	204	40	3,056	7,418	8.73														
900	(23 @ 80)	(4 @ 120)	(2 @ 130)	(4 @ 90)	(3 @ 115)																																	
	1840	480	260	360	345	815	82	360	4,542	472	50	216	22	160	1,135	545	159	108	24	216	40	3,147	7,689	8.54														
950	(25 @ 80)	(4 @ 120)	(2 @ 130)	(4 @ 90)	(3 @ 115)																																	
	2000	480	260	360	345	1060	106	380	4,991	472	50	216	22	200	1,248	599	175	114	24	228	40	3,387	8,378	8.82														
1000	(25 @ 80)	(5 @ 120)	(2 @ 130)	(4 @ 90)	(4 @ 115)																																	
	2000	600	260	360	460	1060	106	400	5,246	472	50	270	22	200	1,312	630	184	120	24	240	40	3,563	8,809	8.81														
1100	(29 @ 80)	(5 @ 120)	(2 @ 130)	(4 @ 90)	(4 @ 115)																																	
	2320	600	260	360	460	1060	106	440	5,606	547	60	270	22	200	1,402	673	196	132	24	264	40	3,829	9,435	8.58														
1200	(31 @ 80)	(6 @ 120)	(2 @ 130)	(5 @ 90)	(4 @ 115)																																	
	2480	720	260	450	460	1060	106	480	6,016	547	60	297	22	200	1,504	722	211	144	24	288	40	4,058	10,074	8.40														



## Education Design Standards

### 9 to 12 SCHOOL

Capacity	INSTRUCTIONAL AREA									NON-INSTRUCTIONAL AREA											Total Non-area	Gross Area	Area per Student	
	Cr.	Sci	Anc	Anc	Inform. Services	Gym	Gym Stor.	Library	Total Inst. Area	Admin. & Staff	Wrap Around & Collaboration Space	Mechanical & Meter Rooms	Recycle Room (LEED)	Phys. Educ.	Circ.	Wall Area	Storage Area	Washrms Area	Accessible Washroom Facility	Flexible Space				Wiring Network
1800	(47 @ 80) 3760	(9 @ 120) 1080	(2 @ 130) 260	(8 @ 90) 720	(6 @ 115) 690	1675	168	810	9,163	780	90	378	22	350	2,291	1,100	321	216	24	432	45	6,048	15,210	8.45
1900	(50 @ 80) 4000	(9 @ 120) 1080	(2 @ 130) 260	(8 @ 90) 720	(7 @ 115) 805	1675	168	855	9,563	823	100	378	22	350	2,391	1,148	335	228	24	456	45	6,299	15,861	8.35
2000	(52 @ 80) 4160	(10 @ 120) 1200	(2 @ 130) 260	(9 @ 90) 810	(7 @ 115) 805	2025	203	900	10,363	823	100	405	22	400	2,591	1,244	363	240	24	480	45	6,736	17,098	8.55
2100	(56 @ 80) 4480	(10 @ 120) 1200	(2 @ 130) 260	(9 @ 90) 810	(7 @ 115) 805	2025	203	945	10,728	888	110	405	22	400	2,682	1,287	375	252	24	504	45	6,995	17,722	8.44
2200	(57 @ 80) 4560	(11 @ 120) 1320	(2 @ 130) 260	(10 @ 90) 900	(8 @ 115) 920	2025	203	990	11,178	888	110	432	22	400	2,794	1,341	391	264	24	528	45	7,240	18,417	8.37
2300	(61 @ 80) 4880	(11 @ 120) 1320	(2 @ 130) 260	(10 @ 90) 900	(8 @ 115) 920	2025	203	1035	11,543	963	120	432	22	460	2,886	1,385	404	276	24	552	45	7,569	19,111	8.31
2400	(63 @ 80) 5040	(12 @ 120) 1440	(2 @ 130) 260	(11 @ 90) 990	(8 @ 115) 920	2375	238	1080	12,343	963	120	459	22	460	3,086	1,481	432	288	24	576	45	7,956	20,298	8.46
2500	(66 @ 80) 5280	(12 @ 120) 1440	(2 @ 130) 260	(11 @ 90) 990	(9 @ 115) 1035	2375	238	1125	12,743	943	130	459	22	460	3,186	1,529	446	300	24	600	45	8,144	20,886	8.35
2600	(68 @ 80) 5440	(13 @ 120) 1560	(2 @ 130) 260	(12 @ 90) 1080	(9 @ 115) 1035	2375	238	1170	13,158	1010	130	486	22	500	3,289	1,579	461	312	24	624	45	8,482	21,639	8.32
2700	(72 @ 80) 5760	(13 @ 120) 1560	(2 @ 130) 260	(12 @ 90) 1080	(9 @ 115) 1035	2375	238	1215	13,523	990	140	486	22	500	3,381	1,623	473	324	24	648	45	8,656	22,178	8.21
2800	(73 @ 80) 5840	(14 @ 120) 1680	(2 @ 130) 260	(13 @ 90) 1170	(10 @ 115) 1150	2725	273	1260	14,358	990	140	513	22	500	3,589	1,723	503	336	24	672	45	9,057	23,414	8.36
2900	(77 @ 80) 6160	(14 @ 120) 1680	(2 @ 130) 260	(13 @ 90) 1170	(10 @ 115) 1150	2725	273	1305	14,723	1070	150	513	22	550	3,681	1,767	515	348	24	696	45	9,381	24,103	8.31
3000	(79 @ 80) 6320	(15 @ 120) 1800	(2 @ 130) 260	(14 @ 90) 1260	(10 @ 115) 1150	2725	273	1350	15,138	1070	150	540	22	550	3,784	1,817	530	360	24	720	45	9,612	24,749	8.25
3100	(82 @ 80) 6560	(15 @ 120) 1800	(2 @ 130) 260	(14 @ 90) 1260	(11 @ 115) 1265	2725	273	1395	15,538	1050	160	540	22	550	3,884	1,865	544	372	24	744	45	9,800	25,337	8.17

## Education Design Standards

### JUNIOR/SENIOR HIGH (7 to 12)

Capacity	INSTRUCTIONAL AREA									NON-INSTRUCTIONAL AREA											Total Non-area	Gross Area	Area per Student	
	Cr.	Sci	Anc	Anc	Inform. Services	Gym	Gym Stor.	Library	Total Inst. Area	Admin. & Staff	Wrap Around & Collaboration Space	Mechanical & Meter Rooms	Recycle Room (LEED)	Phys. Educ.	Circ.	Wall Area	Storage Area	Washrms Area	Accessible Washroom Facility	Flexible Space				Wiring Network
200	(4 @ 80) 320	(1 @ 120) 120	(1 @ 130) 130	(1 @ 90) 90	(1 @ 115) 115	490	49	85	1,399	150	20	108	11	105	350	168	49	24	12	48	40	1,085	2,484	12.42
250	(5 @ 80) 400	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	490	49	106	1,590	227	20	108	11	105	398	191	56	30	12	60	40	1,257	2,847	11.39
300	(7 @ 80) 560	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	490	49	127	1,771	227	20	108	11	105	443	213	62	36	12	72	40	1,348	3,119	10.40
350	(9 @ 80) 720	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	645	65	149	2,124	227	20	108	11	138	531	255	74	42	12	84	40	1,542	3,666	10.47
400	(9 @ 80) 720	(2 @ 120) 240	(1 @ 130) 130	(2 @ 90) 180	(2 @ 115) 230	645	65	170	2,380	227	20	162	11	138	595	286	83	48	12	96	40	1,718	4,097	10.24
450	(10 @ 80) 800	(2 @ 120) 240	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	645	65	191	2,571	307	30	162	11	138	643	308	90	54	12	108	40	1,903	4,474	9.94
500	(12 @ 80) 960	(2 @ 120) 240	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	645	65	212	2,752	307	30	162	11	138	688	330	96	60	12	120	40	1,994	4,746	9.49
550	(14 @ 80) 1120	(2 @ 120) 240	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	645	65	233	2,933	307	30	162	11	138	733	352	103	66	12	132	40	2,086	5,018	9.12
600	(15 @ 80) 1200	(3 @ 120) 360	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	645	65	255	3,155	307	30	189	11	138	789	379	110	72	12	144	40	2,221	5,375	8.96
650	(16 @ 80) 1280	(3 @ 120) 360	(2 @ 130) 260	(3 @ 90) 270	(2 @ 115) 230	935	94	276	3,705	397	40	189	11	170	926	445	130	78	24	156	40	2,605	6,310	9.71
700	(17 @ 80) 1360	(3 @ 120) 360	(2 @ 130) 260	(3 @ 90) 270	(3 @ 115) 345	935	94	297	3,921	397	40	189	11	170	980	470	137	84	24	168	40	2,711	6,631	9.47
750	(19 @ 80) 1520	(3 @ 120) 360	(2 @ 130) 260	(3 @ 90) 270	(3 @ 115) 345	935	94	318	4,102	397	40	189	11	170	1,025	492	144	90	24	180	40	2,802	6,904	9.20
800	(20 @ 80) 1600	(4 @ 120) 480	(2 @ 130) 260	(3 @ 90) 270	(3 @ 115) 345	935	94	339	4,323	397	40	216	22	170	1,081	519	151	96	24	192	40	2,948	7,270	9.09
850	(21 @ 80) 1680	(4 @ 120) 480	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	935	94	361	4,515	472	50	216	22	170	1,129	542	158	102	24	204	40	3,128	7,643	8.99
900	(23 @ 80) 1840	(4 @ 120) 480	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	935	94	382	4,696	472	50	216	22	170	1,174	563	164	108	24	216	40	3,220	7,915	8.79
950	(25 @ 80) 2000	(4 @ 120) 480	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	1190	119	403	5,157	472	50	216	22	220	1,289	619	180	114	24	228	40	3,475	8,632	9.09
1000	(25 @ 80) 2000	(5 @ 120) 600	(2 @ 130) 260	(4 @ 90) 360	(4 @ 115) 460	1190	119	425	5,414	472	50	270	22	220	1,354	650	189	120	24	240	40	3,651	9,065	9.06
1100	(29 @ 80) 2320	(5 @ 120) 600	(2 @ 130) 260	(4 @ 90) 360	(4 @ 115) 460	1190	119	467	5,776	547	60	270	22	220	1,444	693	202	132	24	264	40	3,918	9,694	8.81
1200	(31 @ 80) 2480	(6 @ 120) 720	(2 @ 130) 260	(5 @ 90) 450	(4 @ 115) 460	1190	119	510	6,189	547	60	297	22	220	1,547	743	217	144	24	288	40	4,149	10,338	8.61

## Appendix D: Area Exemptions and IMR Funding Policy for Jurisdiction-Owned School Space

	Type of Use	Area Exemption	Rent/Lease Charges	IMR Funding
1	Closed school (subject to section 2(a) of the <i>Closure of Schools Regulation</i> )	Not Granted	N/A	No further IMR funding (Decentralized administration space in closed schools or in functioning schools will not receive IMR funding)
2	Lease to Cross-Government Sector	Granted	Cost or Nominal Fee	IMR funding continues except in the case of decentralized Admin leases
3	Lease to Non-Profit Sector (Including ECS, Private Operators)	Granted	Cost or Nominal Fee	IMR funding continues
4	Lease to Charter School *	Granted	No Maximum or Minimum	IMR funding provided to lessor in lieu of lease funding.
5	Lease to Accredited Private Schools	Granted	No Maximum or Minimum	No further IMR funding
6	Lease to Registered Private Schools	Granted	No Maximum or Minimum	No further IMR funding
7	Lease to Private Sector for non-Private School Use.	Not Granted	No Maximum or Minimum	No further IMR funding

\* See section on Leasing.



## Appendix E: Disposition of Schools and Land

### Terms and Conditions – Disposition of Schools and Land

When a school jurisdiction declares a school building surplus to its needs, consideration should be given to other public education purposes and community services. The *Disposition of Property Regulation*, addresses issues pertaining to the sale and lease of school and non-school buildings and land.

The *Disposition of Property Regulation* is currently under review as part of the review of regulations for the *Education Act*.

### Sale

Jurisdictions are requested to notify Capital Planning, Education of their intent to dispose of property prior to making a formal request for ministerial approval. Receiving the notification of intent in advance of the formal request will allow government to identify any interest in the property prior to the school jurisdiction's seeking appraisals and engaging a potential buyer.

This two-stage process allows Capital Planning staff to first conduct the relevant background checks necessary to make a recommendation to the Minister of Education. These checks will include identification of potential alternative uses for the property, identification of potential government uses and verification of land title. Once this notification is given the jurisdiction may begin fulfilling any applicable Disposition of Property Regulation AR181/2010 requirements.

The initial notification of intent to dispose can be made in writing to the designated Capital Planning contact. After Capital Planning has notified the school jurisdiction that the checks are complete and has identified no obstacles to disposition, the school jurisdiction may proceed with gathering the required appraisals and tendering of the property. Once a buyer has been identified, a written request for ministerial approval, including legal land description, buyer information, selling price, number of bids and appraisal values (if required by the Regulation) should be made to the Executive Director, Capital Planning, Education.

The use of the proceeds from the sale of school facilities is determined according to a formula described in the *Disposition of Property Regulation*. The Regulation describes the requirements associated with the sale of the property.

### Lease

- Vacant school space should be directed toward use intended for community and public needs whenever possible and feasible.
- Individuals or corporations entering into a lease agreement with a school board must have legal status acceptable to Education.
- Under section 2(2)(b) of the *Disposition of Property Regulation*, a board leasing out a school building, or a portion thereof, shall complete the "Leasing of School Space" form.
- Lease of school property does not require ministerial approval, however, if the lease is for a period of one year or longer, the agreement must include a 12-month termination clause.

### Land

In accordance with section 200 (2) of the *School Act*, a board may, with prior written approval of the Minister, sell, lease, rent or otherwise dispose of any of its real property. Sections 671 to

677 of the *Municipal Government Act* address the terms and conditions of the use and disposal of Reserve Land.

## Appendix F: Infrastructure Maintenance and Renewal (IMR) Program Funding Priorities and Project Categories

Event Types Table Title	Definition	Example
Maintenance (Included in FCI Rating Calculation)		
Failure Replacement	Replacement of one technical (component) for another having the capacity to perform the original function based on actual failure or observed deterioration that can reasonably predict remaining actual service life. Replacement may arise from obsolescence, lack of parts, cumulative effect of wear and tear, premature failure, or destruction through exposure to fire or other hazard.	Roof has wet insulation and has been previously patched. Roof will require replacement in two years. Or Roof has major defects and requires replacement immediately.
Life Cycle Replacement	Replacement of a technical (component) based on a theoretical service life. Start year for this event type must be 2015 or beyond. Where there is observed deterioration that can reasonably predict remaining actual service life the event should be classified as Failure Replacement.	Roof has no deficiencies. Theoretical life is 25 years. If roof is 15 years old, replace in 10 years If roof is 25 years old, replace in 2015.
Repair	Work to restore a damaged or worn-out technical (component) to a normal operating condition. This may require the replacement of damaged or worn-out parts.	Repair roof leak. Replace flashing around chimney.
Preventive Maintenance	Tasks undertaken to maintain a technical (component) or part at a specified level of performance and to achieve its theoretical service life. Preventive maintenance includes such work as periodic inspection; adjustment, overhaul, painting; replacement of consumable parts, resurfacing; and other actions to assure continuing service and to prevent breakdown.	Paint wood siding to prevent rot
Code Repair	Work required to effect compliance with the code under which the original facility, additions or major alterations were designed. In the absence of records, it is generally assumed that buildings were built according to the code in place at the time of construction.	Patch holes in ceiling that forms part of a fire separation

	However evaluations may reveal non-compliance with the relevant code at the time of construction or the authorities having jurisdiction over the code may deem newer requirements to be retroactive. Action to correct this non-compliance is considered a code repair.	
Hazardous Materials Abatement	Work to contain or remove materials that are an immediate hazard to building occupants	Replace ceiling tiles that contain asbestos. Fibers falling on staff.

Study (Not included in FCI Rating Calculation)		
Study	Study to determine the need for and the scope of an event. Provide two events: one for the cost of the study and one to correct the deficiency with an order of magnitude cost .	Study to determine scope and cost for new ceiling system

Upgrading (Not included in FCI Rating Calculation)		
Code Upgrade	Work which the current Building Code requires for new buildings but is not retroactive for buildings built prior to the current code. This work may be required if there is a major renovation or change in use of a facility. It may also be determined that the work should be done to meet acceptable standards.	Install sprinkler system
Barrier Free Access Upgrade	Work that addresses a situation that is not a retroactive code requirement but would significantly improve accessibility for persons with physical or sensory mobility restrictions.	Widen doors to all washrooms
Indoor Air Quality Upgrade	Work that addresses a situation that is not a retroactive code requirement but would improve indoor air quality.	New or expanded ventilation system to meet current occupational health and safety indoor air quality standards.
Hazardous Material Management Upgrade	Work to remove a hazardous material that is contained and is not a current hazard to building occupants. Removal may be required if area is to be renovated.	Replace asbestos fire proofing material on roof joists above ceiling. No fibers coming loose.
Energy Efficiency Upgrade	Work that will reduce energy consumption, with a maximum of a 6-year payback period. Recommendations should include an estimate of "payback" time and note if	Replace classroom lighting with high efficiency fixtures.

	work must be done in conjunction with other work to be financially viable	
Program Functional Upgrade	Changes to the interior arrangements or other physical characteristics of an existing facility or installed equipment so that it can be used more effectively for its currently designated program or adapted to a new use.	Enlarge CTS room; Replace good condition but dated carpet to improve building image. Install computer room security system. Increase electrical panel capacity for future loads.
Operating Efficiency Upgrade	Changes to the interior arrangements or other physical characteristics of an existing facility or installed equipment so that it can be operated more efficiently. Recommendations should include an estimate of "payback" time and/or note if work must be done in conjunction with other work to be financially viable	Replace carpet with tile to reduce the cost

## Appendix G: Protocol for Provision of Space for Charter Schools

1. A person or society wishing to establish a charter school should also refer to the following for information about capital support and leasing assistance as well as for general information on establishment of a charter:
  - School Act, Part 2 - Division 3
  - Alberta Regulation 212/2002- *Charter School Regulation*
  - Education's *Funding Manual for School Authorities*
  - <http://education.alberta.ca/admin/funding/manual.aspx>
  - Education, Charter School Handbook  
[http://education.alberta.ca/media/434258/charter\\_hndbk.pdf](http://education.alberta.ca/media/434258/charter_hndbk.pdf)
  - Education, Guide for Charter School Education Planning and Results Reporting  
<http://education.alberta.ca/media/441527/CharterSchGuide2007.pdf>
  - Education's Capital Planning staff is aware of all new charter applications, and can facilitate access to facilities. The date on which a new charter school commences operations or an existing charter school expands its operations to new facilities will be subject to availability of space.
2. Existing charter operators will request additional or new space needs by including the request in its Three-Year Capital Plan submitted to Education. Education will review the request to ensure the request is consistent with the operator's charter, including: approved enrolment cap, program need, grade structure, school capacity, enrolment, space utilization, status of the charter term, and the timing necessary to facilitate the space request.
3. The Capital Planning Branches of Education will work to facilitate access to additional school space within the approved enrolment cap.
4. Education funding may be provided for a charter board to lease a facility subject to the needs identified and supported by Education.

## Appendix H: List of References

### Education Resources

*Charter Schools Regulation*

[http://qp.alberta.ca/570.cfm?frm\\_isbn=0779743687&search\\_by=link](http://qp.alberta.ca/570.cfm?frm_isbn=0779743687&search_by=link)

*Closure of Schools Regulation*

[http://qp.alberta.ca/570.cfm?frm\\_isbn=9780779735167&search\\_by=link](http://qp.alberta.ca/570.cfm?frm_isbn=9780779735167&search_by=link)

*Disposition of Property Regulation*

[http://qp.alberta.ca/570.cfm?frm\\_isbn=9780779732708&search\\_by=link](http://qp.alberta.ca/570.cfm?frm_isbn=9780779732708&search_by=link)

*School Act*

[http://qp.alberta.ca/570.cfm?frm\\_isbn=9780779733941&search\\_by=link](http://qp.alberta.ca/570.cfm?frm_isbn=9780779733941&search_by=link)

*School Buildings and Tendering Regulation*

[http://qp.alberta.ca/570.cfm?frm\\_isbn=0773263403&search\\_by=link](http://qp.alberta.ca/570.cfm?frm_isbn=0773263403&search_by=link)

### Infrastructure Resources

Construction Management : An Owners Guide to Using the Construction Management Project Delivery System on Alberta Infrastructure Funded Building Projects

<http://www.infrastructure.alberta.ca/738.htm>

Consultant Selection Policy for Building Infrastructure Consulting Services

[www.infrastructure.alberta.ca/Content/docType486/Production/consulselect.pdf](http://www.infrastructure.alberta.ca/Content/docType486/Production/consulselect.pdf)

Design and Construction: Standards and Guidelines for School Facilities

<http://www.infrastructure.alberta.ca/738.htm>

Operations and Maintenance: A Guide for School Trustees, Administrators and Consultants

<http://www.infrastructure.alberta.ca/738.htm>

School Facilities: Guidelines for Upgrades to Building Elements and Systems

<http://www.infrastructure.alberta.ca/738.htm>

Technical Design Requirements for Alberta Infrastructure Facilities

<http://www.infrastructure.alberta.ca/992.htm>

### Other Government Resources

*Municipal Government Act*

[http://qp.alberta.ca/570.cfm?frm\\_isbn=9780779741069&search\\_by=link](http://qp.alberta.ca/570.cfm?frm_isbn=9780779741069&search_by=link)

*Alberta Building Code Regulation*

<http://www.qp.alberta.ca/>

### External Resources

Agreement on Internal Trade  
[www.ait-aci.ca](http://www.ait-aci.ca)

Canadian Standard Form of Contract for Architectural Services  
[www.raic.org/practice/contract\\_documents/document6\\_e.htm](http://www.raic.org/practice/contract_documents/document6_e.htm)

New West Partnership Trade Agreement  
<http://www.newwestpartnershiptrade.ca>

Recommended Conditions of Engagement & Schedule of Professional Fees for Building  
Projects  
<http://www.apegga.org/Members/Publications/guidelines.html>



## Appendix I: Furniture and Equipment Items

Area	Typical Items Provided From F&E Allocation
Gymnasium:	<p>Includes:</p> <ul style="list-style-type: none"> <li>-- Score board / shot clock</li> <li>-- Loose recreational equipment such as mats and gymnastics equipment</li> <li>-- Portable stage, carts, laundry storage tubs, projector screen, stage curtains, bleachers, shower curtains, weight/cardio equipment, training equipment and climbing equipment or systems</li> <li>-- Light fixtures for stage lighting, sound system and portable speakers for stage.</li> </ul>
Library:	<p>Includes:</p> <ul style="list-style-type: none"> <li>-- All moveable bookshelves</li> <li>-- Computer workstations, tables, chairs</li> <li>-- Book detection system, projectors</li> </ul>
Classrooms:	<p>Includes:</p> <ul style="list-style-type: none"> <li>-- Moveable educational casework, whiteboards, tackboards, electronic whiteboards, projectors, screens, desks, chairs and window dressings.</li> </ul>
CTS	<p>Includes:</p> <ul style="list-style-type: none"> <li>-- Appliances, flammable and hazardous materials storage cabinet, eye wash bottles, air compressor, projectors, whiteboards, tackboards, electronic whiteboards, power tools, desks, chairs, window dressings, welding booth bench and equipment, fire curtain and exhaust system, dust collector drops to equipment.</li> </ul>
Science, Art, Music, Food and Fashion, and ECS Rooms	<p>Includes:</p> <ul style="list-style-type: none"> <li>-- Appliances, flammable and hazardous materials storage cabinet, moveable science tables, kilns, silk screen sink, eye wash bottles, movable paper and musical instrument storage cabinets, projectors, whiteboards, tackboards, electronic whiteboards, desks, chairs, and window dressings.</li> </ul>
Administration, Staffroom, Staff Work Area	<p>Includes:</p> <ul style="list-style-type: none"> <li>-- Office equipment, appliances, white boards, tackboards, all movable cabinets and furnishings such as desks, couches, chairs and tables</li> </ul>
Infirmary and Special Needs	<p>Includes:</p> <ul style="list-style-type: none"> <li>-- Staff desk, chairs, cot, tackboard, fridge, medical equipment, change tables and lift</li> </ul>
Servery	<p>Includes:</p> <ul style="list-style-type: none"> <li>-- Appliances</li> </ul>

Other Systems	Includes: -- Public address system, cable television, CCTV cameras, telephone system excluding cable for all these systems
Miscellaneous	Includes: -- Signage to identify teacher's name, free-standing site signs and/or site message boards, boot racks, stage drapery, stage lighting, hand dryers, paper towel dispensers and disposal units, toilet paper dispensers, and soap dispensers.

## Appendix J: Advantages and Disadvantages of Different Project Delivery Approaches and Factors to Consider

### Design-Bid-Build

#### Advantages

- Familiarity. It is commonly used in the construction industry and the roles are all well defined.
- Well developed contract documents and procedural guidelines.
- Owner maintains full control of the design, finishes, and the overall process.
- Project award is based on lowest bid (tender) that is received through a competitive bidding process.
- An RFQ stage can be incorporated to shortlist qualified proponents.

#### Disadvantages

- If an RFQ stage is not undertaken, then the award is based on the lowest bid and does not consider the Contractor's qualifications and experience.
- It is the longest method (from start to finish) compared to other methods.
- Contract documents including drawings and specifications are typically completed in a single package before construction begins, requiring accurate project related decisions in advance of actual execution.
- There is limited opportunity to make cost effective changes, reduce budgets etc. Any changes made after the contract award can negatively affect the budget and/or project schedule.

### Design-Build

#### Advantages

- They are minimal contractual relationships to manage. A single point of responsibility for design and construction.
- The Design Build team carries the majority of the risk reducing the chances for change orders.
- The project cost and schedule are known factors at the beginning of a project.
- A "Fast Track" method can be implemented by the Design Build team which can shorten construction time.

#### Disadvantages

- Typically the Owner has the least amount of control of the design, finishes, and overall process.
- Owners may have limited experience with this system and may be uncomfortable with the integration of services.
- Potential cost savings may conflict with building quality and/or maintenance costs.
- Quality of finishes and/or products may suffer if appropriate performance specifications are not developed.

### Construction Management

#### Advantages

- The Construction Manager provides significant cost, schedule and constructability input into the design. Phasing of work in occupied buildings can benefit from the CM's expertise.
- A "Fast Track" approach can be implemented as the design and construction can overlap.
- The CM can help manage the budget and schedule and sub-trades are procured through public competitive bidding by the CM.
- The CM can be selected based on aspects other than total cost i.e. qualifications and experience of the firm and its personnel and even sub-contractors.

#### Disadvantages

- The open-ended nature of many CM contractual arrangements.
- The total project cost is not known until all bid packages are awarded.
- There is a potential decrease in competition for trade contractors because of the added bidding requirements.
- There is the possibility of overlaps or gaps in the scopes of work.

### Integrated Project Delivery

**Advantages**

- Optimization of the project team's performance by collaboratively working towards a common project vision.
- Parties to an IPD team have incentives to do what is best for the project, rather than what might be best for themselves.
- Encourages stakeholders to make decisions at appropriate times in relation to project schedule which in turn can reduce project timelines.
- There is no such thing as one way to do a project by IPD, so it offers flexibility.

**Disadvantages**

- Project costs may increase as team members are involved throughout the entire project rather than at specific stages.
- The project team may decide to increase the initial project budget in favour of reducing overall life cycle maintenance costs.
- Getting all of the IPD team members to agree on one form of multi-party agreement could prove to be impossible or exasperating.
- The flexible nature means that specific processes and templates are not available.
- Requires "buy-in" from all stakeholders and any personnel added to project.

## Appendix K: List of Forms

- New School Project Application is available in the Web-based Application (WAP).
- Expansion and Modernization Project Application is available in the Web-based Application (WAP).
- The following school forms are available on-line at <http://www.education.alberta.ca/department/ipr/capitalplanning/infrastructureresources.aspx>
  - Form 1 – Notice of School Opening Ceremony
  - Form 2 – School Openings Information Sheet
  - Form 3 – Statement of Final Costs
  - Form 4 – Leasing of School Space
  - Form 8 – Site Readiness Checklist
  - Form 9 – New Modular Request
  - Form 10 – Relocation of Portable/Modular Classroom Requests
  - Form 12 – ReCAPP@IMR Report Cover Sheet
  - Form 13 – Lease Funding Request Form
  - Form 14 – Modular Prep Sheet
  - Form 15 – Modular Relocation Prep Sheet
  - Form 16 – Declaration of Surplus Modular Classrooms Form
  - Form 17 – F&E Reporting Requirement Form
  - Form 18 – Instructional Area Form