

Building Together – It's Time to Act

Infrastructure Report



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Executive Summary

The Alberta School Boards Association (ASBA) has long been concerned about how Alberta Education plans and funds school buildings. Because of this concern, the ASBA has identified School Infrastructure and its related issues as a priority advocacy initiative for 2009.

At the April 26, 2008 Alberta School Council's Association annual meeting, Education Minister David Hancock "blasted his own government's handling of the educational system..., calling the way the province plans schools 'absolutely insane' and in need of review."

Both the ASBA and Alberta Education have identified the priority need to provide safe and functional schools for Alberta's approximately 600,000 children where and when needed.

Despite the common priority and goal shared by Alberta Education and ASBA, many of Alberta's school boards report frustration in their attempts to provide functional and safe school buildings to their growing communities or to maintain existing schools.

Alberta's School Act creates a positive duty for school boards to provide and maintain adequate real property. The ASBA position is that in a free and open democracy, it is the electorate who ultimately determine "adequacy" of school facilities. Publicly elected school boards represent the community "voice" about school facilities, and through their three year capital plans, give shape and substance to this voice.

The ASBA infrastructure advocacy committee, in an effort to begin addressing the priority infrastructure issues faced by school boards, has requested that a report be prepared, in consultation with school boards, that provides a provincial overview of school infrastructure and its key successes and pressure points. Pursuant to this request, Alberta's school boards were surveyed in February 2009 and asked to rate and comment on a number of facility issue statements that were grounded in ASBA policy positions.

In this survey, school boards identified the following infrastructure related promising practices:

- Energy Conservation and Security Measures
- Use of In-House Trades Personnel
- Standardization of Building Components and Upgrades to Building Finishes
- Positive Working Relationship With Alberta Education and Infrastructure Capital Branch Personnel
- Alberta School Alternative Procurement (ASAP) School Design and Construction Process
- Electronic Maintenance Request Systems

- Engaging in a “Value Analysis Scoping Session” with Alberta Education and Alberta Infrastructure
- Partnerships
- Modular Classroom Design and Use
- Local Capital Planning Process
- Staff Retention Practices

School boards also rated and made numerous comments about the school infrastructure pressure points they face. An analysis of school board survey results indicates that board infrastructure priorities vary markedly by board type and circumstances. For example, the priorities of rural school boards are different from those of metro and urban boards and different again from those of francophone boards. This, in part, relates to issues like student demographics. Many rural boards, for example, have a declining student population and therefore establish a higher priority on maintaining existing facilities as opposed to building new ones. Jurisdictions with growing student populations (metro, urban, francophone and jurisdictions along Alberta’s highway no. 2 corridor) place priority on providing new schools to growing neighbourhoods that currently do not have schools.

School boards identified the following priority pressure points and provided numerous examples and stories about these pressure points:

Priority Issue #1: The difficulty replacing or preserving aging school buildings

Alberta’s Budget 2008 (Capital Plan 2008-11, p. 112) provides funding of \$195 million for capital maintenance and renewal. This represents a \$135 million dollar shortfall from the 2 per cent of replacement value accepted standard.

In addition to not meeting current infrastructure maintenance and renewal demand, the \$195 million allocation does nothing to reduce the backlog of deferred maintenance and renewal projects. Alberta Education’s five year capital Plan, *Schools for Tomorrow* (2006) estimates that the backlog in deferred maintenance at \$1.6 billion dollars.

Issue #2: School board efforts to provide school facilities (and modular classrooms) to growing communities in a timely and proactive manner

School boards believe that Alberta Education has not met its commitment of providing schools to growing communities where and when needed.

Issue #3: The ad hoc nature of funding mechanisms and programs

School boards have identified the challenge of managing infrastructure pressures with ad hoc funding. Though Alberta’s *Learning Commission* (2003) speaks to the importance of sufficient and predictable capital funding for school boards in recommendation 22, school boards do not believe that this goal has been achieved. This continues to rank as a major concern for school boards.

Issue #4: The calculation and use of utilization rates for schools

School boards are concerned about the method of calculating and the use of utilization rates for schools

Issue #5: The effectiveness of the current long term capital planning and approval process

School boards are concerned about the lack of clarity, transparency and feedback in the provincial approval process related to their three and ten year capital plans. The Edmonton Journal (April 27, 2008) writes: “What, indeed, is the point of asking school board administrators to churn out careful capital spending plans if the adults in the education ministry say simply “thanks for sharing”, use them to line the bird cage and then make the decisions they believe are best.”

Issue #6: The lack of funding for school board non-instructional space

School boards do not understand why funding for needed support infrastructure is absent.

Issue #7: The lack of flexibility to meet community needs with regard to school facilities

School boards have consistently maintained that the development of education in Alberta has always been a community issue and that the current inability of school boards to access the local tax base has significantly reduced school board flexibility to respond to local circumstances.

Issue #8: The lack of provincial funding for the facility and equipment costs associated with provincial initiatives such as the new occupational health and safety requirements

School boards continue to express concerns about “unfunded mandates.”

Issue #9: Site preparation and servicing costs as well as issues with land use and zoning

Several boards raised this issue.

Issue #10: The current school closure process

While boards are prepared to deal with school closure issues as necessary, they would like to reframe this issue from a “lose-lose” scenario to a “lose-win” scenario so that funding would be provided for a “positive” outcome of school closures, such as a new or renovated community school.

The February 2009 survey also asked school boards to identify any other infrastructure issues of concern to them. Most school boards raised the need for sufficient funding to properly manage the building, maintenance and operation of schools. Some boards made the point that Alberta could achieve predictability in funding or improvements to the capital planning process but without adequate funding, improvements in processes would be hollow.

Conclusion

School boards are charged with a duty to “provide and maintain adequate real and personal property.” They take this legislated responsibility very seriously. At present, Alberta’s school boards are facing two competing priority challenges, maintaining and upgrading an aging school infrastructure and providing new student spaces in rapidly growing communities. Like Minister Hancock, they believe that the current method and adequacy of providing schools to the province’s children is broken and needs fixing. Alberta’s school boards support the three key priorities outlined in Alberta Education’s Five year capital plan and are committed to working with the Alberta Government to achieve these priorities. “Surely, the decision-making process”, asserts an Edmonton Journal Editorial (April 29, 2008), “should be a collaborative venture between the level of government that embodies the responsibility the whole province has to each child, and the body chosen by the local community that represents more closely the child’s parents and their friends and neighbours.” School boards are committed to working together, recognizing the time to act is now.

Part One: Report Purpose and Background

Report Purpose

The Alberta School Boards Association (ASBA) has long been concerned about how Alberta Education plans and funds school buildings. Because of this concern, the ASBA has identified School Infrastructure and its related issues as a priority advocacy initiative for 2009. Quite simply, Alberta's school boards share Minister Hancock's sentiment that the current system for planning and funding school infrastructure is broken and in need of fixing.

At the April 26, 2008 Alberta School Council's Association annual meeting, Education minister David Hancock "blasted his own government's handling of the educational system..., calling the way the province plans schools 'absolutely insane' and in need of review" (Steve Lillebuen, Edmonton Journal, April 27, 2008).

Pursuant to this priority, the ASBA infrastructure advocacy committee, chaired by Serafino Scarpino, has requested that a report be prepared, in consultation with School Boards, that provides a provincial overview of School Infrastructure and its key successes and pressure points.

The information contained in this report will help to inform school boards about best practices and common pressure points. ASBA believes that defining, illustrating and prioritizing the infrastructure problems school boards are facing is an important step to "fixing" these problems. The ASBA believes that like airplanes, lift is best achieved by facing into the wind.

Alberta's Commitment to School Infrastructure

Both the ASBA and Alberta Education have identified the priority need to provide safe and functional schools for Alberta's approximately 600,000 children where and when needed. Alberta Education has developed a five year strategic plan, *Schools for Tomorrow*, (2006), that supports the Alberta Governments *20-Year Strategic Capital Plan* (2008). Responsibility for school infrastructure has moved back to Alberta Education from Infrastructure and Transportation.

The key objectives for school facilities outlined in the Alberta Government *20-Year Strategic Capital Plan* (2008) include:

- Provide schools close to where students live (particularly in high growth communities), and meet the needs of Alberta's growing student population.
- Alternative options will be explored for the provision of Career and Technology Studies (CTS), including additional mobile CTS labs and proposals for regional skill centres.
- Increase the use of steel-framed modular classrooms to provide flexibility and respond to a growing population.
- Expand investment in capital maintenance and renewal to maintain existing facilities.

The 2008-2011 Alberta Capital Plan (Budget 2008) commits to “priority school infrastructure revitalization projects throughout the province including roof repairs, health and safety upgrades, mechanical system replacements and energy efficiency improvements, and 134 new or major modernization projects in various stages of completion. This includes 20 new schools, replacement schools, major additions and modernizations, scheduled to open in 2008-09.”

Alberta Education’s five year capital plan, “*Schools for Tomorrow*” (2006), outlines 3 key priorities:

1. **New Schools** – New schools must be constructed to provide space to meet enrolment needs, to accommodate educational program demands, or to replace aging and/or obsolete facilities.
2. **Major Modernizations** – Major modernizations of existing schools will improve the physical quality and functionality of school facilities across the province and will further address the backlog of deferred maintenance projects.
3. **Steel-framed Modularity** – New, state-of-the-art, steel-framed modular classrooms will provide timely and flexible solutions to address changing demographics and other space issues (p.3).

Despite the common priority and goal shared by Alberta Education and ASBA, many of Alberta’s school boards report frustration in their attempts to provide functional and safe school buildings to their growing communities or to maintain existing schools. School boards support the provinces school infrastructure goals but believe these goals are not being met.

Student Demographics

Students drive the need for school buildings. Alberta Education’s five year capital plan (2006) outlines the shifting student demographics of Alberta’s landscape.

There are a number of key trends in enrolment that influence school infrastructure planning and development in Alberta, including:

- increasing populations in metro areas and in major cities;
- notable patterns of urban and suburban growth (significant increases in the September 29, 2006 student-counts in Edmonton and Calgary);
- increased growth in the Aboriginal population;
- increasing numbers of students with special needs, many of whom have unique needs and require additional space;
- increasing numbers of immigrant students requiring English as a Second Language (ESL) programs, frequently in smaller class-sizes, and other assistance in support of the government’s new 10-year labour force development strategy, *Building and Educating Tomorrow’s Workforce*; (NOTE: In September, 2005, there were 37,300 ESL students in Alberta. Based on recent research, we know that each month there are

approximately 1,500 new arrivals in Alberta between the ages of 0 - 18, with most settling in Calgary – 58 per cent – and Edmonton – 29 per cent. ESL student enrolments have been increasing at a rate of 14 per cent per year.), and

- declining student populations in some rural and remote areas, with some jurisdictions experiencing up to 3 per cent annual reductions in their total student populations.

The Legislative Framework

Alberta's school boards are guided by a complex legislative framework in their quest to provide school and support facilities.

The primary Legislation governing school board property is Alberta's School Act, specifically Part 7 (Property) and related sections 195 to 206. The School Act, section 195, creates a positive duty for school boards regarding real and personal property, namely:

195 A board shall provide and maintain adequate real and personal property for its administrative and educational purposes.

While section 195 creates a duty for school boards, it raises some questions with regard to what "adequate" looks like and who defines this adequacy. The ASBA position regarding these questions is that in a free and open democracy, as is the case in Alberta, it is the electorate who ultimately determine "adequacy" of school facilities. Publicly elected school boards represent the community "voice" about school facilities, and through three year capital plans, give shape and substance to this voice.

The limit to this positive duty is section 205(1) which stipulates that the "school jurisdiction must obtain the approvals required under the regulations from the Minister."

Section 60 of the School Act stipulates that a Board must maintain, repair, furnish and keep in good order all its real and personal property;

In summary, Part 7 of the school act deals with the following property issues:

- 195 Real and personal property
- 196 Acquisition of property
- 197 Joint property
- 198 Buildings other than school buildings
- 199 Expropriation
- 200 Disposition of property
- 201 Regulations

Division 2

School Buildings

- 203 Approval
- 204 School building projects
- 205 Approval of project
- 206 Regulations

A number of regulations dealing with property flow from the School Act:

- Capital Borrowing Regulation- 188/1998
- Closure of Schools Regulation- 238/97
- Disposition of Property Regulation- 3/2001
- School Buildings and Tendering Regulation- 383/1988
- Special School Tax Levy Plebiscite Regulation- 94/1998

In addition, school boards must adhere to provincial policy and related manuals, namely:

- School Capital Funding Policy 3.1.6
- Funding Manual for School Authorities
- School Infrastructure Manual (2003)- under revision

Other guiding documents impacting School board infrastructure decisions include the Municipal Act, the *Government of Alberta 20-year Strategic Capital Plan* (2008) and the Alberta Education five year capital plan titled *Schools for Tomorrow* (2006).

The Funding Framework

Alberta Education Policy 3.1.6, last updated in 2003, provides an overview of the School Capital Funding Framework. The capital programs funded by Alberta Education include:

- New School Construction Program – designed to provide space to meet enrolment needs, educational program demands, or to replace obsolete facilities. This program also funds steel framed modular classrooms.
- School Modernization Program – designed to upgrade schools to overcome health and safety concerns and educational program functional deficiencies, and to upgrade architectural finishes, structural components and mechanical electrical services.
- The Building Quality Restoration Program (BQRP) – **authors note – This program is now referred to as the Infrastructure Maintenance Renewal (IMR) Program. Provincial policy 3.1.6 continues to reference BQRP although the current Funding Manual references IMR.**

This program is designed to maintain the quality of the school environment, and prolong the life of school facilities through

replacement of individual building components which have failed through wear, tear or aging. It also supports energy efficiency retrofits.

- Other capital projects such as site acquisition and development, furniture and equipment associated with projects approved by the Minister.

In addition to the above capital programs, Alberta Education provides annual operating funds for Plant Operations and Maintenance (POM). This program provides funding to school jurisdictions for the maintenance and day-to-day operation of school buildings (i.e., heating, ventilation, lighting, cleaning), and for the repair and replacement of equipment and materials used for routine maintenance.

With regards to the question of moving funds between Capital programs, The School Act (section 152) stipulates that funding for capital purposes can not be used for other operating purposes (without prior approval of the Minister) and the current Alberta Education *Funding Manual* stipulates that funding from one capital program such as IMR can not be transferred to another. Some boards have used POM funding to “top off” inadequate IMR funding.

The Decision Making Framework

During the summer of 2005 the School Facilities funding envelope was transferred from Alberta Infrastructure back to Alberta Education with a Memorandum of Understanding formalizing the transfer and the relationship between the two departments.

The Capital Planning Branch was established in Alberta Education. The branch is responsible for administration, planning, reviewing and recommendations for the School Infrastructure Funding Envelope. The Envelope includes the School Capital Envelope, IMR Envelope, and the POM Envelope. The School Capital Envelope provides funding for new school facilities, school modernizations, modular classrooms and leasing. The Capital Planning Branch works closely with school boards to act as a resource and advise on capital planning, capital requests, the expenditure of IMR and POM funding, emergent request and school facilities issues. The Branch does this through regular formal and informal meetings with school boards. The Branch also receives the school board updated 3-year capital plans on an annual basis and takes a leadership role in the assessment and ranking of the plans for the Capital Planning Initiative (CPI).

Alberta Education is responsible for the School Infrastructure Manual and the policy and procedures identified within. The Branch also develops and administers any special projects as directed by the Minister of Education.

The Capital Planning Branch acts as a resource to other divisions and branches within Alberta Education with regard to the impact policies, procedures and projects will have on school facilities. Examples in the past have been Daily Physical Activity and the Class Size Initiative.

Alberta Education is working on a revised draft of the School Infrastructure Manual which was last updated October 2003.

Alberta Infrastructure, specifically the Capital Programs Branch, School Facilities, implements the school facilities projects on behalf of Alberta Education once the projects have been approved by Treasury Board and the Minister of Education. The Branch, also on behalf of Alberta Education, reviews school board's IMR Expenditure Plans to ensure that the funding is being allocated to the approved priorities and categories.

Alberta Infrastructure is a technical resource to Alberta Education and the school boards in such areas as building sciences (structural, mechanical, electrical, building envelope, interiors), project scoping and costing, specifications and contracts. During the CPI process the Capital Programs Branch provides Alberta Education with an assessment of the capital requests made by boards. Alberta Education and Alberta Infrastructure then consult on the ranking of school facility projects. The Capital Programs Branch reviews approved school facility projects at prescribed points throughout the project to ensure the design and construction meet the approved project scope and budget. The Branch also acts as a resource to school boards in identifying scope and budgets for projects, particularly for modernization projects. Recently the Capital Programs Branch has implemented Value Management Sessions with consultants to facilitate a process to identify the best facility solution, be it modernization or new construction complete with scope and budget.

Alberta Infrastructure also implements special projects on behalf of Alberta Education. The Alternate School Procurement Initiative and the Standard Core Schools are two such initiatives. Alberta Infrastructure also on behalf of school boards and Alberta Education maintains the school facility data base and small scale school plans.

Alberta Infrastructure through its facility evaluation process reviews school facilities every five years through the RECAPP Facility Evaluation Reports, which are posted by board and school on the Alberta Infrastructure Web Site.

Key players within Alberta Education and Alberta Infrastructure can be found on their websites.

Part Two: Infrastructure Promising Practices and Pressure Points: The Voice of School Boards

ASBA Infrastructure Survey

Given the apparent commitment that the Government of Alberta has made to providing schools to Alberta's communities where and when needed, what are the views of Alberta's School Boards with regard to the implementation of this commitment?

A review of ASBA's *Governance Handbook* reveals no less than 22 policy statements regarding school infrastructure. These policy statements represent approximately 25 per cent of all ASBA policy positions contained in the *Handbook*. ASBA has designated school infrastructure a priority advocacy initiative in response to the numerous infrastructure issues debated at ASBA provincial and zone meetings which generally point to a school infrastructure program that is broken and needs fixing.

Pursuant to this priority, the ASBA infrastructure advocacy committee, comprised of trustees Bev Esslinger (Edmonton Public School District), Doug Gardner (Foothills School Division) and Serafino Scarpino (Calgary Catholic School District), requested that Alberta's School Boards be surveyed and asked to identify and prioritize key facility pressure points and promising practices. The results of the survey were to be compiled in a report and used to help guide ASBA member discussion about school infrastructure issues and help shape ASBA advocacy initiatives.

Accordingly, an on-line survey was sent to each of Alberta's school boards in early February 2009 with a March 6 return date. The survey, vetted by the ASBA infrastructure advocacy committee, summarized 11 facility "pressure points" that have been identified through ASBA policy positions or in zone discussions. Boards were asked to prioritize these pressure points and provide any relevant comments. Boards were also provided an opportunity to identify any additional pressure points not referenced in the survey. In addition, Boards were asked to identify promising practices related to infrastructure management in their jurisdiction. In total, 62 surveys were emailed to school boards with fifty four boards responding, either in whole or in part. The high response rate of 87 per cent perhaps illustrates the priority that Alberta's school boards place on infrastructure and its related issues. The balance of this report presents and discusses the February 2009 school board infrastructure survey findings.

Promising Practices

Alberta's school boards, in fulfillment of their fiduciary duty, have adopted a number of exemplary facility management practices. The February 2009 ASBA survey asked school boards to comment on these so that "best practices" could be shared amongst boards. In summary, the following practices are seen as promising by a number of school boards. Some are small steps, others big. All result in increased operating efficiencies.

Energy Conservation Measures

A number of survey respondents pointed with pride at the positive results achieved through local energy conservation measures or adoption of the Leadership in Energy and Environmental Design (LEEDS) silver design standards. Some illustrative comments include:

- > “We have a central computer controlled building management system, resulting in energy savings for heat and light.”
- > “Adoption of LEED Silver as a design standard for school construction encourages energy conservation and quality building design. Three schools have either been built or are being built as LEED projects (Canmore, Okotoks and Drumheller).”
- > “Energy conservation methods and upgrades in our existing schools are and will continue to be a very important practice within our Division in order to reduce significant utility costs. By lowering the costs associated with Electricity, Water, and Gas consumption the resulting savings can be redirected and utilized in areas such as preventative maintenance. At the same time the cost of adoption of LEED standards in new construction must be reflected in the overall funding required to build such a school and programming requirements should not be negatively impacted in order to reduce costs to accommodate LEED.”
- > “We have two schools that have been built with energy conservation measures with the adoption of the LEED design standards. Energy savings have proven to be substantial.”
- > “We have reduced electricity by 31% and gas consumption by 20% over the past 4 years resulting in an overall savings of 3.25 million dollars.”

Security Measures

A number of boards have used technology to improve building security measures and reduce vandalism. Survey comments include:

- > “Installation of card access system in schools. Installation of interior and exterior security cameras to reduce vandalism. Installation of computerized emergency lighting systems.”
- > “Central computer controlled security systems result in increased flexibility and control of systems, reduced loss due to criminal activity.”

Use of in-house Trades Personnel

Some boards noted the cost efficiencies and quality results achieved by using in-house expertise.

- > “Use of division trades people for capital/IMR projects.”

- > “FVSD makes a habit of providing in house project management where possible. The result is expending less dollars on a particular project... By doing so we feel that our building process is more efficient and the dollar is stretched further.”
- > “We produce our own millwork resulting in savings and sturdier furniture.”

Standardization of Building Components

Other boards are looking at standardizing building components :

- > “WRPS has implemented a Sustainable Policy that requires all aspects of our operation do so in an environmentally friendly manner. This process needs to be expanded in our jurisdiction, but we have made a start. It is our intent, over the next year, to develop a Facilities handbook that will identify standards for all school replacement inputs. The intent then is through standardization, for example of a tap, we can have a small inventory thus reducing costs by purchasing somewhat in bulk, reduce "windshield time" of our maintenance staff, while ensuring the replacement part is the most efficient possible.”

Upgrade of Building Finishes

Some boards achieve cost reductions through upgrading building finishes:

- > “Over time we are replacing carpeting in our schools with resilient smooth finishes that reduce allergens, improve cleanability, and save cleaning time.”

Positive Working Relationship With Alberta Education and Infrastructure Capital Branch Personnel

Most boards mentioned the positive working relationship that has been established with Alberta education and Alberta Infrastructure personnel. This positive working relationship, in the view of responding boards, helps cut red tape, improves planning and ultimately reduces costs:

- > “Working with Alberta Infrastructure has been a positive experience. Decisions were made quickly.”
- > “The working relationship with Alberta Education, Alberta Infrastructure and the ASAP Project team has been exceptionally good based upon professional relationships and understanding of each others roles and responsibilities.”
- > “Alberta Education personnel have been very cooperative in providing advice and support as required. We have recently met with our representatives to demonstrate the challenges we (Red Deer) are facing in our schools in accommodating our current student population and the severe problems we will face as growth in the city continues.”

- > “The positive relationship between Alberta Education and school boards makes working through the process easier. In my experience, Alberta Education has been understanding and supportive of our concerns, and has been flexible to allow us to alter designs to meet those needs.”
- > “Our Division does enjoy a very positive relationship with facilities personnel in Alberta Education and Alberta Infrastructure. This makes hearing "NO!" a much more pleasant experience.”

ASAP School Design and Construction Process

A number of boards recognize the Alberta Schools Alternative Procurement (ASAP) initiative as a method of acquiring schools:

- > “Edmonton Public believes the ASAP school design and construction process appears to be meeting the physical needs of construction and delivering cost savings based upon standardization and scale of economies.”
- > “Edmonton Catholic schools is very pleased to be working with Alberta Education and Alberta Infrastructure in receiving three (3) new schools under the ASAP 1 P3 program... We are also very pleased to be receiving a new Senior High School in the Terwillegar neighborhood in the City of Edmonton.”
- > “The level of cooperation between government and the City of Edmonton in ensuring delivery of the ASAP schools has been particularly positive and helpful.”
- > On the other hand - “We believe that the use of “P3’s” exacerbates the provincial infrastructure problem. While debt is kept off the provincial books, the scope and size of projects is reduced. This is due to the fact that debentures can be serviced more cheaply than P3’s can be financed; the difference in cost could be used to fund core construction opportunities.”

Implementation of an Electronic Maintenance Request System

Some boards have streamlined their maintenance request process by using an online program:

- > “We have developed an electronic maintenance request system that makes our Operations and Maintenance Department more efficient. Our Maintenance staff and safety officer tour schools twice a year to review maintenance and safety issues at each school.”

Engaging in a “Value Analysis Scoping Session” with Alberta Education and Alberta Infrastructure

A number of boards note the value present in “Value Analysis Scoping”.

- > “Division recently participated in a "Value Analysis Scoping Session" with Alberta Ed and Alberta Infrastructure to determine the costs / benefits of a downsizing / modernization versus new construction. Very worthwhile activity...The value analysis process for modernization for our Composite High School was very well done and very promising for modernization of schools in the future. A similar process should be developed for new school construction.”
- > “The project scoping process with Alberta Education Capital Planning branch and Alberta Infrastructure expedited the process of capital project approval. It allowed for extensive dialogue and mutual agreement regarding the scope of the project prior to the project starting. This has saved an extensive amount of back and forth disagreement regarding the scope and adjustments along the way.”

Partnerships

Many boards emphasize the virtues and value of Partnerships.

- > “Partnerships, Partnerships, Partnerships. Chinooks Edge School Division has initiated and supported partnerships in various ways over the years resulting in many innovative and exciting opportunities to achieve its goals and make effective use of school spaces. Examples of the partnership arrangements include: • Innisfail Shared Campus with Red Deer Catholic • Fox Run (located in Sylvan Lake) Shared Campus with Red Deer Catholic and Town of Sylvan Lake Recreation Facility • Spruce View School CTS addition jointly funded by the community, the school jurisdiction and Alberta Infrastructure • Carstairs shared campus for school and community library and Community Engagement site • River Valley School (Sundre) shared campus with community library and recreation facility • Community Learning Campus project with Olds College and surrounding communities In each case the specifics of the partnership was very different, in each case the size and scope varied, depending on the needs of the local community and desire for taking advantage of the synergies that could be created through the partnership. While the value has never been specifically denominated, it is estimated that millions of additional dollars would have been required (to achieve similar results) if these synergies had not been recognized and acted upon. Chinooks Edge School Division continues to try to identify opportunities for partnerships that can advance its educational goals.”
- > “Working outside the box to provide programming. e.g. St. Augustine Welding Shop, potential partnership with Wolf Creek Public Schools and Red Deer College to enhance CTS.”
- > “There is a strong consultative and cooperative effort in place between the City of Red Deer, Red Deer Public Schools and Red Deer Catholic Regional division. This extends from joint use of facilities to long range

land planning and school site identification and acquisition. Standards for school sites have been established and incorporated into municipal planning documents.”

- > “We, in Northern Lights, are pursuing a multiplex educational facility with the County of Lac La Biche. This is an excellent example of a P3 project with multiple cost saving potential.”
- > “Peace River School Division has many successful community partnerships. The purchasing consortium for purchasing electricity and natural gas has been very successful.”
- > “There is a willingness to work together with other school jurisdictions and organizations in our community. Examples include developing a Master Facility Plan for our community which included the Public, Catholic, 2 Francophone and a Charter School. We also have partnerships with the Parent Link Centre (provide space for them in an elementary school) and with day cares in our community.”
- > “Partnered with the City of Grande Prairie for additional gymnasium space. This was a once in a lifetime opportunity and at a cost of 6 million for a gym it is difficult to find other partners... We have a unique SCORES partnership with the City of Grande Prairie that allows schools to use city facilities at no cost providing that schools are available for free for city needs.”
- > “The exploration of post-secondary educational partnerships seems to hold promise. This is an early stage development that may provide benefits to students in two ways: advanced standing by completing some post-secondary requirements while still in high school and a fast track to the completion of a certificate or increased preparation for the workforce.”

Modular Classroom Design and Use

A number of boards see the modular classroom concept as a benefit:

- > “The modular program is very good and should be continued. Moving costs and set- up costs must be fully supported in the funding that is available.”
- > “As a division we have embraced the modular concept. In so doing we have completed two successful projects and communities are pleased with the improvements to their schools.”
- > “Province wide expansion of the core modular school design model through P-3 Phases that addresses student accommodation needs in a proactive, efficient and cost effective manner.”

- > On the other hand – “We also feel that the new modular classrooms have proven to be very "inflexible" in their application and we feel there is "more" red tape than when school buildings were a responsibility of Alberta Infrastructure.”

Local Capital Planning Process

Some boards see their capital planning process as instrumental to overall efficiencies.

- > “Local Capital Planning Process - we carried out a thorough and comprehensive needs analysis process that resulted in a fiscally responsible and viable facility plan for a new elementary school and a comprehensive modernization and partial new construction for a jr/sr high school. Eventually, both plans were adopted (almost in their entirety) by the government.”

The recent announcement by the Education Minister, allowing boards to reaffirm their capital plans where significant changes have not been experienced, has acknowledged the efforts of boards along with a need to improve the planning process.

Staff Retention Practices

Some boards have implemented innovative strategies to retain highly qualified facilities staff:

- > “The use of a "stability incentive" or hot market bonus has helped to retain some maintenance personnel such as heavy duty mechanics within the division.”

Pressure Points

The February 2009 school board survey, in addition to identifying a number of exemplary infrastructure management practices, also asked boards to identify and prioritize the infrastructure “pressure points” that they are experiencing.

Some school boards had difficulty establishing priorities amongst the noted infrastructure issues. For example, one board maintained:

“The comment I would make is that by ranking these concerns it may give the impression that once you get past the first 2 or 3 that they are not that big of an issue. This is not the case as I would say our fourth and fifth priority does not differ significantly from the issue we put down as number one.”

In this board’s view, all the identified issues are important and need resolution.

Some boards collapsed the eleven issue statements into three or five overview statements and then prioritized these. For example, one board suggested:

“The above items fall into three general categories: 1. Funding and accessing funding (1,2,3,5) 2. Capital Planning process (4,6,8,9) 3. Technical concerns and frustrations (10, 11,7) Perhaps the issues could be grouped to provide a better categorization of the main concerns or issues. Splitting them up does not get to core of the broader issue.”

Other boards cautioned about putting too fine a point on priorities as these can change with time as local circumstances change. Still others rated some issue statements but not others.

All boards saw the issues identified in the February 2009 survey as capturing key provincial infrastructure pressure points that need resolution. While some added additional thoughts regarding pressure points, particularly adequacy of overall infrastructure funding, and some “rolled up” particular issue statements to more general statements, none challenged the veracity of the identified issues.

What infrastructure pressure points do school boards in Alberta experience and what priority do they ascribe to these pressure points?

Methodology Overview

The issues included in the February 2009 survey were identified by the ASBA Infrastructure Advocacy committee. The issue statements put forward by the committee were then cross referenced to ASBA policy positions, thereby ensuring that the concerns expressed by school boards at annual meetings were generally captured in the issue statements.

An online survey was sent to each school board in Alberta in early February 2009. Each school board was asked to rank each of the 11 identified issues with one(1) being the highest board priority and eleven (11) being the lowest. In addition, boards were asked to provide comments regarding the identified issues and to suggest additional issues that weren't captured in the survey. While the survey asked boards to rate eleven (11) issue statements, two of these related to the effectiveness of the jurisdiction and provincial level long term capital planning and decision making process. For purposes of clarity and discussion, these two related issue statements have been consolidated under the heading “the effectiveness of the current long term capital planning and approval process.”

Establishing Priorities

An overall ranking for each issue was achieved by adding the number of #1 ratings school boards gave each issue.

An analysis of school board survey results indicates that board infrastructure priorities vary markedly by board type and circumstances. For example, the priorities of rural school boards are different from those of urban boards and different again from those of Francophone boards. This, in part, relates to issues like student demographics. Many rural boards, for example, have a declining student population and therefore establish a higher priority on maintaining

existing facilities as opposed to building new ones. Jurisdictions with growing student populations (Metro, Urban, Francophone and jurisdictions along Alberta's highway no. 2 corridor) place priority on providing new schools to growing neighbourhoods that currently do not have schools.

In order to provide a fair and balanced picture of board priorities, and to compensate for the "skewing" effect created by an imbalance in numbers of board types, this report uses both an overall priority rating arrived at by using the mode (the frequency of #1 priority ratings given to an issue) and the mean (average) rating by board type. It must be recognized that the mean is significantly influenced by board types that are more numerous than others.

Discussion of Survey Results and School Board Ratings

Each of the issues rated by boards is discussed in turn. Examples and stories provided by boards to illustrate their concerns are included beneath each issue. In addition, reference is made to relevant ASBA studies or data publicly available in government business plans and annual reports.

Priority Issue #1: The difficulty replacing or preserving aging school buildings

Alberta's children are housed in 1825 publicly funded schools (public, separate, francophone, charter)) with a replacement value of \$16.5 billion. Many of these were built in the 1950's to 1970's to house the post world war two baby boomer generation. Alberta's school boards take their responsibility to maintain or replace these aging structures seriously. They want nothing short of safe and educationally sound facilities for the students under their care. At present they do not believe they can achieve this goal with the funding provided. Some direct school board comments from the survey help illustrate the depth of this concern:

- > "Additional funding is urgently required for Minor and Major Modernization school projects to resolve this issue of replacing or preserving aging school buildings. Delays in substantially addressing the deteriorating infrastructure results in increasing maintenance and custodial expenditures to the extent that it costs more to modernize a building than to replace it totally."
- > "The Board recognizes that there is a great deal of pressure for new capital projects in growing communities, but the province needs to recognize that existing buildings in communities that are not growing at the same rate need to be attended to. Given the excessively long time line that appears to be the case for capital projects for deteriorating buildings in rural communities, the province should consider enhancing IMR funding for older school buildings."
- > "New or modernized/right-sized facilities could result in savings that would actually pay for the infrastructure investment within a reasonable time. If the calculated time of replacement cost is less than 20 years, for

example, then a project should get the go ahead. AB Ed and AI need to support a board's efforts to become more efficient in their building operations and capital costs.”

- > “Every source that is examined indicates 2% of replacement value is required to fund component replacement (IMR funding). With the recent escalation of building values and construction costs, IMR funding is at considerably less than 1%. An automatic escalation factor needs to be included in this funding envelope to adjust for inflation, and as the total area of schools in the province increases, the envelope total needs to be automatically adjusted. Because replacing schools whose only problem is that they are old is at the bottom of the provincial priorities, there is no incentive to maintain old schools. It is more "prudent" to let them deteriorate until they are considered a health and safety problem.”

The Alberta Government's *Twenty Year Strategic Capital Plan* (January 2008) speaks to the importance of preserving existing infrastructure. The plan notes that “maintaining Alberta's existing infrastructure and protecting our investment in these important facilities is absolutely critical” as many of Alberta's infrastructure assets are entering the last one-third of their life expectancy. Additionally, “new infrastructure assets will require proper and regular maintenance throughout their useful life” (p.26).

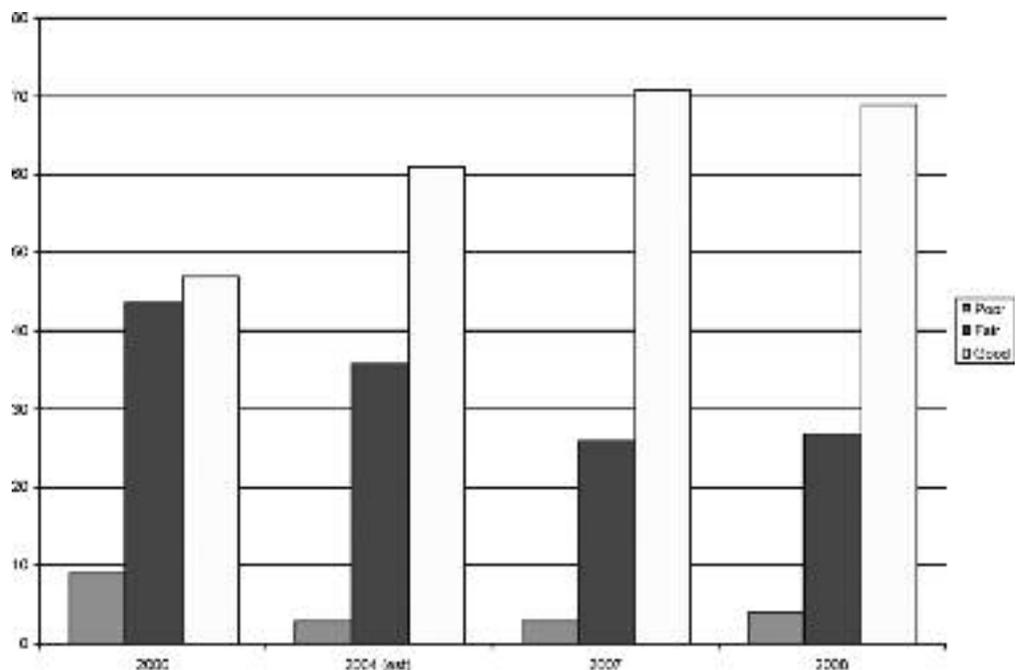
Similarly, the current (2008-2011) Alberta Infrastructure Business Plan, recognizes the need to maintain existing provincial infrastructure as a significant challenge:

The province is challenged to balance the need for new infrastructure to accommodate Alberta's growth, with the need to maintain and upgrade existing capital assets. Regular maintenance protects and extends the useful life of public buildings and other infrastructure. Major repairs can be expected to cost more than routine maintenance, and complete replacement can cost up to five times that of repair. In addition, new infrastructure built to accommodate the province's population growth will create a corresponding and increased need for operating and maintenance funding (p.179).

Alberta Infrastructure monitors and reports on the condition of Alberta's school facilities. The latest school facility assessment (2007-2008) contained in the 2007-08 Infrastructure and Transportation Annual Report (p.51) ranks schools as good (69 per cent), fair (27 per cent) or poor (4 per cent). If this data is compared to historical data (see figure 1), it becomes evident that significant progress has been made in upgrading Alberta school facilities from 2000 to 2006-07. The 2007-08 school year has seen a deterioration of overall facility condition. For example, in 2000, 47 per cent of Alberta's schools were rated as good compared to 69 per cent in 2007-08.

It is also evident that 2007-08 saw a setback in school facility condition ratings and that continued significant investment is needed to bring all Alberta schools to acceptable condition. Seventy one (71) per cent of schools were rated in good condition in 2006-07. This dropped to 69 per cent in 2007-08. Three per cent of Alberta's schools were rated in poor condition in 2004/05 and 2007. This dropped to four per cent in 2007-08. This means that approximately 73 schools require upgrading to comply with minimum codes or standards and deterioration has reached the point where major repairs or replacement are necessary. As concerning is the fact that 27 per cent of Alberta's schools are rated in fair condition. This means that approximately 493 schools are aging and nearing the end of their life cycle requiring additional expenditures for renewal or refurbishing.

Figure 1: Assessment of school facility condition



The ASBA, in its submission to Alberta's *Learning Commission* (2003), maintains that proper funding for the ongoing maintenance of schools is not a luxury but, simply put, prudent financial management. The Alberta government's 1999 Report on a New Facilities Capital Plan suggests that school facility preservation should be funded at two percent of building replacement cost. Using this standard, Alberta's 16.5 billion investment in school infrastructure (Alberta's 20-year Strategic Capital Plan, p. 25) should be secured with an annual Infrastructure Maintenance and Renewal (IMR) investment of \$330 million.

Unfortunately this standard is not being met. Alberta's Budget 2008 (Capital Plan 2008-11, p. 112) provides funding of \$195 million for capital maintenance and renewal. This represents a **\$135 million shortfall from the 2 per cent standard** and underscores the concern being expressed by the province's school boards.

In addition to not meeting current infrastructure maintenance and renewal demand, the \$195 million allocation does nothing to reduce the backlog of deferred maintenance and renewal projects. Alberta Education's five year capital Plan, *Schools for Tomorrow* (2006) estimates that the backlog in deferred maintenance at \$1.6 billion.

Issue #2: School Board efforts to provide school facilities (and modular classrooms) to growing communities in a timely and proactive manner

This issue is driven in part by the changing demographics of Alberta's student population. As noted above, Alberta has increasing populations in metro areas and in major cities and notable patterns of urban and suburban growth in Edmonton and Calgary. The highway #2 corridor between Calgary and Edmonton has experienced significant growth in recent years. Small wonder then that Alberta's Metro, Urban, Catholic and Francophone boards see the provision of school facilities to growing communities as their key infrastructure priority. The frustration felt by many boards as they attempt to meet this challenge is illustrated in the following survey comments:

- > "Alberta Education has not responded to requests for schools in growing communities. Why is Capital funding not an annual budget item? How do we deal with critical enrolment situations?"
- > "This is not only an issue with growing communities, but a general statement in where replacement schools, modernization or right sizing is needed, but unavailable in a timely and proactive manner."
- > "Our pressure point is student accommodation. We stand with an overall utilization rate of about 84%. Our schools in the growing south-east part of the city are at over 100% capacity. Growth is likely to continue, based on our own and Alberta Education's projections. But we are unable to secure funding for a school that is desperately needed. Within one year, we will not be able to accommodate additional students. Funding is required now, as we expect a 2 to 3 year lead time is required to have a school built and operational. • As Red Deer has gone through substantial and rapid growth in the recent past, schools have made changes to accommodate increased enrolments. These have included converting library space to classroom space, converting to mobile computer stations to free up computer lab space, eliminating music and fine arts classrooms, and relocating one school library to the community skating shack. We have reached the end of such conversions in several of our schools, and cannot accommodate future projected enrolment increases without adversely affecting student instruction. • We have continued to stress the importance of new school construction in Red Deer to meet substantial projected enrolment growth. We are very concerned about how we will deal with continued growth with schools running at full capacity and likely a two to three year lead time before a new school can be commissioned."

- > “New schools needed immediately take years to obtain and modernization and preservation of schools can take 15 years before funding takes place. IMR funding is having to be used because it is taking so long. School districts should be able to access a portion of the property tax to enable them to build new schools and modernize old schools. Decision-making should be at the local level instead of constantly lobbying the government. School Districts would then take out debentures through the Alberta Capital Finance Authority with the same control processes in place through Alberta Education and Alberta Infrastructure.”
- > “The process to obtain new space when faced with growing enrolment takes too long, is arbitrary, and there are insufficient funds provided to meet provincial requirements. Red Deer is faced with substantial growth projections (not only our own, but also through Alberta Education’s own Workforce Planning tools), yet we have not been successful in securing approval for a new school which is clearly needed, even without continued growth.”
- > “The acquisition of modular classrooms for emergent needs takes far too long. It is not unusual to take 6 months or more to install these units, since we must wait for construction of the units; even though work concurrently to prepare to transport and installation. Emergent needs need to be able to be addressed in an expedited fashion.”
- > “Because many of the communities we have did not have Francophone Schools, we have a double challenge to deal with: growing enrolment in a growing community. Also, many of the schools we inherit are usually older than newer, giving our schools a "second class" look!”
- > Chinook’s Edge first conducted a study (Yates) in 2000 to determine enrolment trends in River Glen School which is located in Red Deer. Parents were surveyed and the CESD board met with Red Deer public Board. A second study, funded by Alberta Infrastructure (Simera Strategy - Purdy) was conducted in 2003 and examined three possible scenarios for accommodating CESD students who lived around the Red Deer area. Public consultations were held and expectations were raised regarding a replacement school within CESD boundaries with Red Deer Public acquiring a much needed school in Red Deer. A third study commissioned by Alberta Education (Group 2 Architecture 2006) was a joint study of Red Deer Catholic, Red Deer Public and CESD regarding needs within Red Deer and Sector 2. We are now being told that a fourth study including these three boards and the Northern Francophone Board is being planned. The Board of CESD has been clear in its plans to move out of the city of Red Deer where it takes our buses up to 30 minutes to bring students downtown from the edge of the city. CESD and Red Deer public have alternatively had the River Glen replacement

school and turning over of River Glen to Red Deer public as a number one priority on their capital plans. The community believes that this is going to happen and every time it is discussed expectations are raised. Few understand why another study is in order when little has changed. Boards are made to play the fool when government continues to study these situations with no plan to act. A simple “no way” in 2000 would have been more helpful.

- > Our unaddressed need for a new school. A new school in the NE remains the district’s number one “new school/replacement school project” in its capital plan. Issue WD Cuts Junior High School requires a CTS (career and technology studies) Addition. Dates and items of significance gleaned from the file. 1978 – WD Cuts opened in September 1978 as a grade 4-9 school. 1990 – the school received approval in principle from Alberta Education for the addition of an industrial arts and home economics facility. The project was placed on a priority schedule by Alberta Education with construction tentatively approved in the third year of the provincial schedule. 1994 - the project became a casualty of government cutbacks. Both the project and the proposal were cancelled as a new system of building needs was implemented at the provincial level. 1990's - Throughout the 1990's the project remains as part for the district’s overall capital plan. 2000 – Alberta Infrastructure allocated \$10,000 to the district to complete a concept development proposal for a CTS addition to WD Cuts based on previous capital submissions. 2001 – Stephens Kozak Carr and Brown Architects produce the concept development study for WD Cuts Junior High School. November 27, 2007 – Stephens Kozak Architects review the scope of the work and updated the preliminary estimate for the WD Cuts modernization and CTS addition. The project now includes the placement of eight modular units (to be supplied by government) which would replace eight old 1978 portables. Current – the modernization and CTS addition of WD Cuts Junior High remains the district’s number one “preservation/major modernization project” in its capital plan.”
- > “In Brooks and Strathmore both schools are completely out of space. Both communities are in desperate need of new schools. Additional space will not work in either community. How do you choose? Regional planning of community/educational facilities would greatly aid in solving this problem.”
- > “In 2008/09, Alberta education received approximately 420 requests for new Modular units but due to funding, could only approve 105 requests. This leaves a backlog of approximately 315 units. Combined with the 2009/10 orders, we can assume that the order list will be well over 400 units. For Edmonton Catholic Schools, increasing enrolments at some schools and replacement of old portables due to health and safety issues

make it a necessity to have a minimum of 15 new portables for 2009/10. Additional funding for this capital program is urgently needed to address this shortcoming for Edmonton Catholic Schools and for all School Districts.”

- > “Modular Classrooms - The current process and delivery date is 6-12 months late. - Delivered modulars have deficiencies and costs that require rectifying must be borne by the Division. - Current allocations for consultant fees to facilitate the move and place modulars is inadequate thus over run costs must be borne by the Division. We require 6 additional modulars immediately. Explore options for other providers.”
- > “Timely procurement of modular classrooms for growing communities. Many of our schools are well beyond 85% utilization. Allow different firms to produce, via a standard blueprint, modular classrooms. In addition, regional budgets for modulars would help facilitate production and placement.”
- > Alberta Infrastructure has been unable to provide the number of modulars required to augment core classroom spaces, or the funding necessary to relocate existing units on an annual basis. January 2008, we requested 20 modular classrooms and funding for an estimated 56 portable/modular relocations to meet our 2008-2009 school year needs. We were approved for 6 of the 20 new modulars, 2 of which have yet to arrive. As a result we continue to have an ongoing shortfall in classroom space to meet our every day teaching needs. We estimate our cumulative shortfall of funding for portable/ modular relocation at approximately \$1million. - We have been seeking a mechanism and funding for the process of replacing our aging portable classroom inventory. Of our 620 portable / modular inventory we have 175 portable units built in 1984 or earlier. Possible resolution: The resolution requires a recognition of the critical nature of this issue on students and a commitment to fund a resolution.”

Both the ASBA *Metro Study* (2005) and *Small Urban Boards Study* (2006) emphasize the need for school facilities in metro and urban Alberta.

The *Metro Study*, for example, noted Metro boards continue to have many subdivisions without adequate school facilities:

Sufficient capital funding from the provincial government is required to address significant student population growth in 27 new communities in Calgary and Edmonton. The lack of public schools in new subdivisions encourages the growth of private schools in those areas. This enables private schools to attract students and resources because most parents would prefer to have their children attend school in their neighbourhood. The metro boards are placed at a disadvantage due to

their inability to secure funding for new schools in new subdivisions. The absence of schools in new neighbourhoods places an increased burden on the student transportation system, as students need to be bussed to other communities that have student spaces. It also impacts on the sense of community, as the neighbourhood school is often the centre of the community and a source of pride. In their annual report, Edmonton Public stated that one out of every five elementary students resides in a community without a school. The provincial government must recognize the educational, social, economic, recreational, and cultural value of new schools in the developing areas of Calgary and Edmonton (p. 49).

The ASBA *Small Urban Boards Study* (2006) comments on the important need for new schools in Alberta's urban communities:

Population growth is occurring in Alberta's urban areas, particular in the centres surrounding Edmonton and Calgary and the resource-driven economies of Grande Prairie and Fort McMurray. While Alberta's total student population has not changed over the past five years, the distribution of the student population within some of the small urban boards has changed. New subdivisions attract younger families with students and these families expect and demand schools in their neighbourhood. When this is not possible, students must be transported out of their communities to schools in other areas. Of the 27 boards participating in the study, 14 had experienced some decline in student enrolment over the past 5 year period. However, many of the urban areas experienced significant total population growth that resulted in the development of new subdivisions and expanding municipal boundaries. This geographic growth means longer bus rides for students. Without neighbourhood schools, students must be transported from new subdivisions to existing school sites outside of their communities (p. 14).

The *Alberta Education Business Plan 2008-2011* puts a priority on "Schools where students live and learn" (p.6) *The Business Plan* emphasizes Alberta's commitment to providing services to growing communities:

The Government of Alberta is committed to managing growth pressures resulting from the province's thriving economy. For the Ministry of Education, that means working in partnership with Infrastructure and Treasury Board to assess financing strategies for school construction to ensure schools are available where students live and learn. It also means exploring innovative and creative solutions to school infrastructure to ensure students are educated in safe and well-maintained facilities (p. 6).

Given the comments and concerns expressed by school boards in the February 2009 infrastructure survey, school boards are of the view that the Alberta Government has yet to deliver on this commitment.

Issue #3: The ad hoc nature of funding mechanisms and programs

School boards have identified the challenge of managing infrastructure pressures with ad hoc funding. This continues to rank as a major concern for school boards.

Alberta's *Learning Commission* (2003) speaks to the importance of sufficient and predictable capital funding for school boards:

Ensure that sufficient and predictable funding is available to renovate existing schools and build new schools where and when needed (recommendation 22).

Alberta's school boards do not believe that this standard has been achieved. Rural school jurisdictions, in particular, are concerned about the lack of predictable and stable capital funding and see a resolution of this issue as their number one priority.

Some comments from the February 2009 school board infrastructure survey illustrate the concerns of school boards.

- > "Lack of predictable funding and the current Small School by Necessity Funding that is linked to specific sites can have a dramatic impact on POM Funding. We had an increase of one student at one site and three students at another that resulted in a net funding loss of \$239,000."
- > "Base level funding should be stable and not rely on provincial budget surpluses."
- > "Aging infrastructure and the increasing costs of deferred maintenance continue to be our number one concern. This needs to be addressed with adequate, predictable and sustainable funding."
- > "There is a need for a long-term, sustainable and dependable Provincial capital plan. The value of Board capital plans is diminished without a viable Provincial capital plan. The apparent ad hoc nature of capital funding approvals leaves Boards in a difficult, if not impossible, position to be effective in facility planning."
- > "Alberta Education and Alberta Infrastructure want us to have 3 and 10 year capital plans in place, yet they have no plan except "we will have to see what provincial priorities are for the next surplus."
- > Funding for PO&M should be based on square footage, location, RCPA and scarcity. IMR funding has been inconsistent and underfunded. IMR funding should be based on square footage and building age.
- > In the rural context where enrolments are on the decline, the current O&M formula based on student counts alone is providing fewer dollars each year to operate and maintain the same space

- > Battle River would prefer the return of the Modernization Block Funding as this would meet our needs on a more consistent basis.
- > Predictability of funding allows for better and more comprehensive planning. There are many occasions when remedial work has been completed at significant cost in a school, only to have a major modernization announced, throwing good money after bad. We recently received such modernization funding for a school in which we were going to begin such restorative work in Sylvan Lake. The provision of more lead time or the provision of where the project is in the provincial priority list would be useful and would help jurisdictions with their planning needs.

ASBA Zone 2/3 has made the lack of stable and predictable infrastructure funding its key advocacy priority for 2008/2009. In pursuit of this advocacy priority, Zone 2/3 hosted an MLA Luncheon on February 27, 2009. The advocacy goals of the luncheon were:

- To clearly demonstrate, using actual situations, pictures and stories, the need for predictable sustainable IMR funding.
- That every MLA leaves the luncheon with a clear working understanding of the challenges facing School Boards in Zone 2/3 in providing safe, modern learning environments for our students, within the funding provided.

Pembina Hills Regional Division number 7 provides an overview of its IMR funding from 2004 to 2008 to illustrate the erratic nature of this funding. In summary:

04/05 - \$341,600
 05/06 - \$403,081
 06 stub (Apr 1 – Aug 31) - \$267,702
 06/07 - \$1,648,579
 07/08 - \$780,664
 08/09 - \$778,231

ASBA's consistent position is that facility funding should be based on need rather than the province's revenue surplus in any given year. In its 2003 submission to the Alberta Learning Commission, ASBA makes the point that "investing in infrastructure only when the province has a revenue surplus creates a scenario where all sectors ... get money for new buildings at the same time" resulting in competition for the same trades and resources concurrently and thereby driving up construction costs. Stable, predictable and adequate facility funding is needed for proper long term planning."

Issue #4: The calculation and use of utilization rates for schools

A number of school boards, particularly boards that operate both in urban and rural areas, are concerned about the way in which utilization rates are calculated and used to impact funding. For example:

- > “Provincial utilization rate calculations should also recognize all private and not-for-profit tenants and partners that provide services to families and children. Regulations which limit lease-term periods to one-year should be relaxed as an incentive for tenants to invest in school building improvements. These service providers could be granted access to provincial grants and loans to invest in these improvements, through Ministry programs outside of Alberta Education.”
- > “Rural school boards have to deal with lower utilization within our schools. We still have the same hard costs to run our facilities in spite of lower utilization within our schools. With distances between schools in rural Alberta, students have long bus rides already. If schools are closed due to low utilization, student bus ride times become too excessive. 1 1/2 to 2 hours one way to get to the closest school. Currently Alberta Education does not allow us to close or mothball sections of functional schools to increase utilization and decrease operating costs. This concept should possibly be investigated.”
- > “As a remote rural Division having schools that service students that may have a 1 1/2 hr bus ride it is very difficult if not impossible to realign some of our schools with very low utilization. The additional time required to transport would create ride times of an extreme nature. We continue to be pressured by some areas of Alberta Education to deal with low utilization despite this fact and we believe that to be an unfair comment. Those individuals making those assumptions must become more informed and aware of the realities of education delivery in remote locations of the province.”
- > “The existing utilization rate is based on the "old" formula and does not take into account the current AB ED class size standards, which results in a lower calculated utilization rate than "actual". This discrepancy is a major concern.”
- > “What would be extremely interesting to know is what the utilization is truly used for. It is the understanding of WRPS that where a school is utilized less than 85%, capital projects may be less likely to be approved. However, WRPS is not aware of any formal, written government policy as such. It is therefore difficult to know for sure the impact of low utilization rates.”

The ASBA *Small Rural Schools Study* (2001) expresses concerns about the emphasis on utilization rates, particularly in remote regions of Alberta. The report makes two recommendations regarding utilization rates:

1. Decrease the importance of facility utilization and student enrolments in making funding decisions; and
2. Allocate funding for plant operations and maintenance and the Building Quality Restoration Program (now IMR) on real costs instead of the present emphasis on student enrolments.

Issue #5: The effectiveness of the current long term capital planning and approval process

School boards are concerned about the lack of clarity, transparency and feedback in the provincial approval process related to their three and ten year capital plans. In an April 27, 2008 Edmonton Journal article detailing Education Minister Hancock's concerns about the way the province currently plans schools, ASBA president Heather Welwood describes the disconnect between board long term capital plans and the provincial capital approvals:

“Currently, the province decides who receives funding, and its capital plan doesn't have to match districts' individual plans. For school boards, it's like working all year on a detailed priority list only to be left on a whim to see if funding will fall in your lap like a lucky day.”

An April 29, 2008 Edmonton Journal editorial echoes the ASBA president's comments:

“What, indeed, is the point of asking school board administrators to churn out careful capital spending plans if the adults in the education ministry say simply “thanks for sharing”, use them to line the bird cage and then make the decisions they believe are best.”

The following February 2009 school board survey comments further illustrate the concerns of school boards about the provincial capital planning process.

- > “The planning process appears to have little purpose, as the same priorities are submitted consistently with no feedback as to whether our projects are approved, or where they might stand in the queue.”
- > “Boards should have common standards and professional recommendations associated with these standards in order for approval of projects to be made. Approvals should be made on an objective basis devoid of political pressures. Boards should be made aware of where their projects fit in the overall provincial picture in terms of costing and timelines for approval.”
- > “The process has become so politicized that Alberta Education cannot respond in a timely manner.”
- > “The current approval process ignores the reality that more than one project may be of great importance to a jurisdiction. The process should be altered to allow approval of more than one request in a given year to

address the real infrastructure needs of a jurisdiction based upon professional recommendations.”

- > Another concern is that approvals for capital projects (new & major modernizations) seem to be made without adherence to the established criteria, which gives the appearance that approvals are purely "political" in nature. Many Boards have made a considerable investment in concept and long-term plans, with little or no impact on available funding. It would be desirable to know where a jurisdiction sat in the big scheme of priorities, based on the plans presented and their position of importance in the provincial scheme.

In addition to concerns related to decision-making regarding three and ten year board capital plans, school boards question the efficacy of the current capital planning process. For example:

- > “Edmonton Public Schools’ second priority area of concern related to Infrastructure is the process for school capital planning and the lack of predictability and stability of receiving funding for new or replacement schools, or the preservation priorities for aging schools. To address the significant maintenance backlog in our inventory of older school buildings, a commitment to providing an industry standard of 2% to 4% of facility replacement value to school districts annually for capital upgrades and IMR funding would provide predictable funding. School jurisdictions are also required to submit priorities for the capital projects each spring, in the first quarter of the provincial fiscal year. There is no standard to respond or reply to these requests. A commitment to reply to submitted requests would be recommended and would help manage community expectations.”
- > “The current processes do not facilitate good planning. There is no commitment to funding or timelines. A lot of board and community time is chewed up in the various planning and evaluation processes that Alberta Education requires us to go through. Community expectations are playing a greater role in the planning and evaluation process at the local level but it is not realistically acknowledged or understood by Alberta Education.”
- > “Capital Planning is essential, however, it becomes challenging when there is little feedback from the funding agency on the specific capital plans of each school jurisdiction. It can lead to a dynamic tension between boards, the province and local communities. Capital planning could be more effective if there was a clearer view of the big picture. It seems many decisions are made on a political basis, but this may just be a misperception because there is little clarity in current process or priorities.”

- > “We are frustrated with the constant planning for facilities with no results, i.e. approval from the Department. Boards are accountable to their communities to provide education in appropriate settings, where is the government's accountability to provide the resources required to ensure Boards can carry out their accountability to the community?”
- > “It is very difficult for Boards to develop 3 and 10 year capital plans not knowing when or if projects will ever receive funding. Often Boards are forced to use their IMR funding for buildings that are on their capital plans to keep them operational.”
- > “WRPS would recommend that Alberta Infrastructure establish a capital priority list, which is updated annually, so that, like it or not, boards know where their projects are on the "queue".”
- > “The capital planning tool BLIMS has not been well designed to reflect the capital planning needs of school boards. The program needs to better reflect the various needs of school boards relative to new space, modernization, lease space, additions and partial modernizations.”
- > “Capital funding projects which are critically linked to other capital funding projects need to be recognized and processed as such. We have been in a situation where the closure and disposition of one facility is totally dependent on capital funding to complete modernizations of the other two facilities in the community. The Board went through the school closure process for the one school six years ago but cannot complete it because only one of the related projects has been fully funded and the other project only partially funded to carry out the planning work.”
- > “Boards experience a noticeable (almost complete) lack of information or feedback on their capital plan submissions. There needs to be more clarity on what is required, what else is needed to improve the relative position of the request with respect to the provincial priorities. Boards that plan consolidations (e.g. rural boards considering closure of two facilities to be replaced by one) require land and servicing especially if the new site is midway between two villages/towns. This catches the board between its needs and the council of the municipality. The board should not be in a position where it has to find a resolution with another level of government. This could stall a needed project - indefinitely.”
- > “The length of time and continual effort it takes to get projects approved and completed. We have had three specific projects that were approved or approved in principal, then we received money to do an additional study. After much time and consultation with experts, plans were put together and submitted to the government. The government tore apart the plans, asked all the questions that had already been answered in the process of coming up with the plan. In two instances the projects were

delayed 12 and 18 months by the government process which resulted in huge cost escalations. The end result was we built what we had in the plans that were originally submitted, but at an inflated cost to the taxpayers of Alberta due to the delays. Government needs to trust that we have the expertise, knowledge and ability to plan for the facilities that we know we require in our jurisdictions.”

- > “Schools have been on the Capital Plan for Major Modernization or Capital Replacement for many years - at the point where roof replacement/boiler replacement can't be delayed any longer. Dilemma on whether to invest IMR money in a building that may be replaced. Modernization to downsize - or new construction to replace would demonstrate cost-savings in the long term. School Jurisdictions devote time and energy (cost) to preparing and submitting Three-Year Capital Plans and don't hear anything back on them. Why isn't there a similar requirement for Ab Ed and Ab Infrastructure to commit to a Three-Year Capital Plan so school jurisdictions know if they are on the radar when preparing their plans.”
- > “The Harry Collinge High School in Hinton, Alberta story - with sustainable and adequate funding of IMR, small to medium cost projects could be completed without applying for capital planning and support. Waiting for capital approval has cost the province of Alberta 4.3 million dollars. In April 2004 the same project would have cost \$517,000, in 2008 the cost was 4.8 million.”
- > “Boards are required to submit 3 year and 10 year capital plans on a yearly basis and then wait year after year for anticipated approval for new schools. Two years ago, we experienced an increase in enrolment at the elementary level and had to quickly convert any available space in 4 elementary schools to classrooms (this included staff rooms, library and computer space and music rooms and a janitor's room). The department reviewed our situation and provided 4 modular classrooms for the next year to help address our space crunch. The costs of the modulators, along with the additional costs of linking the modulators, are atrocious. One way to address this issue would be for the department to have a province wide planning process which would identify to districts when funding would be received to proceed with new school construction. Districts are required to develop 3 year and 10 year capital plans, why does the same not apply to the Department?”

Issue #6: The lack of funding for school board non-instructional space

Alberta's school boards operate a number of facilities in addition to school buildings. These include structures like maintenance facilities, transportation facilities, and administration offices. In addition, a number of northern Alberta boards own and operate “teacherages” in an effort to recruit and retain qualified teachers in isolated communities. Northland School Division, for example,

maintains 140 of these teacherages for its teaching staff. Unlike operational funding for school facilities, support facilities receive no provincial capital or operational financial support.

A second related aspect to this issue is that school buildings are seen and used as community centres in both urban and rural Alberta. As such they receive significant community use both during the day and after school hours. Alberta Education's five year capital plan, *Schools for Tomorrow* (2006), for example, recommends that school jurisdictions "work with community partners to use educational space in ways that address the individual needs of the learner and of the community at large" and that school boards "explore innovative approaches that recognize the effective use of space beyond the standard instructional day" (p. 4). Such a recommendation is supported by school boards but not without additional maintenance and operations funding to compensate for the additional community use.

The following school board survey comments illustrate the concern boards have:

- > "Edmonton Public Schools' **first** priority area of concern related to Infrastructure is the lack of access to capital and Plant Operating and Maintenance funding for use of our buildings outside of the early education and kindergarten to grade twelve mandate. School buildings are valued community amenities and there is strong community expectation that surplus school space be used for child and family services."
- > "Funding is required for teacher housing due to the remote nature of Northland School Division's schools, and the nearly impossible process of attracting quality teachers without the provision of adequate housing. There is no available housing for purchase or rent in our communities."
- > "Funding for non-instructional space was removed when school board taxation was removed about 15 years ago and has not replaced it. Six years ago an Alberta Infrastructure committee spent an enormous amount of time creating a funding vehicle for non-instructional space. The report went to the then Minister of Infrastructure in October of 2005. Why is Alberta Education still "studying the issue"?"
- > "There is a need in our jurisdiction to replace bus storage facilities that were constructed in the 50s and 60s. Bus sizes are too large for the facilities. Where does the funding come from to address these needs? The same question applies to central office facilities that are necessary to the functioning of the school jurisdiction. The solution likely rests in the province simply recognizing the need and their responsibility to provide the facilities."
- > "Non-Funding of essential site improvements such as parking lots. Alberta Education will not recognize the costs of creating, replacing or

maintaining parking lots except where they are necessary to meet local by-law requirements. Community expectations at rural high schools are heightened by the increasing number of vehicles being driven to school. Costs are high and no support is provided. Possible solution is to allow the use of IMR funds to meet the needs of school jurisdictions.”

- > “Our Board has found it difficult to fund outdoor recreational spaces for new schools. Although some might call this playgrounds it is more than this. Students need a variety of spaces so they can participate in physical education spaces. There is currently no funding allocation for Administration office space or Transportation office space.”
- > “Lack of support for cafeteria spaces in new high school projects suggest that provision be included in the school design manual for food preparation and service areas.”

The ASBA *Small Urban Boards Study* (2006) and Metro Study (2005) both comment on the lack of funding support for non-school buildings operated by boards. The studies note that funds must be taken from other budget areas to acquire and support non-school buildings and that while this issue has been raised a number of times with government officials, no remedy has occurred.

Issue #7: The lack of flexibility to meet community needs with regard to school facilities

ASBA has consistently maintained that the development of education in Alberta has always been a community issue and that the current inability of school boards to access the local tax base has significantly reduced school board flexibility to respond to local circumstances. ASBA has outlined this position in its submission to Alberta’s Learning Commission (2002):

- Losing the power to tax has had many repercussions. In losing the power to tax, **school boards have lost a critical connection to their communities.** They no longer have the ability to raise funds to respond to community priorities or local needs.
- **School boards have lost authority.** The province provides school boards with all funding for education. School boards have no control over the amount of money available to spend on local public education.
- **They have lost the ability to respond to provincial funding cutbacks** by taxing at a local level. The result has been greater reliance on school-based fundraising.
- **They have lost a critical accountability link.** School board decision making is confined to the expenditure side of the budget—a situation that raises red flags for economists. Without the power to tax, it is too easy for school boards - like parents, teachers and taxpayers - just to point at the province and say, “Give us more.” It would be better to say, “We agree this is a local priority. We will raise taxes to launch this program.” (p.24)

The importance of local flexibility was raised by a number of boards and is illustrated by the following comments:

- > “The identification of Infrastructure needs requires a different lens when comparing urban and rural school divisions. In the Fort Vermilion School Division a school serves as a community resource and as a result the facility is used for many other non-educational services. In the urban areas there is access to many other facilities to serve non-educational purposes. Therefore, rural schools require different funding levels for construction, operations and maintenance and for IMR. Schools in rural areas need to be built to serve a greater community need.”
- > “There is a need to provide for design flexibility within the core school design parameters, to allow for customizing schools to meet community and district needs. We are concerned that the core design concept may not allow for this as it stands.”
- > “Pressure on the core of the school, when there are a high number of portables attached. Core services such as washrooms, storage, gymnasium facilities, library, administration space, etc. were all designed to service the needs of the population for the "core" school. When a school requires portable space due to increasing enrolment, core services are not increased at the same rate and thus increasing demands are placed on those core services and schools are forced to make due. Resolution: Replace two-thirds of the portable classrooms with permanent classrooms and additional core services such as washrooms and storage.”

Issue #8: The lack of provincial funding for the facility and equipment costs associated with provincial initiatives such as the new occupational health and safety requirements

School boards continue to express concerns about “unfunded mandates”. For example, key points raised by school boards on the infrastructure survey include:

- > “Edmonton Public Schools’ fourth priority area of concern related to Infrastructure is the cost to meet the new and emerging requirements in provincial regulations, particularly Occupational Health and Safety standards in the areas of air quality, hazardous materials, audio devices, as well as building code changes.”
- > “Our rating for #5 goes far beyond Occupational Health and Safety. We are continually creating and relocating office space/parking lots for division employees who manage provincial initiatives.”
- > “Issue #1 Occupational Health and Safety. Although not necessarily directly related to facilities, the provincial legislation that is to be met requires significant funds to meet. Everything from man hours to equipment. If OH&S is this important to the province there should be a formula used to provide funding to school boards to assist in meeting the OH&S legislation.”

Issue #9: Site preparation and servicing costs as well as issues with land use and zoning

This issue was raised in the *ASBA Metro Study* (2005) as an example of a developing trend of municipalities to download municipal costs to school boards:

It was noted that there has been a downloading of certain municipal costs on to the metro boards. This has occurred recently in Edmonton where the Edmonton Public School Board was assessed approximately \$320,000 to cover the cost of land drainage. Edmonton Catholic has experienced similar City of Edmonton assessments. Prior to the creation of a utility for land drainage, this service was funded through the tax base and schools were exempt. Now a user fee is charged and the costs are passed on to the Edmonton boards (p.42).

Several boards raised this issue again in the February 2009 infrastructure survey:

- > “Edmonton Public Schools’ fifth priority area of concern related to Infrastructure is the emerging trend by municipalities to request school project budgets to absorb costs for replacement utility services and improve roadway infrastructure along school frontage to meet municipal bylaw requirements. There has also been a trend to move services previously covered through property taxes to a utility based fee approach (Drainage Utility Fee). School districts are expected to either absorb these new utility fees within their current budgets or request the funding from the province. There has also been consideration in Edmonton to apply a rate cost for arterial roadway construction to all lots in new subdivisions, including future school and municipal reserve lots.”
- > “The current Municipal Government Act (MGA) provides little or no power for school jurisdictions to deal with land issues related to facility procurement. This needs to change.”

Issue #10: The current school closure process

The question of school closure, “rightsizing” and consolidation has been a point of contention for many school boards and communities in Alberta. Alberta’s school boards believe in the important link between schools and their communities. This belief was articulated in the ASBA submission to Alberta’s *Learning Commission* (2002):

In the inner city or in the country, schools are the glue that binds communities together. They are a meeting place and a learning place for the entire community—not just those members of school age. Even when their enrolments are low, schools fulfill an important social and socializing role. The implications of closing such schools must be carefully considered (p.15)

Despite this belief, school boards are often forced, for financial efficiency reasons, to examine school closure and consolidations. School boards in Alberta, for example have closed approximately 20 schools per year for the last three years. While boards are prepared to deal with school closure issues as necessary, they would like to reframe this issue from a “lose-lose” scenario to a “lose-win” scenario so that funding would be provided for a “positive” outcome of school closures, such as a new or renovated community school. The Edmonton Public comment from the infrastructure survey perhaps best illustrates this position:

- > “Edmonton Public Schools’ third priority area of concern related to Infrastructure is the school closure regulation. The current regulation does not provide flexibility in developing and proposing innovative and comprehensive solutions to the issues of school sustainability. School jurisdictions should have more authority to set policies and guidelines for consultation requirements. Predictable funding for possible school consolidations, including school alterations or replacement schools models, could help advance discussions to a level of what collective communities might gain rather than focusing beyond what a community may feel it is losing.”

Other Issues

The February 2009 survey asked school boards to identify any other infrastructure issues of concern to them. Many boards responded to this question. Some of the responses provided further elaboration of the ten issues identified in the survey. Others touched individual circumstances in individual communities. Still others emphasized the need for adequate funding for POM and IMR. Responses are perhaps best summarized under the following pressure points:

Adequacy of Funding (funding sufficiency)

Most school boards raised the need for sufficient funding to properly manage the building, maintenance and operation of schools. Some boards made the point that Alberta could achieve predictability in funding or improvements to the capital planning process but without adequate funding, improvements in processes would be hollow. The plea for sufficient funding is illustrated by the following school board comments.

- > “Plant Operating and Maintenance (PO&M) funding is insufficient to heat, clean and maintain schools. Suggest that funding be provided based on the area of square meters of buildings rather than on a per student basis • Issue: Even with recent increases to IMR funding and modernization / preservation project funding, there is a significant maintenance backlog in our inventory of older school buildings Suggest a commitment to providing an industry standard of 2% to 4% of facility replacement value to school districts annually for capital upgrades and IMR funding • Issue: Even with the provincial technology grants, there

is insufficient funding in furniture and equipment budgets to properly outfit new schools, especially for technology items. Suggest that furniture and equipment budgets be based on a standardized amenity list for classrooms and spaces, and that funding be provided specifically for this as opposed to being funded as a percentage of a total school construction budget.

- Issue: A significant pressure area is the appearance of interior and exterior spaces, with insufficient funds to maintain a reasonable painting program. Painting is not considered eligible for IMR funding. Suggest that additional funds be provided for PO&M to support major painting projects, or allow major painting programs to be funded through IMR.”

- > “Underfunding of Furniture and Equipment in Capital Approvals. The allocation for furniture and equipment in capital projects does not provide the school with the furniture and equipment it requires to open on its first day. In addition, we have been advised that items typically included in the construction budget such as lockers and boot racks, should also be funded through furniture and equipment, especially if the construction budget is challenged. This just makes the problem worse as lockers are purchased instead of necessary furniture and equipment to operate the educational program. Additional money should be allocated to ensure adequate furniture and equipment is available for the educational program. The amount should be increased between 2% and 4% of the current allocations.”
- > “It is more efficient to properly fund projects and incur the entire scope of the work while the contractor is on site as opposed to phasing in a project over a period of time. A number of years ago the district completed the modernization of Lorne Akins Junior High School. Due to a lack of financial resources the modernization could not be totally completed at one time. It cost considerably more in the long term to complete the project in phases.”
- > “Funding for operations and maintenance and IMR projects is insufficient to keep up with the requirements of operating aging buildings. One of our elementary schools is 23 years past its optimum service life and currently requires \$160,000 in roof repairs. This will consume a huge chunk from the IMR budget as a "stopgap". Additional funding for O&M, IMR and/or "right sizing" initiatives would help.”
- > “IMR is intended to replace life-cycle components such as flooring, roofing, lockers etc. The challenge for us is that the majority of our buildings have been built in the 1950-60's and have not seen a full-scale modernization. The factors of age, not having schools modernized levies a heavy burden on IMR funding. 12 of our 20 schools fall in this non-modernized category. Updating of obsolete electrical panels, main transformers to the building and outfitting or replacing current digital

control systems and installing web-based direct digital control. This is a very costly venture, but not replacing them results in not being able to communicate any longer now that the schools are using Supernet instead of modems.”

- > “Roofs are a general concern with a jurisdiction of our size. We can generally only afford sections of a roof at a time, as we do not get enough IMR funding at any one time to address all of our IMR priorities. A complete roof for many of our schools would cost on an average of \$400,000 to \$500,000. There are other priorities that are equally important in the division, so we determine the critical sections of roofs and get these done during the particular IMR year of funding.”
- > “Site finishing, landscaping, playfield development are underfunded. Approved gymnasium square footages are usually less than adequate, as well as gymnasium storage and general storage areas.”
- > “Northland School Division is unique in that it encompasses many square kilometres over the northern half of the Province. Available funding limits the amount of available manpower, and with the Maintenance staff having to spend many of their working hours travelling the long distances to the school locations, this consequently puts a strain on their time management in getting required work completed in a timely manner. In the northeast sector of the province, Northland has to compete with the high salaries being offered by the oilfield industry, in order to attract and keep qualified Maintenance Personnel. In the remote areas, Northland has to provide and maintain teacher housing, as there is little or none available within the settlements. Without the provision of housing, there would be no teachers. In the Fort McMurray area of the Province, heavily subsidized housing has to be provided in order to keep quality teachers, as local rental rates are exorbitant.”
- > “The issue is that IMR funds are utilized more and more to address items arising as a result of the age of a school. As a school ages the IMR funding allocation should increase incrementally to account for these issues. This would allow for maintaining the building until such time as modernization or replacement could be facilitated.”
- > “A bigger concern is that when a project is approved, there is no adjustment to the capital budget for increased estimated construction costs during the time lag between the budget announcement and tender closing.”
- > “IMR funding -- insufficient and not predictable from year to year. With the lack of funding we are using a band aid approach -- only part of what really needs to be done is addressed. Audits done are not being followed as with inadequate funding plans cannot be adhered to. It

seems as though we are losing ground in upkeeping our facilities so in a few years we will be in a serious situation.”

- > “Adequacy of funding in our operations and maintenance budgets and the need to increase IMR allocations. We have 10 less staff members in O & M than we had in 1995 with over 120,000 additional square feet to maintain. Costs for utilities and for custodial services has severely limited the dollars available for regular O & M. Competing for contract services in a heated urban marketplace has been radically limited the number of projects were able to complete with IMR funding.”
- > “Northern construction factors - due to living in the north, cost estimates for building in the north are quite high due to the anticipation by contractors that building in the north will cost much more. However, due to the rapid rise in costs to build in the north, northern divisions risk the loss of approval of projects from Alberta Education due to tight financial times. Therefore, northern school divisions are disadvantaged. As a board we wonder if a percentage factor could not be built into each project so that contractors would know the expected cost increase for building in more remote areas. The result would that contractors would bid on a new project as if it were in an urban center and then the percentage factor would be applied to deal with building in more remote places. The result would be clear picture of what it means to construct in more remote areas as compared to building closer to an urban center.”

Lease Funding

Concerns with lease funding and the timing of such funding was of concern to some boards.

- > “We operate 6 schools which we lease from third parties. We have applied for lease funding, but we are now 6 months into the school year and have not received approval or funding for any of these leases.”
- > “With schools of choice we have issues with being limited to access lease funding if there is space in another school. The issue is there could be space based on current formulas for utilization, however, the number of empty classrooms for a school of choice to operate out of is non existent. This issue could be resolved by making it easier for boards to obtain lease funding by considering how many empty classrooms there are to be used for a school of choice.”

School Safety Issues

Some boards raised concern about student safety issues:

- > “Projects submitted based on student safety issues should not be delayed based on a priority list. We are still waiting for movement on our request for modernization to St. Michael's School in Pincher Creek - a school that has been described by the RCMP as impossible to secure.”

Staff retention Issues

Other boards raised concerns about staff retention issues.

- > “The attraction and retention of qualified, competent maintenance/custodial staff has been a challenge over the past three years. We have moved from contract employees to division employees hoping that the additional benefits might attract better employees, however this has been met with limited success. Our division is also investigating arrangements to receive foreign workers to staff these positions.”

IMR and POM Allocation Formula

Still others commented on particular aspects of the IMR and POM allocation formulas.

- > “As a rural board with a number of schools in communities with small student populations, the way in which IMR and POM is funded poses a challenge. There are a number of schools in rural areas that have relatively large areas with small populations. Although the formulas for POM and IMR recognize square area, the formula continues to be weighted heavily on per pupil funding. This does not recognize that costs associated with POM and IMR are more directly related to area than to population attending the site. For example, utilities, grounds maintenance and facility upkeep through IMR are constant, regardless of student population in the school. We recommend that the formula give more recognition to constant costs associated with size, not population. Rural areas do not have the economy of scale.”
- > “PO& M funding should be based on meters not enrolment. It is unrealistic to expect Boards to address utilization issues without providing capital dollars.”

Construction Standards

Some boards questioned current construction standards.

- > “Construction standards for schools seem to be inferior to other government buildings such as courthouses, hospitals and post secondary (i.e. more drywall less masonry - this may be short sighted in communities with only one school) We have a 40 year old block school and a new school with no block - it is probable that the older school will cost less to maintain and look better longer.”
- > “If the province wants Public buildings to be "green" they need to provide the capital funds necessary to allow boards to design/build "green" buildings. On a similar note, if schools are to be built to last, as they were in the 70's, block walls, seamless flooring systems etc, the capital for this should be allocated, i.e. pay now or pay later.”

Program space funding

A number of boards expressed concerns about adequacy of school space to house current programs.

- > “CTS space is a significant issue. The facility limits the courses that can be offered. In small rural high schools this becomes an economy of scale. Discrete spaces for individual courses is not reasonable. A solution is to provide adequate square footage for flexible spacing.”
- > “We have a need for a modular CTS unit to travel to schools in our rural areas. Providing us with funding for a CTS modular unit would assist us.”
- > “Today’s technology far exceeds what was installed in classroom construction in the 1950’s. Classrooms built in 1950 would have 1 to 2 electrical receptacles in the classroom, whereas today with computers, projectors, multi-media installations, there is a need for many more receptacles as well as increasing the power load to the building to accommodate the extra electrical requirements.”

Competition between Boards

One board raised the issue of competition and conflict between boards regarding school space

- > “Competition between boards (public and separate) in small centres and rural areas at times appears to be an “uneven” playing field. For example, Clearview being ordered by the province to turn over a closed former elementary school that is presently being used as a Board Office and provides Clearview Schools with use of gymnasium space to a separate board.”

Conclusion

School boards are charged with a duty to “provide and maintain adequate real and personal property” (School Act, section 95). They take this legislated responsibility very seriously. At present, Alberta’s school boards are facing two competing priority challenges, maintaining and upgrading an aging school infrastructure and providing new student spaces in rapidly growing communities. Like Minister Hancock, they believe that the current method of providing schools to the provinces children and the adequacy of this funding is broken and needs fixing. Alberta’s school boards support the three key priorities outlined in Alberta Education’s Five year capital plan and are committed to working with the Alberta Government to achieve these priorities.

Alberta school boards appreciate the co-operative working relationship they have with Alberta Education and Alberta Infrastructure. “Surely, the decision-making process”, asserts an Edmonton Journal Editorial, “should be a collaborative venture between the level of government that embodies the responsibility the whole province has to each child, and the body chosen by the local community that represents more closely the child’s parents and their friends and neighbours” (Edmonton Journal Editorial, April 29, 2008).

Given this mutually interdependent relationship, Alberta’s school boards feel obligated to present the facts and challenges of the current infrastructure situation. School boards believe their input is honest and representative of the reality facing Alberta school boards. This information would benefit Alberta Education and other impacted stakeholders regarding the accomplishment of mutual infrastructure priorities. School boards are committed to working together, recognizing the time to act is now.

At the end of the day, school boards want all of Alberta’s children educated in a world class education system with supports.

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