



Alberta School Boards Association

Joint Use Agreements and School Site Planning

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Weaving Partnerships



The graphic features several thick, colorful ribbons (blue, green, red, black) that are woven together into a braid. The ribbons enter from the left and are braided together as they move towards the right. The background is white with a blue curved shape at the bottom.

Weaving Partnerships
JUNE 6 & 7, 2016
SHERATON RED DEER

SGM 2016

Value of Collaborative Partnerships

- Amongst provincial associations
- Provincial-local interaction
- Locally between school boards and municipalities



Project Committee Representation

- Alberta Education (host)
- Alberta Infrastructure
- Alberta Municipal Affairs
- AUMA
- AAMDC
- ASBA
- ASBOA



Selected Recommendations

- Long-term integrated planning
- Joint-use **and** planning agreements



Education Act

- Has received royal assent
- Still to be proclaimed
- Two Key Words:
 - ▶ Collaboration
 - ▶ Engagement



Municipal Government Act

- Consultations 2012-2014
- MGA Review: Summary of Input and Issues
- MGA First Reading: May 31, 2016
- MGA Proclamation: fall 2017



Modernized Municipal Government Act

- Regional cooperation and cost-sharing of services
- Creation of collaboration frameworks
- Formal agreements or arbitration

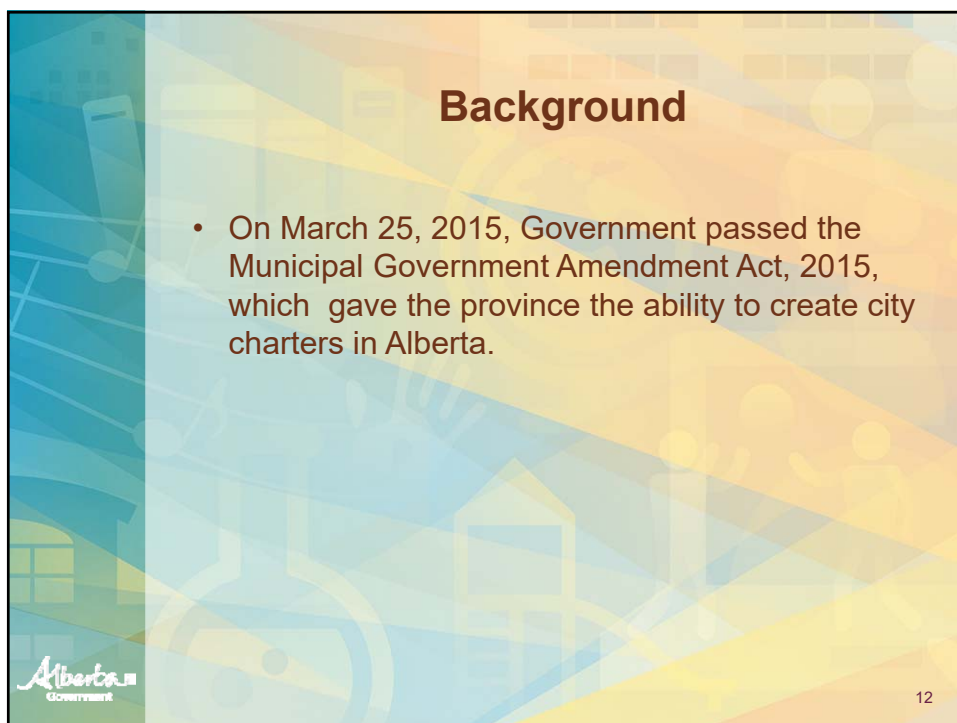
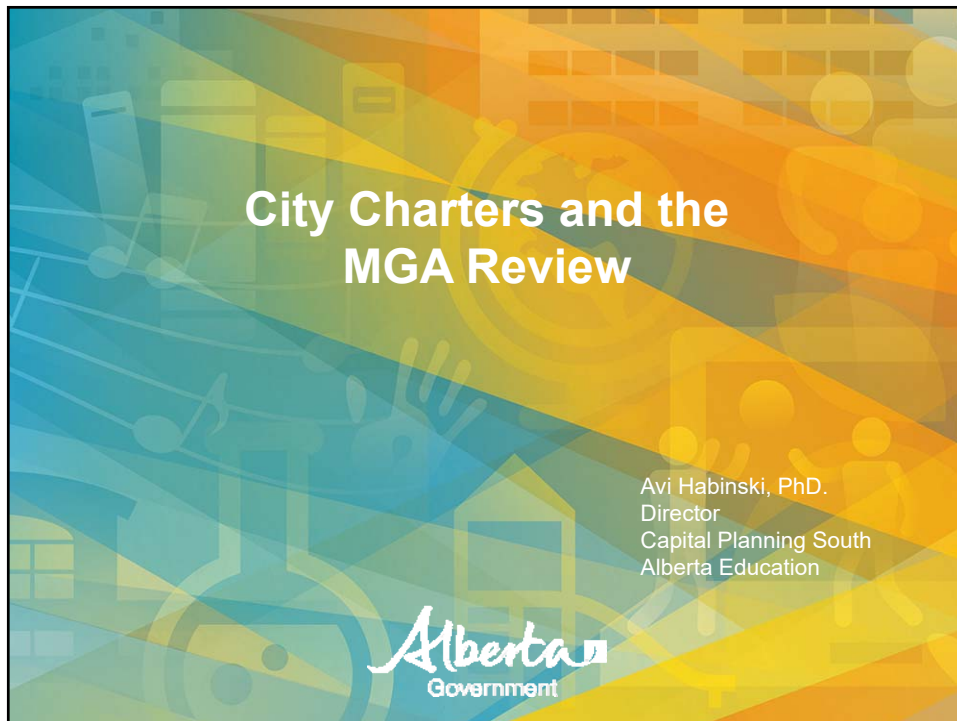


Education Infrastructure (OAG)

- 2011-14 Announcements
 - ▶ Phase 1: 35 new schools
 - ▶ Phase 2: 50 new schools and 70 modernizations
 - ▶ Phase 3: 55 new schools and 20 modernizations
- Budget 2016



Historical opportunity for
working together!!



City Charters

- Phase 1** **Addressed matters specific to the two cities and Municipal Affairs.**
- Phase 2** **Addressed matters between the two cities, Municipal Affairs and other GOA ministries.**
- Phase 3** **Development of a new fiscal framework based on changing roles and responsibilities.**

Phase 2

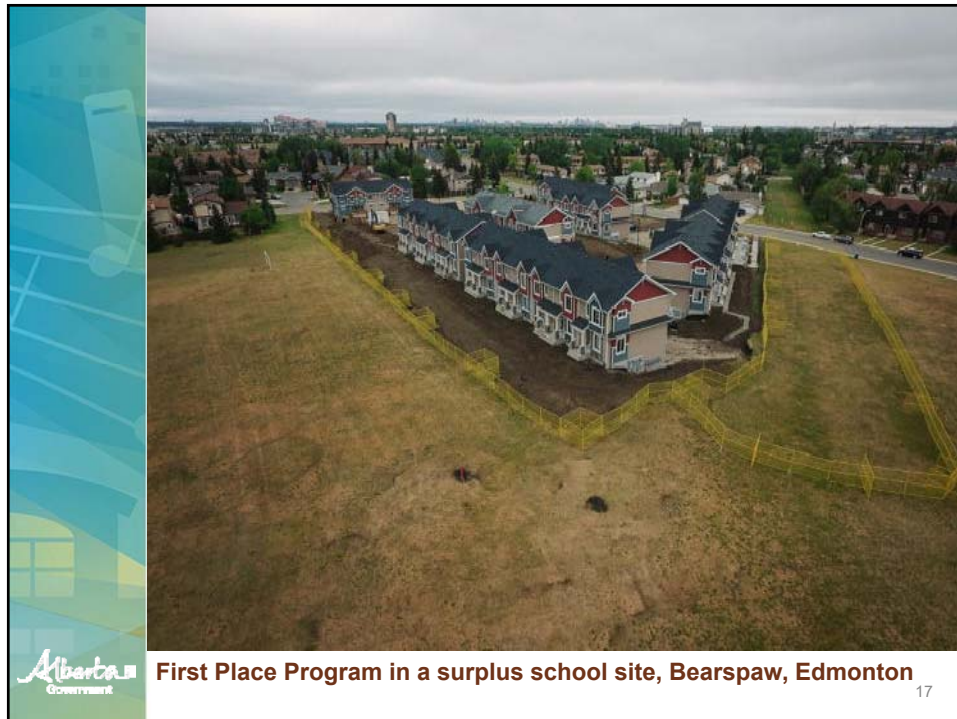
- **Addressed policies in areas such as planning, environment, social issues, transportation, energy and the economy.**

City Charters

- **City Charters** are being developed for Calgary and Edmonton.
- Stakeholder engagement on City Charters is being planned for the Fall 2016.
- The City Charters are enabled under the MGA.
- **Separate process:**
e.g., MR is being discussed in the context of Charters, no changes to MR proposed in MGA.

The Use of Municipal Reserve Land

- The intended outcome of the discussions between the GOA and the cities is to use reserve land more efficiently. Items being discussed are the role of a charter city in:
 - Determining appropriate public benefit uses on reserve land.
 - Setting a maximum for school uses within the 10% dedication.
 - Involvement in location and footprint of schools as integral part of design and success of a neighbourhood.
 - Developing a meaningful partnership between the charter city and the school boards regarding school closures.



Issues Raised by School Jurisdictions

- **Maximum size of school sites,**
- **location,**
- **school design,**
- **permitted use of municipal reserve and;**
- **school closure.**

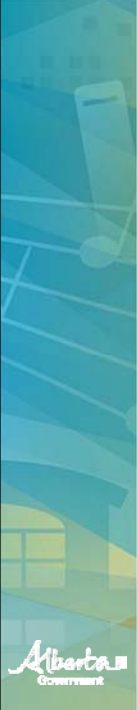
Alberta
GOVERNMENT

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Responses from the School Districts

- Issues identified should be brought to Joint Use Coordination Committee (JUCC) for resolution.(collaborative approach).
- Greater authority may be a disincentive to collaborate.
- Student learning may be sacrificed for other interests.
- The size of sites should reflect program needs.
- School design would address footprint and number of stories.
- Boards should decide about school closure.

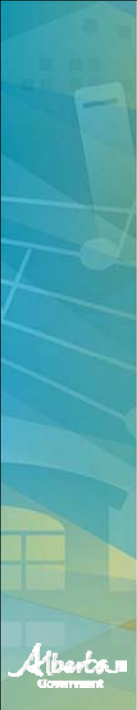
- The Calgary boards and the City are reviewing the 31 year old Agreement with the view to create a framework for addressing issues identified in the charter cities. These matters are being collaboratively explored by the cities with participation from Alberta Education.



MGA

- **Municipal Affairs is inviting input over the summer prior to seeking approval in the fall 2016.**
- **20 public sessions are being held in June and July.**
<http://mgareview.alberta.ca/get-involved/>

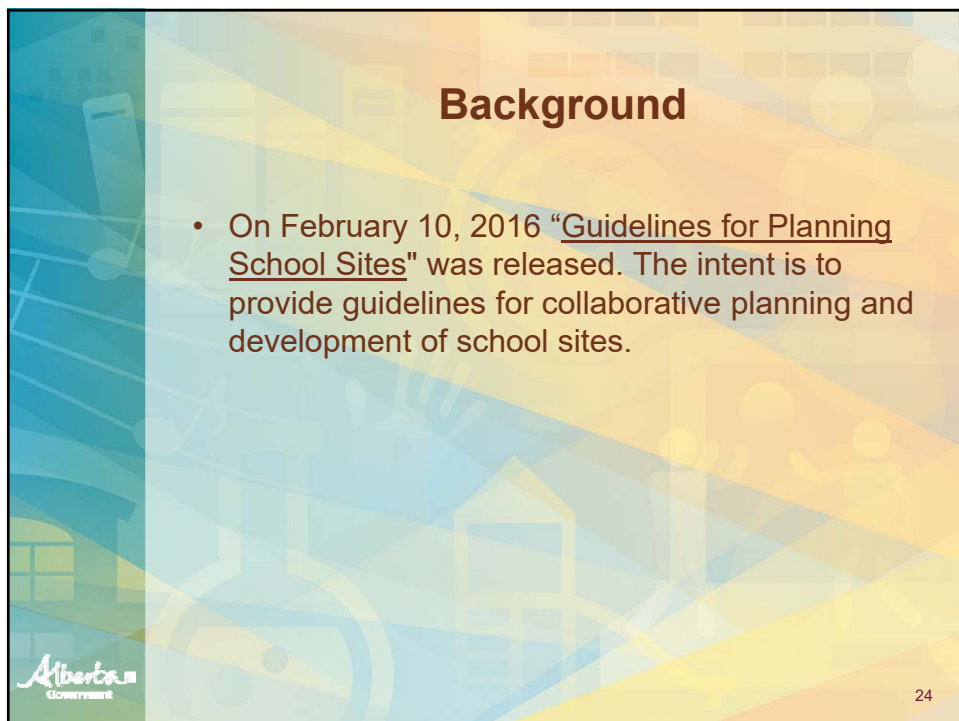
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MGA (CONT)

- **There are No proposed changes to the MGA that have a direct impact on school boards**
- **Key matters that may be of interest to boards:**
 - **Off-site Levies.**
 - **MA is aware that boards may have concerns**
 - **They will be discussed further in the summer**
 - **A dispute resolution mechanism will be created**
 - **Inter-Municipal collaboration.**

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Committee representatives

- **Government of Alberta: Education, Infrastructure and Municipal Affairs**
- **Alberta Urban Municipalities Association (AUMA)**
- **Alberta Association of Municipal Districts and Counties (AAMDC)**
- **Alberta School Boards Association (ASBA)**
- **Association of School Business Officials of Alberta (ASBOA)**

Selected Guiding Principles

- **Community assets**
- **Authorities must collaborate**
- **Roles and Responsibilities clearly defined**
- **Partnerships maximize the benefit**

Input from Stakeholders

- **School Jurisdictions**
(sessions in Edmonton and Calgary)
- **Municipalities**
(sessions in Lethbridge, Airdrie and Leduc)

Input from School Jurisdictions

- **No standards** for size and quality of school sites
- **Relationships vary** markedly
- **Concerns about off-site levies**
- **School Reserve insufficient** for high schools

Concerns with School Sites

- Topography (slopes, swamps)
- Serviced sites (e.g., water, sewer, gas, access)
- Size of site
- Soil problems (e.g., contamination, organic material, stockpiles on property)
- Developed playing fields (clarify responsibilities)

Consequences of School Site concerns not being addressed:

- Project delay
- Unanticipated construction and maintenance cost
- Project cancellation
- Relocation to another site

Input from Municipalities

- Consistent and predictable funding (e.g., 3 to 5 years commitment)
- Clear legal obligations for provision of school sites
- Larger schools on smaller sites
- Commitment to a Joint Use Agreement results in collaboration

Recommendations


1. Integrated planning of school sites.
 - School jurisdictions and municipalities collaborate in the development of their respective plans
 - The government commits to a predictable funding model
 - The site readiness checklist will be completed in consultation with the municipality

Recommendations (cont.)

2. Review joint use and planning agreements. Create agreements where they do not exist.
3. Provide guidelines to clarify roles and responsibilities and outline best practices.

Agreements – what could they include?

- Acquiring land for future schools and standards for school sites (consider other community services)
- Responsibilities for site development and maintenance
- Access agreements for facilities and playing fields
- Collaborative mechanisms
- Disposition of surplus school land



City of Lethbridge
and
Lethbridge School District No. 51
and
Holy Spirit Roman Catholic
Separate Regional Division No. 4

Joint Use Agreement



History and Background

- Joint Use Agreement came into existence in 1959
- First of its kind in Alberta
- Maximizes utilization of tax-funded facilities (both schools and municipal recreational facilities)
- Schools benefit from access to city-run facilities at little or no cost to themselves
 - example: skating rinks, swimming pools, and theatre centers
- Community groups are provided, during non-school hours, with free or affordable access to many school facilities, such as gymnasiums, lecture halls, and meeting rooms
- City of Lethbridge maintains separate Joint Use Agreements with other School Boards including the Conseil Scolaire Francosud

Community Use of School Facilities

Rationale

By making school facilities available during after school hours, citizens of Lethbridge receive increased access to recreational opportunities.

Policies and Procedures

The City of Lethbridge Recreation, Parks, and Cultural Development coordinates all bookings during the school year including:

- Booking requests from the community and allocation of space/time
- Working with schools regarding availability and confirming bookings with schools and community groups
- Providing billing and collection services for all rentals
- Compiling statistics and producing annual booking reports

Availability of Facilities

Both School Districts make gymnasiums and meeting rooms available to the community:

- Weekends/holidays (8:00 am - 9:30 pm)
- After school on school days (5:00 - 9:30 pm at Elementary Schools; 6:30 - 9:30 pm at Secondary Schools)
- School activities have priority over community use

Use of Equipment

- Schools provide sports nets
- Individual groups are responsible for their own balls and activity equipment

Supervision

- At the time of booking, community groups are required to provide the name of one person who is responsible for supervising the participants before, during, and after the booking

Cancellations

- No later than 48 hours in advance of the scheduled time
- City booking office notifies head caretaker of the school

Security

- School doors open 15 minutes prior to activity
- Groups must vacate the premises 15 minutes after their booked time

Caretaking

- School Boards arrange for caretaking
- Caretaker is present during all scheduled community activities
- School Boards attempt to have caretaking duties coincide with scheduled bookings
- Any use outside regular caretaking hours requiring caretaking, requires District approval and is covered through monies collected from bookings

Restrictions

Activities not permitted by community groups in school facilities or on school grounds:

- Public dances or weddings
- Private social events (including birthday parties)
- Games of chance, lotteries, gambling, or fundraising events
- Indoor soccer
- Floor hockey
- Any alcohol related events
- Smoking

In addition, facilities may not be used for commercial purposes by businesses or private institutions.

Insurance

City of Lethbridge provides a blanket coverage for all user groups that book through the administration offices.

Cost Sharing of Net Deficit or Surplus

At the end of each season, revenues are first used to replace any worn out equipment as agreed upon by the Joint Use committee, with remaining revenues returned to the respective School District.

In the past, this was done as a 50/50 split of revenue between the School District and the City of Lethbridge, but was modified in the April 2013 update.

School Access to City of Lethbridge Facilities

Rationale

To provide Lethbridge schools with access to City of Lethbridge facilities for educational purposes (when these facilities are not provided for community recreational programs and activities).

Policies and Procedures

Availability

- Schools shall have access, free of charge, to specified city-operated facilities during the day for educational purposes (8:00 am - 3:30 pm)

Scope

- Applies to all Lethbridge schools participating in the Joint Use Agreement

Priority Use

- During the school day, priority use of City facilities is normally given to school activities



Supervision

- School personnel are responsible for the adequate supervision of all activities

Booking Procedures

- Schools book City facilities directly with that facility

Rental Fees

- No rental fees for schools during the day when use is for educational purposes
- Fees may be charged for special instruction, extra lifeguards, or additional supervision and equipment



Grounds and Open Space Management

Rationale

To avoid duplication of equipment purchases and to maximize the efficiency of grounds maintenance. Both parties share the cost of school ground maintenance and the costs of annual special maintenance items, such as play apparatuses and fencing.

Policies and Procedures

Shared Maintenance Costs

- Expenses incurred in maintaining school grounds in jointly-developed sites are shared through a formula agreed to by all parties in the Joint Use Agreement

Annual Special Maintenance Requests

- Special maintenance projects are channeled through the Joint Use Facilities Technical Committee for consideration during the annual budget process
- City maintains the grounds “out of the back door” and Boards are responsible for maintaining the front of the buildings

Infrastructure Development Rationale

To allow opportunities for the City of Lethbridge and School Boards to cooperate in the development of school grounds and new capital projects.

The Agreement Provides:

- A forum for discussing the long-term plans of both the City of Lethbridge and the School Boards
- A mechanism for securing future school sites in new development
- Opportunities for the City and the School Board(s) to share in new construction (or to cost share in the renovation of existing school facilities)

Policies and Procedures

School Site Acquisition

- The City, working with the School Boards, identify schools sites and together, work towards providing the best sites possible

Joint Development

- The City and School Boards may jointly develop mutually agreed-upon schools or grounds
- Each Board participates in development of their own facilities

New Capital Projects

Submission of New Projects

When a school or community group wishes to propose a new project under the Joint Use Agreement, it shall do so by notifying, in writing, the secretary-treasurer of the school district involved. All letters shall be submitted on or before December 31st of each year and will provide a brief description of the proposed project.

Criteria

The Joint Use Committee shall determine whether or not the proposed project meets the following criteria:

- Project provides a resource presently not available within the neighbourhood unit
- Project will provide modification to an existing resource which will make it more functional
- The development concept has a minimum life span of five years from final completion with minimal maintenance and operating costs incorporated into its design
- The proposing school or community group is willing to contribute financially towards development costs

Committee Structure and Communication Joint Use Committee

The Joint Use Committee that oversees the Joint Use Agreement, and makes decisions within the agreement, has the following duties:

- Recommending financial and operational policies to the Boards and the City
- Developing regulations to implement adopted policies
- Advising and communicating with those involved in plans for the development of new facilities or major renovations to existing facilities
- Submitting an annual budget for all jointly-funded projects and programs
- Coordinating the work of the Joint Use Facilities Technical Committee as described below
- Implementing the terms of the Joint Use Agreement
- Other duties as assigned

Committee Structure and Communication Joint Use Committee

This Committee is made up of two members from each school district and two members from the City of Lethbridge, including:

- Associate Superintendent of the Holy Spirit Roman Catholic Separate Regional Division No. 4 (or their designate)
- Plant Operations Coordinator of the Holy Spirit Roman Catholic Separate Regional Division No. 4 (or their designate)
- Associate Superintendent, Business Affairs, Lethbridge School District No. 51 (or their designate)
- Manager of Operations and Maintenance of Lethbridge School District No. 51 (or their designate)
- Director of Community Services for the City of Lethbridge (or their designate)
- Recreation and Culture General Manager (or their designate)
- Parks General Manager (or their designate)

Joint Use Facilities Technical Committee

Composition

- One representative from the City and one representative from each Board
- Chair appointed by members
- Chair calls meetings as may be necessary and keeps meeting records

Functions as Instructed by Joint Use Committee

- Submit, each year, an operating budget for the consideration of the Joint Use Committee relative to such areas of joint use as the Committee may be instructed to consider, including capital and maintenance projects
- Create a list of priorities for special maintenance projects and recommend upgrading projects in areas of the Committee's responsibility
- Follow budget approval, supervise the development and maintenance of the areas assigned to the Committee, including budget control
- Advise on technical aspects of various proposed developments
- Have a design prepared, and prepare an estimate of costs of capital development of any site or facility
- Committee representatives are responsible for communications to their organization regarding outcomes and decisions

Regarding Construction of New Schools

- Provincial funding formula sets infrastructure parameters such as gymnasium size
- These parameters may meet school requirements but not community needs or facilities for sports competitions
- In the spirit of the Joint Use Agreement, and to benefit students and the community, the City of Lethbridge directs municipal funds towards enhancement of new schools
- The City of Lethbridge has provided funding to enlarge elementary school gymnasiums
 - example: \$750,000 to expand the new Copperwood Elementary School by 200 m²
- Size of school sites are decided between the City and the School Board in a collaborative way
- Many school sites are a combination of school sites and city parks, so are larger
- Boards have title to the school building site and joint title to the rest of the school site

Challenges

- Ensuring principals understand the Joint Use Agreement and its benefits (not allowing use of facilities unless booked through the City)
- Finding caretaking for weekend activities
- Additional operating costs to School Districts with schools operating evenings and weekends (gymnasium floors have to be refinished twice as often, and lighting is costly)
- Demand by the community is greater than the space available

Success Factors

We have a Vision

All partners are dedicated to serving the cultural, educational, spiritual, emotional, and recreational needs of our community.

We have an Operational Process

A long standing agreement which includes committee structures, policy, and procedures.

We have a Spirit

A spirit of collaboration and working together as equal partners understanding that any idea is worth exploring and can create efficiencies to enhance opportunities for the community.

Chinook's Edge and 14 municipalities
(2 counties, 12 towns and villages)
Reserves Agreement



Principles

- Use of and disposition of reserve lands
- Use of cash in lieu of reserve lands and accounting
- Optimize services for the benefit of residents



Principles (cont'd)

- Equitable sharing of costs associated with coordination
- Land use practices mutually beneficial
- Right-sized, right-located school reserves



Questions?



