
School capital manual for the 2023/24 school year









School Capital Manual for the 2023/24 School Year | Alberta Education




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PREAMBLE

Alberta Education (Education) has developed the *School Capital Manual for the 2023/24 School Year* as a resource for school jurisdictions (not including private and federal schools) to develop their understanding of their roles and responsibilities regarding the prioritization, implementation and funding of approved school infrastructure projects. This manual also provides details to develop their three-year capital plans. School jurisdictions develop their Three-Year Capital Plans to build or improve the facilities that will help shape the educational experience of students today and in the future.

This edition of the *School Capital Manual* supersedes all previous editions.

Chapter 1

Introduction

1.1 Purpose of the *School Capital Manual*

Education is responsible for developing the *School Capital Manual*, approving funding related to school operations and maintenance, and developing policies and education program standards.

The *School Capital Manual* is intended to serve as a guide for school jurisdictions by:

- Providing a convenient reference for policy and processes applicable to the planning, approval and implementation of education infrastructure projects.
- Providing guidelines and minimum standards for the preparation of capital funding requests, capital plans and associated planning documentation.

Educational Spaces of the Future

The priority of Education's capital program is to develop and implement policies, plans and strategies to support school capital planning, manage the prioritization for funding of school capital projects and, in collaboration with Alberta Infrastructure (Infrastructure), manage the implementation of approved capital projects.

As planners of school facilities for Alberta's growing student population, Education and its partners have the challenging responsibility of creating and maintaining safe, functional, and technologically advanced educational spaces where students can explore ideas, exchange information and identify new ways of working and living in the ever-changing education environment.

1.2 Legal and Policy Framework

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

1. Acts

- *Education Act*, Statutes of Alberta, 2012, c E-0.3
- *Choice in Education Act*, 2020, SA 2020, c 11
- *Municipal Government Act*, RSA 2000, c M-26

2. Regulations

- *Disposition of Property Regulation*, (Alberta Regulation 86/2019)
- *Borrowing Regulation*, (Alberta Regulation 83/2019)
- *Charter Schools Regulation*, (Alberta Regulation 85/2019)

3. Other Documents and Agreements

- *School Capital Manual*
- New West Partnership Trade Agreement (NWPTA)
- *Funding Manual for School Authorities*
- Guide to Education
- Memorandum of Understanding between Education and Infrastructure
- Canadian Free Trade Agreement (CFTA)
- Canada-European Union Comprehensive Economic and Trade Agreement (CETA)

1.3 Summary of Changes

The table below reflects significant changes made to the *2023/24 School Capital Manual*. Minor grammatical and formatting changes have been made, but are not included in the table.

	Topic	Change	Location
Revised	Summary of Changes	Updated based on 2023/24 changes	1.3
New	Capital Planning Funding	Added a new subsection to clarify the types of funding approvals for capital projects	2.3
Revised	Protocol for Provision of Space for Charter Schools	Clarify the Furniture & Equipment Grant allocation formula and allocation criteria for Charter school authorities	4.1
Revised	Maintenance and Renewal Programs	Added clearer instructions regarding quarterly reporting requirements for CMR projects	15.4
Revised	Contacts	Updated key contact phone numbers and job titles.	Pg 73

1.4 Significant Dates

Who	Responsibility	Date
Alberta Education	MCP funding allocations communicated to school jurisdictions.	Approximately January of the following school year.
School Jurisdictions	Submission of lease funding request to Capital Planning	March 1 of each school year.
School Jurisdictions	Submit Forms 14 & 15 to Infrastructure – detailed cost of any relocation, facility improvement to accommodate new modular and modular links	End of March each year.
School Jurisdictions	Three-year capital plan submission to Education.	April 1 of the year before the scheduled start of the plan.
School Jurisdictions	Capital project requests.	April 1.
Alberta Education	The annual IMR funding allocation is scheduled for release.	April.
Alberta Education	Disbursement of first allocation of CMR funding.	May.
Alberta Education	Inform school jurisdictions of approved lease funding.	June 30.
School Jurisdictions	CMR per project reporting (Quarter 2)	August.
School Jurisdictions	Three-Year CMR Plan Budget Submission	September.
Alberta Education	Provide lease funding support to School Jurisdictions.	September 30.
Alberta Education	Last disbursement of CMR funding to School Jurisdictions.	September.
School Jurisdictions	Submit updated Small Scale Plans, Data sheets and Instructional Area Forms for all new schools and changes to existing schools.	October 15.

Who	Responsibility	Date
School Jurisdictions	Submit Modular Classroom Program Request Form.	Early November.
School Jurisdictions	Modular Classroom Program Request Submission.	November 1.
School Jurisdictions	Submit detailed IMR statement of actual expenditures for the previous school year to Alberta Education.	December 31.
School Jurisdictions	Submission of Statement of Final Costs for MCP projects.	Within six months of the completion of the installation and set up.
School Jurisdictions	CMR Program Level and Substituted Project Reporting (Quarter 4)	March.
School Jurisdictions	CMR exception reporting (Quarter 1)	May.
School Jurisdictions	CMR Statement of Final Cost and VFA update.	June.

Chapter 2

Capital Planning Process

2.1 Provincial Capital Planning Process

The Government of Alberta (GOA) uses a province-wide consolidated capital planning process. The purpose of this process is to identify current and future capital needs, and to develop strategies to address those needs in alignment with the GOA's prioritization criteria.

Each ministry has a unique project delivery mandate and must develop the criteria, methodologies and strategies to fulfill that mandate, measure success and work for continuous improvement. While each ministry's criteria must align with government's overall prioritization in order to fulfill their mandate, each ministry may place different emphasis on the GOA criteria.

Each ministry evaluates and prioritizes its capital project needs using its program delivery criteria when developing their Ministry Capital Plan. In addition to evaluating the importance of a project to meet program delivery mandates, another critical factor for inclusion in a ministry's annual capital plan request is the readiness of the project to move forward in an effective and timely manner after approval. For Education, this means that the school jurisdictions must either have a suitable, serviced site, or there must be a suitable site identified with a written commitment from the municipality to provide and service the site before the scheduled start of construction. Any required access roadways and services need to be installed by the municipality prior to tendering school construction.

Once the individual ministries have completed and submitted their Ministry Capital Plans, the provincial Capital Planning team consolidates the requests of all ministries. Projects are then evaluated from a provincial standpoint for criticality, readiness, alignment with government priorities and with consideration to the available budget allocation. The projects approved by Cabinet become part of that year's Provincial Capital Plan.

2.2 Education's Capital Planning Process

School jurisdictions are required to submit their capital project requests to Education by the April 1 submission deadline each year, unless otherwise communicated in writing by Education's Capital Planning team. Education's Capital Planning staff review and evaluate project submissions using the ministry's criteria for program delivery, as outlined in Section 2.5 and 2.8 of this chapter. Education staff provide recommendations to the ministry's senior leadership team, including the data and risk analysis, project drivers, readiness, rationale, and criticality of each project requested for possible inclusion in the upcoming Ministry Capital Plan.

Once the Education Minister reaches a decision, Education finalizes and submits the Ministry Capital Plan Submission to the province-wide process for consolidation, further evaluation, and funding consideration.

When Education is advised by Treasury Board and Finance of the capital requests approved for funding, approval letters are prepared and sent to school jurisdictions.

2.3 Capital Funding Programs

There are four types of funding programs for approved school capital projects, which are designed to support projects as they progress through the stages of the capital planning process – Pre-Planning, Planning, Design, and Construction.



School authorities are not required to complete each stage chronologically before receiving construction funding. Depending on readiness and ability to complete the required steps prior to construction, projects may accelerate at different rates. The most appropriate funding program is selected for the approved school project based on an evaluation of the school authority's capital plan submission.

2.3.1 School Pre-Planning Funding Program

Pre-Planning Funding is provided for school projects to support the early identification of future capital needs. Funding through the Pre-Planning Program is intended for projects that are anticipated to increase in priority in the next three-to-five years and would benefit from preparatory work, such as value scoping studies or functional planning, community and stakeholder engagements, or site fit analysis. The Pre-Planning Funding Program supports school authorities in advancing projects out of a conceptual phase and can determine practical next steps, where applicable, to address a future capital need.

2.3.2 School Planning Funding Program

Planning Funding is provided for school projects to support project readiness through site investigation work, further development of project scope and partnership opportunities, or clarify potential risks and identify mitigating strategies. The Planning Funding Program focuses on smaller-scale projects and aims to prepare school projects for a smooth and swift transition to the Design and Construction stages once final funding is approved.

Note: In working with their local municipality and communities, some school authorities may progress project readiness activities on their own. In those cases, it is possible some project requests may not require funding support from the School Planning Program and the projects may advance directly to the Design or Construction stages. For authorities that need additional resources to complete planning activities to advance their priorities, the School Planning Funding Program will assist and allow for more efficient project delivery.

2.3.3 School Design Funding Program

School Design Funding is provided for school projects to complete front-end project work, such as the procurement of consulting teams (e.g. architectural firms), preparing construction tender documents, or

permit application activities. Design Funding is intended to address impacts to project timelines, scope, and budget. It is not necessary for all projects and is typically provided for complex projects with longer timelines and or a high cost.

2.3.4 School Construction Funding Program

School Construction Funding is provided for school projects in the final stage of development following tender. Construction Funding supports the construction of new infrastructure or expansion, rightsizing and/or demolition of existing infrastructure. The aim of Construction Funding is to deliver projects in a timely fashion. Thorough pre-planning, planning, and design activities cost overruns and other project delays can be mitigated in the early project development process which would better position projects for consideration of Construction Funding.

2.3.5 Modular Classroom Funding Program

Modular Classroom Funding is provided for approved project submissions to address emergent enrolment pressures, programming needs, address health and safety issues, or replace portables at the end of their service life. Alberta Education is responsible for the administration of the program, overseeing the evaluation, prioritization, and approval of modular classroom requests. Alberta Infrastructure is responsible for implementation of approved requests. Funding is dependent on provincial funding allocation. The submission process is separate from 3-Year Capital Plan and outlined in further detail in Chapter 12.

2.4 Ten-Year Facilities Plan

The Ten-Year Facilities Plan provides a broad overview of a school jurisdiction's existing facilities, including age, condition, historical and current utilization, and anticipated needs as a result of projected changes in enrolment and facility condition. It assists school jurisdictions, Education and Infrastructure to identify trends affecting long-range facility requirements and strategies to support the school jurisdiction's planned program delivery.

School jurisdictions are required to develop a Ten-Year Facilities Plan, and should be prepared to submit this plan to Education upon request by Capital Planning staff. Each school jurisdiction should review its plan annually to confirm that it is up to date, relevant and that it aligns with their Three-Year Capital Plan.

The Ten-Year Facilities Plan is to include the following information:

- an overview of key strategies and objectives for the next 10 years or longer;
- the school jurisdiction's expected utilization rate, historical, current and projected enrolment (increase in enrolment that may lead to additional space being required or decrease in enrolment that may lead to closure of programs or school buildings);
- modernization and/or replacement needs;
- need for new schools or addition to existing schools;
- grade structures and forecast of program changes requiring capital funding either under the modernization program to convert existing space, or construction under the expansion program to facilitate the new program(s); and
- facility condition evaluation information.

2.5 Three-Year Capital Plan

Each year, school jurisdictions must assess their school capital needs and prioritize proposed projects based on the project drivers outlined in Section 2.6. The Three-Year Capital Plan must be approved by the board, and the board's meeting minutes must identify the dated version of the plan that has been approved.

There are typically hundreds of project requests made to Education each year. In order for Education staff to appropriately understand and assess the criticality of each project, it is important that project requests are clear and complete, and that substantiating data is provided.

Project requests are prioritized with consideration for the following criteria:

- the need has been clearly defined and is supported by data and evidence;
- the scope of work has been clearly defined;
- the educational solution is important to meet the mandate of program delivery for the school jurisdiction and for the ministry;
- there is alignment between the estimated timeframes for the project delivery and the need for the project solution;
- the project would be able to move forward expediently if funding were approved; and
- site readiness in alignment with the municipal, provincial and federal guidelines and regulation where applicable. Please refer to section 2.7 for further information on Site Suitability.

2.6 Project Drivers

The following information defines the project drivers under which consideration is given:

Building Condition – These are demonstrated and documented deficiencies in the major building components; structural deficiencies; building envelope issues; deficiencies and/or issues with the interior mechanical and/or electrical components; building code and/or standards compliance issues that could not be resolved with available Infrastructure Maintenance and Renewal (IMR) funding.

Community Renewal – School capital projects that contribute to the redevelopment and sustainability of a school community and/or surrounding neighbourhood. These projects will promote efficient use of space within a community or surrounding neighbourhood.

Efficiency Solutions – School capital projects that provide operational efficiencies through the modernization, replacement or consolidation of existing space to provide a more optimal learning environment where the available space is more aligned with the student enrolment.

Enrolment Pressures – The school jurisdiction's existing facilities are insufficient to accommodate current and future students within a specified geographical area.

Functionality and Programming – Projects provide new and/or improved program space functionality through reconfiguration, relocation, or technology. Examples of issues may include the lack of functional

capacity to deliver the curriculum in the intended manner, ease of supervision, lockdown capability, sound and light quality, etc.

Health and Safety – Projects that address risks to the health, safety, or security of the students or staff either immediately or in the longer term; projects that address compliance issues with federal or provincial legislation or municipal bylaws.

Legal – Projects are evaluated on legal rights for equity of access and assessed regarding existing legal judgement or potential legal action (e.g. Rights to francophone education under Section 23 of the Canadian Charter of Rights and Freedoms).

2.7 Capital Project Requests

School jurisdictions are required to submit individual project requests into the government's web interface for each of the top priorities identified in their board approved Three-Year Capital Plan, in order to have the project considered by Education staff for possible inclusion in Education's Capital Plan submission.

Project requests that qualify for submission to Education must:

- be consistent with the approved Capital Plan (i.e. same project type, scope, grade configuration, capacity and priority);
- appropriately classify requests into one or more of the following five categories:
 - new school;
 - addition to an existing school;
 - modernization of an existing school;
 - replacement school; and or
 - solution.
- include in sufficient detail the required and relevant data outlined in the respective schedule for the project type (Refer to section 2.8)

NOTE: If the project scope or project need is not yet defined clearly enough to allow the required supporting data to be gathered and provided in the submission, this indicates that a capital project submission may be premature and additional planning work is required. Consultation with the appropriate capital planning manager is recommended, as it is not possible for ministry staff to evaluate a project that does not have a clear scope, a clearly defined rationale and description of any risks associated with its implementation.

2.7.1 Possible Partnerships

Schools serve as important hubs within communities. School jurisdictions are encouraged to pursue potential partnerships with local municipalities that would mutually benefit both the students and the local community.

School jurisdictions are expected to have an executed statement of commitment with any partners at the schematic design phase, and fully executed funding agreement prior to pre-tender stage.

School jurisdictions should contact their capital planning manager in Capital Planning for any additional information on developing partnerships.

2.7.2 Development of a Project Budget

Infrastructure develops the estimated project budget based on the project scope and data provided by Education and the school jurisdiction. It is critical that school jurisdictions provide a clear definition of what is in, and out, of the intended scope for the project with particular attention to any unusual or potentially costly components. This should limit the risk of in-scope items being removed during design because of unanticipated or uncommunicated project costs. It is important to identify scope of work and costs that are not (or will not be) covered by the project budget or site risks/considerations that may impact the project implementation, such as: any lack or limitation of services or access to the site, federal, provincial and municipal requirements, environmental and hazmat issues, geotechnical or structural issues, specific building components that are critical to the planned educational programming (e.g.. specific CTS labs, joint use spaces), requirements on a heritage building.

School jurisdictions should provide additional confirmation that municipalities are supportive of the proposed project and that there are no impediments to immediate commencement of the project.

In addition to evaluating the need for each capital request, Education ministry staff cannot recommend a project for inclusion in the Ministry Capital Plan submission without the availability of a suitable and ready site. Refer to section 2.7.

2.8 Site Suitability

In order to support school jurisdiction's assessment of the suitability of proposed sites, a completed Site Evaluation Checklist (SEC) must be included with each project submission. The guideline for completing this document is called the "[Guidelines for Site Work for Projects to be submitted with the ThreeYear Capital Plan](#)" ([Guidelines for Site Work for Projects](#)). Together, they provide the detailed requirements for a risk evaluation of the proposed site, its suitability, and the supporting documentation to be provided by school jurisdictions. They also contain information that could assist school jurisdictions in their work with local municipalities, provincial and federal government.

School jurisdictions should submit project requests where there is a clearly defined need. If the school sites are not available, school jurisdictions are encouraged to work in collaboration with the local municipality and education partners in procuring a suitable school site.

A project that is a high priority for a school authority can and should be submitted in the school authority's Three-Year Capital Plan submission even if there is no available site for the project. Although Education cannot recommend a project for funding without a viable site, the capital planning sector could assist the school jurisdiction's work to support the resolution of site issues.

Much of the initial site evaluation work should be completed prior to the capital project approval stage (level 1 & level 2 of the "[Guidelines for Site Work for Projects](#)" to be submitted with the three-year capital plans) to ensure that a project is able to proceed in an effective and timely manner once the approval has been given.

The project approval to school jurisdictions may be staged and contingent on specific milestones being met. There may be a staged project approval with design funds only depending on level of site risks identified and the need of the project, which would be defined through the capital plan review process. The approval of construction funding may not be provided until the design has sufficiently progressed and all site risks have been mitigated.

At pre-approval stage, school authorities should identify the funding source to proceed with necessary site investigations, if recommended.

The completion of the site evaluation checklist is required to ensure:

- potential sites for new, replacement, addition and modernization school projects do not cause delays that could have been addressed prior to start of construction; or
- any potential issues related to change in building footprint, expanded site servicing and construction; and maintaining the safety of staff and student during the increased site demands of the construction period are identified.

2.9 Capital Project Request Checklists

2.9.1 New School

The data listed below identifies the information school jurisdictions should consider including in their project proposal for a **new school** in order for the need and urgency of the project to be assessed:

- The name of the school. If unknown, at a minimum, the name of the neighbourhood or legal address and geolocation of the site where the proposed school will be constructed should be provided.
- The main project driver(s) for the new school referred to in section 2.6.
- The list of the names of all the school facilities currently serving the students that this new facility is intended to serve must be submitted for each individual project. These are considered impacted schools, as their population will/could be affected when the new school opens.
- The current and five-year historical adjusted enrolments on each of the impacted school facilities.
- Map outlining the location of the site as well as all of the impacted schools within the same geographic sector. This will include the distance and travel times between the impacted school(s) and the new site.
- Busing information, including average ride times, if students are currently bused from their resident neighbourhood to a designated school outside their sector. Also, identify the expected impact on the affected schools and any plans for these schools if the new school is constructed.
- Evidence that alternative strategies have been explored and deemed not feasible and/or not effective, including but not limited to the following:
 - grade reconfiguration
 - boundary adjustments
 - transportation
 - use of other facilities in the community

- enhancing technology in schools (e.g. videoconferencing and distance learning)
- identifying possible partnerships in the community and/or sector
- program changes/relocation (e.g., for programs of choice)
- modular classrooms or permanent additions on existing schools
- The planned grade configuration for the proposed school. Also, identify if there are plans to initially open the facility serving a different set of grades and how many years/grades would be affected in the gradual implementation. (example: facility will serve Grades 10-12; however, in Year 1 – only Grade 10 will be offered, with Grades 10 - 11 offered in Year 2 and Grades 10-12 offered in Year 3).
- The five-year projected enrolment and utilization of the impacted schools.
- The projected enrolment at the new school upon opening and five years after opening.
- Any capital projects approved for the jurisdiction (whether in design or construction) for schools serving the same general area that will/could affect the utilization of the impacted schools. Current issues with existing programming and transportation and how the new facility is intended to resolve or mediate these issues.
- Available data from the municipality regarding development plans for the area, including:
 - status of current development – how much of the area is already developed
 - anticipated timelines for neighbourhood to be completely developed
 - housing starts – number and type of building permits issued over the past three years and anticipated over the next five years
 - any other relevant data that will define educational space requirements
 - number of students the area is expected to generate
- Other relevant statistical or anecdotal information that lends support to the jurisdiction's rationale of why this project is required, particularly if the statistical data does not accurately provide the full rationale or does not support the request as made.
- Site readiness checklist and supporting documentation (See Section 2.8)

2.9.2 Capital Project Request – Addition to an Existing School

The data listed below identifies some of the information that school jurisdictions should consider including in their project submission for an **addition to an existing school** in order for the need and urgency of the project to be assessed:

- The name of the school, location, current grade configuration and the main driver(s) for the addition. Please refer to section 2.6. Also indicate if the addition will result in added grades or just added capacity.
- The list of the names of all the school facilities currently serving the students that this new facility is intended to serve must be submitted for each individual project. These are considered impacted schools, as their population will/could be affected when the additional spaces become operational.
- Map outlining the location of the site as well as all of the impacted schools within the same geographic sector. This will include the distance between the impacted school(s) and the school proposed for an addition.

- Whether all additional instructional capacity will be occupied upon opening or if occupancy will be phased.
- Any other capital project currently approved for the jurisdiction (whether in design or construction phases) serving the same general area that will/could affect the utilization of the impacted schools.
- Evidence that alternative strategies have been explored and deemed not feasible and/or not effective, including but not limited to the following:
 - grade reconfiguration;
 - boundary adjustments;
 - transportation;
 - use of other facilities in the community;
 - enhancing technology in schools (e.g. videoconferencing and distance learning);
 - identifying possible partnerships in the community and/or sector;
 - program changes/relocation (e.g. for programs of choice); and or
 - modular classrooms added to existing schools.
- Current issues with existing programming and transportation and how the new space is intended to resolve or mediate these issues.
- Data from municipalities regarding plans for neighbourhoods still in development which the facility serves, including:
 - status of current development (e.g. how much of the area is already developed);
 - anticipated timelines for neighbourhood to be completed or developed;
 - housing starts (e.g. number and type of building permits issued over the past three years); and
 - any other relevant data that will define educational space requirements.
- Relevant statistical or anecdotal information that lends support to the jurisdiction's rationale of why this project is required, particularly if the statistical data does not accurately provide the full rationale or does not support the request as made.
- Any third-party reports on facility condition and/or hazardous materials assessment.
- Information about students bused from their resident neighbourhood to designated schools outside of their sector. Include reasons, numbers of students, and average ride times.
- Additional capacity being requested with the addition.
- Indicate if any sightlines within and outside the facility pose any challenges for supervision.
- Identify and explain any of the following that are issues in the existing building:
 - adequacy of classroom sizes and availability of flexible workspaces;
 - existing or emerging functionality and programming issues in the building that compromise the school's ability to deliver mandated education programs;
 - existing, emerging, or potential significant health and safety issues;
 - circulation concerns within the building;
 - security concerns with administrative suite location in terms of ability to monitor visitors and students;
 - concerns related to acoustics/quality of sound (e.g. students ability to easily hear teachers without noise disturbances);

- lack of natural light access in instructional spaces; and or
- insufficient number of classrooms to deliver the existing programming and future programming.
- Site readiness checklist and supporting documentation (See Section 2.8).

2.9.3 Capital Project Request- Modernization to an Existing School

The data listed below identifies the type of information that school jurisdictions should consider including in their project submission for a **modernization to an existing school** in order for the need and urgency of the project to be accurately assessed:

- The name of the school, location, current grade configuration and the main driver(s) for the modernization. Please refer to section 2.6.
- The list of the names of all the school facilities currently serving the students who may be re-designated to the modernized facility. These are considered impacted schools as their population will/could be affected if the modernization results in additional capacity or changes to grade configuration.
- Map outlining the location of the site as well as all of the impacted schools within the same geographic sector. This will include the distance between the impacted school(s) and the school proposed for modernization.
- The amount of space that will be removed from the existing school as part of the modernization if the current utilization of the facility is below 85 per cent and the projections indicate a continued decline.
- If projections show low utilization and declining enrolment, provide rationale/evidence to support the need to keep the school operational over the next 15-20 years.
- Other capital projects currently approved for the authority (whether in design or construction phases) serving the same general area that will/could affect the utilization of the impacted school and school proposed for modernization.
- Any modular classrooms that are currently attached to the building (how many, their age and condition) and if they will remain as part of the new facility or be relocated/demolished.
- Review of the current facility audit and identify any statements within the audit where the school division and its third-party independent engineers/analysts have evidence that differs from the audit.
- Report from VFA of IMR and CMR funds expended on this facility over the previous five-years. Provide information on the IMR investment strategy and identify major maintenance work that will need to be done within the next three to five years if a modernization project is not approved.
- Identify any major systems missing from the VFA report.
- Information on anticipated reduction in operational costs, if any.
- Other relevant statistical or anecdotal information that lends support to the jurisdiction's rationale of why this project is required, particularly if the statistical data does not accurately provide the full rationale or does not support the request made.
- Identify and explain any of the following that are issues in the existing building:
 - Adequacy of classroom sizes and availability of flexible workspaces.
 - If additional capacity is being requested as a part of the modernization, please provide all information and documents outlined in Section 2.8.

- Existing or emerging functionality and programming issues in the building that compromise the school's ability to deliver mandated education programs.
- Existing, emerging, or potentially significant health and safety issues.
- Circulation concerns within the building.
- Security concerns with the administrative suite location in terms of ability to monitor visitors and students.
- Concerns regarding sightlines within and outside the facility that pose challenges for supervision.
- Concerns related to acoustics/quality of sound (e.g. students ability to easily hear teachers without noise disturbances).
- Lack of natural light access in instructional spaces.
- Insufficient number of classrooms to deliver the existing programming and future programming.
- Site readiness checklist and supporting documentation (See Section 2.8).

2.9.4 Capital Project Request - Replacement of an Existing School

The data listed below identifies the type of information that school jurisdictions should consider including in their project submission for a **replacement of an existing school** in order for the need and urgency of the project to be accurately assessed:

- The name of the school, location, current grade configuration and the main driver(s) for the replacement. Please refer to section 2.6.
- The list of the names of all the school facilities currently serving the students that this project is intended to serve must be submitted for each individual project. These are considered impacted schools, as their population could be affected when the additional spaces become operational.
- The intended location of the replacement school. If the site is not the same as the current school, provide the rationale for locating the facility elsewhere, and identify the impact to ride times for students. If it will be on the existing site, indicate where it could be situated on the site and whether students can continue to attend the existing school during construction or would need to be relocated (and where).
- Map outlining the location of the site as well as all of the impacted schools within the same geographic sector. This will include the distance between the impacted school(s) and the site of the replacement school.
- Busing information, including average ride times, if students are currently bused from their resident neighbourhood to a designated school outside their sector. Also, identify the expected impact on the impacted schools and any plans for these schools if the new school is constructed.
- Evidence that alternative strategies have been explored and deemed not feasible and/or not effective, including but not limited to the following:
 - grade reconfiguration;
 - boundary adjustments;
 - transportation;
 - use of other facilities in the community;

- enhancing technology in schools (e.g. videoconferencing and distance learning);
- identifying possible partnerships in the community and/or sector;
- program changes/relocation (e.g. for programs of choice); and/or
- modular classrooms added to existing schools;
- The requested capacity of the replacement facility.
- If projections show low utilization and declining enrolment, provide rationale to support the need for a replacement school to be in operation for the next 15-20 years.
- Any other capital projects currently approved for the authority (whether in design or construction phases) serving the same general area that will or could affect the utilization of the impacted schools and the replacement school.
- Any modular classrooms that are currently attached to the building (how many, their age and condition) and if they will remain as part of the replacement facility or be relocated/demolished.
- Current issues with the building's ability to provide functional programming and what changes are anticipated to existing programming and transportation and how the replacement is intended to resolve or mediate these issues.
- Review of the current facility audit and identify any statements within the audit where the school jurisdiction and its third-party independent engineers/analysts have evidence that differs from the audit.
- A report from VFA on all IMR funds expended on this facility over the previous five years. Provide information on the IMR investment strategy and identify major maintenance work that will need to be done within the next three to five years if a replacement project is not approved.
- Information on the deferred maintenance and the five-year maintenance costs that will be eliminated because of the demolition of the existing facility.
- Plans for the existing school, whether demolition, sale or repurposing.
- Any third-party reports on facility condition and/or hazardous materials assessment.
- Information on anticipated reduction in operational costs, if any.
- Other relevant statistical or anecdotal information that lends support to the jurisdiction's rationale of why this project is required, particularly if the statistical data does not accurately provide the full rationale or does not support the request made.
- Identify and explain any of the following that are issues in the existing building:
 - Adequacy of classroom sizes and availability of flexible workspaces.
 - Existing or emerging functionality and programming issues in the building that compromise the school's ability to deliver mandated education programs.
 - Existing, emerging, or potentially significant health and safety issues.
 - Physical movement concerns within the building.
 - Security concerns with the administrative suite location in terms of ability to monitor visitors and students.
 - Concerns regarding sightlines within and outside the facility that pose challenges for supervision.
 - Concerns related to acoustics/quality of sound (e.g. students ability to easily hear teachers without noise disturbances).
 - Lack of natural light access in instructional spaces.

- Insufficient number of classrooms to deliver the existing programming and future programming.
- Site readiness checklist and supporting documentation (See Section 2.8).

2.9.5 Capital Project Request – Solution

This is a new project type that is designed to allow for the submission of a project request for an integrated solution where, in order to meet the project delivery objective, more than one school facility will require construction activity.

Most often, the main project driver will involve a desire to remove excess space in a region of decreasing enrolment by consolidating students from two or more facilities into a single facility. The goal will be to achieve reduced operational costs and improved program delivery and efficiency.

For example, constructing a new K-12 facility in a centralized location that will serve all the students in three aged facilities where the current utilization is low, and the deferred maintenance and operational costs on all three facilities is high. The solution would involve four distinct construction components:

- the construction of a New K-12, x capacity school¹
- the demolition of School A;
- the demolition of School B; and
- the demolition of School C.

The project would be submitted as a single solution project, because all four components would be necessary in order to attain the desired results. This may include the elimination of deferred maintenance; the elimination of underutilized space and the excessive costs to operate and maintain that space; an overall improvement in the sector and jurisdiction utilization; and potentially the ability to provide improved educational programming and efficiency.

The solution is considered to be the “parent project” and each facility or site that will have a construction activity is considered to be a “child” of that parent project.

The data listed below identifies the type of information that school jurisdictions should consider including in their project submission for a **solution** project in order for the costs and benefits to be accurately assessed:

- Name of the area or region for which the project is to provide a solution and the main driver for the solution. Please refer to section 2.6.
- All of the information that would be required on each involved facility if that facility was being considered for a modernization or replacement.

¹ The letter x is used to represent capacity in the example.

- The list of the names of all the school facilities currently serving the students that this new facility is intended to serve must be submitted for each individual project.
- Total deferred maintenance and five-year maintenance costs that will be eliminated through the completion of the project.
- Amount of under-utilized space that will be eliminated.
- Current average utilization of the area/facilities and the expected post-construction utilization.
- Pre- and post-construction operations and maintenance costs, and anticipated annual savings to the school jurisdiction as a result of the project.
- Administrative or travel costs incurred by facility maintenance staff or school administration that would be eliminated as a result of the solution.
- Relevant information that supports the need for the project or helps define a clear benefit to the school jurisdiction and/or the community.
- Relevant statistical or anecdotal information that lends support to the jurisdiction's rationale of why this project is required. Additional anecdotal data is particularly critical if the statistical data does not accurately highlight why the school jurisdiction considers this a particularly important project.
- Site suitability guideline and supporting documentation (See Section 2.8)

Chapter 3

Francophone School Capital Plans

3.1 Overview

Education has put in place criteria to evaluate capital submissions from all jurisdictions, preserving and promoting the French language and francophone culture in Alberta. A Complete Guide and Analysis Tools for Francophone boards (Guide) which was submitted by the Fédération des conseils scolaires francophones de l'Alberta to Education. This guide can be used to assist francophone regional authorities when developing capital plans and to assist Education in analyzing francophone capital submissions. The criteria outlined in the guide, and the subsequent capital decisions based on the criteria, assists in removing or neutralizing deterrents to parents sending their children to a francophone program.

Note: Not every equivalency analysis factor listed below will apply to every capital project request. Francophone regional authorities are encouraged to work closely with Education's Capital Planning Sector to help ensure that relevant project drivers are understood.

3.2 Three-Year Capital Plan

Each year, francophone regional authorities must assess their school capital needs and prioritize proposed projects based on criteria that recognizes the unique requirements of the francophone regional authorities. These projects are identified in the authorities' three-year capital plan.

These plans may include requests for:

- new school construction projects;
- modernization projects;
- replacement projects; and/or
- additions.

The three-year capital plan must be approved by the board of the francophone regional authority, and signed off on an annual basis and then submitted to Education for consideration of funding. Francophone regional authorities must submit their three-year capital plans to Education by April 1 for the upcoming school year.

Capital projects identified in the three-year capital plans must also be submitted through Infrastructure's web application program. The three-year capital plans are reviewed and prioritized by Education, with technical input from Infrastructure, prior to being submitted to the government's capital planning process led by Treasury Board and Finance. The projects identified in the three-year capital plans should include sufficient information to support the regional authorities' priority ranking. Projects are first reviewed for accuracy and clarity. Staff from Education's Capital Planning Sector and Infrastructure's Learning Facilities Branch may meet with a regional authority to obtain further information as required.

Education then reviews and prioritizes project requests by considering the criteria listed in the guide. The analysis and prioritization involves examining the educational experience, viewed globally, and determining whether parents would be deterred from sending their children to a minority language school because it is meaningfully inferior to comparator English-language schools. Francophone regional authorities should work closely with Education as it develops its capital submission based on the requirements listed in the guide to ensure that all necessary steps are completed accurately.

3.3 Evaluation Criteria

Factors that should be considered, where applicable, include:

- **Demand for francophone programming** (“where numbers warrant”). This is the number of people who will eventually take advantage of the contemplated program or facility.
- **Travel times.** The average time it will take students to travel to and from school, as per the Guide.
- **Accessibility.** This pertains to the location and visibility of a francophone program.
- **Functionality of school infrastructure.** The ability to deliver the curriculum in the intended manner, offer extra-curricular programming that is comparable to that offered by comparator English-language schools, offer francophone community services and cultural programming in the facility housing the francophone program.
- **Facility condition.** Assessment of the condition of key components of the facility housing the francophone program (i.e. structural, envelope, interior, mechanical, electrical, building code compliance.)
- **Aesthetic qualities.** The general attractiveness of the facility housing the francophone program based on the perception of a reasonable parents.
- **Ownership of school sites and facilities, and securing school sites.** The nature of the ownership of, and the francophone board’s rights to, the facility housing the francophone program and the property, and any restrictions placed on the use of the facility and the property. The francophone board’s ability to secure new school sites.
- **Utilization rate.** A measure of space use in the facility housing the francophone program. The utilization rate is displayed as a percentage and gives insight into how close a school or jurisdiction is to its maximum student capacity.

The evaluation criteria should be applied where appropriate through the eyes of a reasonable parent.

Further detail on each factor is included in the guide, as well as how each factor is operationalized to assist both the francophone regional authorities and Education in the development and review of the three-year capital plans.

Chapter 4

4.1 Protocol for the Provision of Space for Charter School

A person or society wishing to establish a charter school should refer to the [Charter School Handbook](#) for information on the establishment of a charter school.

New Charter Applicants: Alberta Education will work with charter applicants to identify options to accommodate the school program. For the first term of a charter mandate, financial support will be provided for authorities to lease appropriate space.

The following is a list of lease options in order of preference:

1. Leasing a closed school from an Alberta school authority;
2. Leasing a portion of existing underutilized facility from an Alberta school authority;
3. Leasing space in a government owned, non-school building as a Non-Government User (NGU); or lastly,
4. Leasing from an external third party.

If the primary lease space does not contain all required program delivery spaces (e.g. gymnasium), then a secondary lease or alternative arrangements (e.g. renting gym space) will be supported.

Further information on leasing is in “Chapter 13 - Leasing of School Facilities”.

For information on the amount of space supported by the Ministry for the delivery of education programing, please see “Appendix A - Education Area Guidelines.” The amount of leased areas should align with these guidelines. Leased spaces that exceed the guidelines are considered an exception to the policy and will require special approval.

For information on the Start-Up Costs Grant, please see [Funding Manual for School Authorities](#). The Start-Up Costs Grant provides operational financial assistance to support new school jurisdictions, new school/site for existing school jurisdictions with administration costs (e.g., personnel, technology, materials, supplies, etc.) incurred before the start of the first school year.

Existing Charters: An existing charter operator may request additional, modernization, replacement, or new space needs by including the request in its Three-Year Capital Plan submitted to Education. See “Chapter 2 – Capital Planning Process” for information on Education’s Three-Year Capital Planning process.

Education will review the request to ensure that the request is consistent with the capital planning process and the operator’s charter, including:

- program need;
- grade structure;
- school capacity;

- enrolment;
- space utilization;
- status of the charter term;
- timing necessary to facilitate the space request;
- acknowledgement from Education's Field Services Branch that the charter is in good standing, is meeting the charter mandate and that expanding the program aligns with the ministry's program delivery mandate.

Additional Grant Funding: There are both operational and capital funding components available to charter schools. One-time grant funding to support capital requirements may be available for charter authorities to cover the following costs for start-up and/or expansion:

- Career and Technology Studies (CTS), and
- Furniture and Equipment.

Further information on operational funding support is provided in the [Funding Manual for School Authorities](#).

Career and Technology Studies (CTS): Funding to equip a CTS lab is provided at \$100,000 per lab for all new charter schools that have been assigned a new school code and have a grade 7 to 12 component. The number of supported CTS labs is defined by design standard in Appendix A. As charters are often approved with a unique charter mandate that may not align with the CTS streams, the CTS funding may be used to equip specialty spaces that align with the charter mandate.

Furniture and Equipment (F&E): F&E funding that a new charter leasing space would be eligible to receive is as follows and will be paid based on enrollment over the first three years of operations:

F&E Grant Allocation Formula

$\frac{(\text{Base F\&E Funding Amount}^*) \times (\text{New Student Enrollment}^{**})}{\text{Deductions for existing F\&E and/or separate gym lease}^{***}}$

* The **Base F&E Funding Amount** is \$2,500 per FTE.

** The **New Student Enrollment** is determined as follows: Year 1 FTEs will be based on projected enrollment as identified in the charter application document. A funding adjustment will be made based on the September count date of the current school year as reported in December of that year if there is a positive variance greater than 5%. Year 2 and Year 3 will be funded based on FTE growth (year 2 enrollment less year 1 enrollment, etc.).

*** On a case-by-case basis, **Deductions** to a maximum of 75% will be made for programs whose lease space does not include gyms (up to a 50% deduction) and/or if the leased space already provides furniture and equipment (up to a 50% deduction).

Funding will be provided to a charter school jurisdiction based upon the following two criteria:

Allocation Criteria 1

- The new school/site has been acquired by transfer of an existing school facility from another school jurisdiction; or
- Access to the new school/site has been gained by lease of an existing school facility from another school jurisdiction; or
- Access to the new school/site has been gained by lease from an external third party.

Allocation Criteria 2

- Approved new school/site assigned a new school code.

Notes:

- Where a **capital approval already includes allocations** for F&E and CTS authorities will not be eligible for F&E conditional grants.
- **Reporting F&E Expenditures:** Itemized lists, including item description and model numbers, quantity, and cost of F&E / CTS expenditures may be required. Further information on reporting will be included in the conditional grant.
- **Leasehold Improvements:** Funding for leasehold improvements may be made available to ensure that the authority can meet their charter mandate.

Chapter 5

5.1 Education Area Guidelines

School jurisdictions are encouraged to use a variety of design approaches that respond to the diverse and changing needs of students and teachers in the provision of a quality education. Consideration should be given to the programming needs of the school, community needs and partnerships, and the opportunities and limitations of the specific site and suitability. School projects may be required to meet specific certifications as determined by Infrastructure.

Education's area guidelines (see Appendix A) prescribe areas and other recommendations established for school space with varying grade configurations. These guidelines apply to all new school construction, addition and replacement projects.

The guidelines for school area allocations include instructional and non-instructional area allocations. School jurisdictions must provide a rationale to Education whenever there are deviations from the guidelines. Prior approval must be obtained from Education for these deviations.

Refer to Chapter 11 for additional information on area capacity and utilization.

Chapter 6

Project Delivery Approach

6.1 Background

There are many different approaches that can be used to deliver capital projects. The decision to proceed with a particular delivery approach will depend on the project characteristics, goals and objectives, the capacity to deliver the project and other factors.

Common delivery systems supported by Infrastructure include:

- Design-Bid-Build (DBB),
- Design-Build (DB), and
- Public-Private-Partnership (P3).

Alternate project delivery methods include:

- Construction Management (CM) and
- Integrated Project Delivery (IPD)

Both CM and IPD are classified as cost plus contracts, where all costs plus a markup or profit are paid and require specific approval from Infrastructure to proceed. A DBB or DB approach must be used by school jurisdictions unless Infrastructure approval has been given to pursue an alternate project delivery method.

Regardless of the project delivery approach, all capital projects must abide by legislation and requirements related to procurement and construction, refer to section 1.2 Legal and Policy Framework for noted trade agreements.

General information on the various delivery types can be found in Appendix D.

Chapter 7

Project Implementation

7.1 Limits of Approval

In addition to the approval notice letter, the school jurisdiction will receive pertinent budget information applicable to the approval, such as project ID, contract ID, fiscal year and any special conditions specific to the project from Infrastructure.

7.2 Project Delivery

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

When determining if a project will be grant-funded versus Infrastructure managed, the items considered include, but are not limited to:

- Recent history of the school jurisdiction's delivered projects (budget and schedule);
- Capacity and experience of school jurisdiction staff (including both governance and project delivery personnel);
- Project management plan and controls;
- Illustrated ability to manage procurements in compliance with applicable regulatory requirements, contract documents and associated risks, including legal; and
- Adherence to the approved area allocation, budget, and Technical Design Requirements.

Regardless of the project delivery approach, all capital projects must abide by legislation and requirements related to procurement and construction (Refer to section 1.2).

Chapter 8

Grant-Funded Projects

8.1 Background

In a grant-funded project, a school jurisdiction will receive a grant from Infrastructure and Education to deliver the project. Failure to comply with terms and conditions set out in the grant agreement may result in the province terminating the grant agreement.

8.2 Requirements and Guidelines for Approved Capital Projects

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

- Funding established for hazardous materials, demolition, consulting fees and project expenses are not transferable to other components of the project and must be used only for the approved component.
- Funding cannot be transferred from other components to increase the building construction/site development component or the furniture and equipment component, unless Infrastructure reviews and approves the transfer.
- Funding for non-refundable GST will be provided at 1.6 per cent for some categories in the budget.

8.3 Management, Reporting and Audit of Approved Funding

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

Capital advances, including related interest, must be accounted for in school jurisdiction audited financial statements in accordance with Alberta's Public Sector Accounting Standards.

Detailed guidance on accounting and financial reporting for government capital revenue will be included in the audited financial statement guidelines document, issued to school jurisdictions in advance of the preparation of year-end audited financial statements.

8.3.1 Managing Interest Income

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

School jurisdictions must apply all interest income earned to the project to reduce the total provincial support (TPS). The government will retain any excess funding for future capital approvals.

8.3.2 Managing Approved Funding

Without prior approval of Education and Infrastructure, a school jurisdiction must not apply cost savings from the building construction component to increase the scope of the capital project (e.g., additional space) or to other approved capital projects. Any project surpluses will be retained by government for future capital approvals.

Before the final funding on any project is released, a statement of final cost must be received by Infrastructure, no later than 12 months from the date of substantial performance, from the school jurisdiction indicating that the project is complete. Release of the final funding is also subject to receipt by Infrastructure of:

- A small-scale plan in acceptable format and detail,
- Confirmation the VFA facility condition is up-to-date following a modernization, no later than 12 months from the date of substantial performance and
- Electronic copies of the final construction drawings and specifications (i.e. as-built).

Failure to submit the statement of final cost and small-scale plan as well as update VFA no later than 12 months from the date of substantial performance could impact future funding requests.

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

8.4 Quality Requirements

All construction must conform to the Alberta Building Code. In addition, all projects must follow the latest version of the ["Technical design requirements for Alberta infrastructure facilities"](#).

8.5 Project Stages

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

School jurisdictions must submit information to Infrastructure and/or Education for review at identified stages. Payments will be released upon review and approval of the request for payment form submitted by the school jurisdiction.

8.6 Project Approval

Education and Infrastructure will provide formal written notification to school jurisdictions of approved projects.

Stage 1: Start-Up

Prime Consultant Services

The school jurisdiction must retain a prime consultant for new and modernization projects. This could be of the work.

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

All school capital projects should receive full basic services as outlined by the Recommended Conditions of Engagement & Schedule of Professional Fees for Building Projects jointly developed by the Alberta Association of Architects and the Association of Professional Engineers and Geoscientists of Alberta. Service contracts of \$75,000 or greater are subject to contracting and tendering requirements (Refer to section 1.2).

Cost Consultant Services

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

- cost checks and costing input as necessary at each stage to bring the project construction estimate within the approved budget
- required services constitute full services for a complex construction project, while actual services required will be dictated by project requirements and the number of submissions required by the school jurisdiction.

If additional fees are required for project requirements, the project expenses component can continue to be used up to the budgeted value.

Stage 2: Schematic Design

At the schematic design phase, school jurisdictions must submit documents to Infrastructure and Education to ensure that programming needs have been addressed and the built student capacity will meet the approved student capacity. Schematic design drawings will typically be at 15 per cent completion of design.

In addition to the schematic design drawings, the submission must include the following:

- Instructional area variance form
- Cost report
- Proposed LEED checklist
- Project schedule
- Project report

Once a full submission is provided, Infrastructure's technical services and procurement branch (TSPB) will have 10 business days to provide feedback or comments on the design. If the submission is incomplete, it will be returned without review.

It is the responsibility of the school jurisdiction to ensure that acceptable responses are given to all comments. Future design submissions will not be accepted until adequate responses are provided.

The project report must indicate where the minimum standards identified in the [Technical design requirements for Alberta infrastructure facilities](#) have not been met and the reasons why.

Approval required

If approved by Infrastructure and Education, Infrastructure will send notification to the school jurisdiction authorizing them to proceed to the design development stage. Proceeding without approval may affect future funding releases and approvals to proceed.

Stage 3: Design Development

The project report must address consultant team code analysis, detailed documentation of scope of work (audit upgrading), design criteria applicable to the project (and education program), project schedule (with phasing to address instructional needs during construction), and total project cost breakdown (including soft costs). The project report must indicate where the minimum standards identified in the [Technical design requirements for Alberta infrastructure facilities](#) have not been met and the reasons why.

Design development drawings must be submitted in conjunction with the project report.

Once a full submission is provided, Infrastructure's technical services and procurement branch (TSPB) will have 10 business days to provide feedback or comments concerning the design. If the submission is incomplete, it will be returned without review.

It is the responsibility of the school jurisdiction to ensure that acceptable responses are given to all comments. Future design submissions will not be accepted until adequate responses are provided.

Approval required

If approved, Infrastructure will send notification to the school jurisdiction authorizing them to proceed to contract documents. Proceeding without approval will affect future funding releases on the project and approvals.

Stage 4: 50-60 Percent Construction Documents

A submission at 60 percent design is required to ensure the scope and budget remain in line with the grant agreement. This is also the initial review of the working drawings and specifications.

Once a full submission, which includes outline specification is provided, Infrastructure' will have 10 business days to provide comments. It is the responsibility of the school jurisdiction to ensure that responses are

given to all comments. Future design submissions will not be accepted until adequate responses are provided.

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

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

Approval required

If approved by Infrastructure, Infrastructure will send notification to the school jurisdiction authorizing them to proceed to 90 per cent design. Proceeding without approval will affect future funding releases and approvals to proceed.

Stage 5: Pre-Tender / 90 Percent Construction Drawings

At least four weeks prior to the proposed date of tender, school jurisdictions must submit to Infrastructure for approval electronic (pdf) copies of the 90 percent design.

It is expected that prior to tender, all projects are on or below budget. If the pre-tender estimate is over budget, the jurisdiction must identify the source of additional funding.

Once a full submission is provided, Infrastructure's TS will have 10 business days to provide comments. It is the responsibility of the school jurisdiction to ensure that responses are given to all comments. Design changes will need to be incorporated into the tender documents.

Approval required

If approved by Education and Infrastructure, Infrastructure will send notification to the school jurisdiction authorizing them to proceed to the tender stage. Proceeding without approval will affect future funding releases and approvals to proceed.

Stage 6: Tender

School jurisdictions must submit one full package of the documents for tender (e.g., drawings, specifications, addenda) to Infrastructure. School jurisdictions are responsible for all costs and expenses relating to the project, including any cost overruns incurred.

Contracting Requirements

School jurisdictions are required to comply with applicable provisions of provincial agreements respecting procurement of goods and services necessary to complete an infrastructure project (Refer to section 1.2).

All projects must be posted on [Alberta Purchasing Connection](#).

Avoiding Unnecessary Bid Requirements

To reduce the number of non-compliant bids, school jurisdictions should work with their consultants to ensure that calls for bids require only those types of information that are absolutely necessary for consideration of the contract award (i.e., firm name, price, signature, seal, date and insurance).

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

Stage 7: Post Tender

Post Tender Procedures for Projects

School jurisdictions must submit a letter of confirmation that the board is in compliance with the requirements of the respective capital grant agreement:

- the board has complied with the requirements of all applicable sections of the *School Capital Manual*;
- confirmation that the tender is within the approved project scope and budget;
- all submitted tenders abide by all applicable laws and trade agreements;
- copy of the board motion of the selection of the tender; and
- where a board motion is not possible when the board is recessed, an indication that the board authorized mechanism, such as delegation, is being utilized can be included in the recommendation letter.

School jurisdictions must submit an electronic copy of the signed contract with a contractor.

Stage 8: Construction

The jurisdictions must advise the province of any unusual or unforeseen conditions or developments that may affect the project budget or schedule as soon as they become known to the jurisdictions.

Stage 9: Closeout

School jurisdictions will submit a copy of the certificate of substantial performance to Infrastructure within 15 days of being accepted by the prime consultant.

The school jurisdiction must receive copies of record drawings and operations and maintenance manuals from the prime consultant. Electronic record drawings must be submitted to Infrastructure.

School jurisdictions must also provide small-scale plans and an updated [Form 18 – Instructional Area Form](#) to Education and Infrastructure once the building is occupied.

For modernization projects, the consultant must update the VFA facility condition information.

School jurisdictions must submit a [Form 3 – Statement of Final Costs](#) (SFC) as set out in the capital grant agreement. Upon approval, the remaining total provincial support (TPS) funding will be provided, up to a maximum of the capital grant agreement value, or total cost, whichever is less.

If the SFC is not submitted within the timeframe indicated in the capital grant agreement, the school jurisdiction may be advised that the project is closed and no further funds will be advanced.

If the school jurisdiction encounters any extenuating circumstances that would warrant an extension in the timelines, written notification must be forwarded to Infrastructure's Regional Director, Learning Facilities Branch, outlining the situation and requesting an extension.

Grant-Funded Process

As a result of the removal of the School Building and Tendering Regulation, school jurisdictions do not require Infrastructure's approval to award contracts.

Chapter 9

Infrastructure Managed Projects

9.1 Background

Infrastructure and Education will jointly support school jurisdictions throughout the building process. Shortly after school projects are approved and announced, Education and Infrastructure holds preliminary meetings with representatives of the school jurisdiction to discuss the approved project scope, capacity and grade configuration of the school.

Infrastructure engages vendors, not the school jurisdictions.

9.2 Roles and Responsibilities

Role of School Jurisdiction

- Provide functional program and design input.

The school jurisdiction must determine educational programming emphases, including confirmation of career and technology studies (CTS), and strands identified in the jurisdiction's capital plan, provide input on design and program, and identify a primary spokesperson who can speak on behalf of the jurisdiction (e.g., administration, teachers, parents).

- Navigate local processes.

The school jurisdiction must ensure that school board meetings are held to provide timely responses and decisions to aspects of the design. Stakeholder input must be gathered by the school jurisdiction and provided in a timely manner.

- Create community partnerships.

The school jurisdictions are responsible for having discussions with interested partners and receiving commitment within parameters (e.g. time). All partnership statements of commitment must be in place prior to completion of the schematic design stage and funding agreements must be executed prior to tender.

- Participate in design reviews.

The school jurisdictions are involved in reviews of the functional design, schematic design, design development etc. School jurisdictions must sign off on the final design at all stages as requested by Infrastructure. Education must approve the design to ensure that it meets programming and capacity requirements.

Provide furniture and equipment, including career and technology studies school jurisdictions are responsible for fitting up the schools and making any decisions regarding needed furniture and equipment for the schools.

- Operate the schools
- Design and install playground (If applicable, after school projects are complete).

Role of Education

- Lead the planning of the projects.

Education will affirm scope, capacities, grade configuration, sites, and programming needs to the point of design.

Education should be included in the design meetings to provide school authorities with support in the area of education programming (e.g., career and technology studies, fine arts, etc.). Capital Planning managers in Education will continue to liaise with school jurisdictions and the project managers throughout the project.

- Partnerships and funding agreements.

Education, in collaboration with the school authority, will engage in discussions on partnerships and receive commitment from the partners prior to completion of the schematic design stage. The funding agreement must be executed prior to the project proceeding to tender.

Role of Infrastructure

1. Lead implementation of approved projects.

Infrastructure will engage and manage the services of professional consultants and general contractors to carry out design and construction.

2. Project management and direction.

Infrastructure will be responsible for the following: schedule, cost, scope, quality, procurement, request for qualifications (RFQ), request for proposal (RFP), tender process, contract award.

3. Contract management.

Infrastructure will be responsible for the following: coordination of design and construction, site meetings, instructions to contractors, change orders, payment.

Provide the budgets for furniture and equipment, career and technology studies, and SuperNet.

Refer to Chapter 10 for more information on furniture and equipment.

4. Facilitate the incorporation of the playground into the overall school design as early as possible.

Infrastructure will work with the school jurisdiction to consider the location and size of the playground during school design and will make provisions to support it, including:

- site preparation,
 - grading drainage,
 - landscaping providing appropriate walkways and lighting,
 - considerations toward accessibility and safety (clear lines of sight).
5. Plan for emergency and maintenance vehicle access.

9.3 Third Party Funding Agreements

For third party agreements where the Government of Alberta does not receive an asset or increase in asset value:

- Education, in collaboration with Infrastructure and the third party, will engage in discussions on partnerships and receive commitment from the partners.
- Education will develop funding agreements for third party contributors to the project.
- Infrastructure will develop funding agreements for third party contributors to non-school jurisdiction owned projects.

9.4 Related Party Funding Agreements

For related party agreements where the Government of Alberta does receive an asset or increase in asset value:

- Education, in collaboration with Infrastructure and the related party, will engage in discussions on partnerships and receive commitment from the partners.
- Education will develop funding agreements for third party contributors to the project.
- Education will manage the funding agreement, which includes: determination of appropriate accounting and budget treatment, (including any joint submissions with Education to Treasury Board and Finance to request additional funding as required) and budget (collect and report on the contribution from the related party).

Chapter 10

Furniture and Equipment

10.1 Furniture and Equipment

School capital approvals traditionally include a grant-funded allocation called furniture and equipment (F&E). The purpose of this fund is to support the purchase of furniture and equipment needed to prepare the space in approved capital projects for instruction.

In general, F&E items are moveable and not attached to the building or site. These items are normally provided under a contract separate from the general construction contract.

F&E funding is provided directly to the school jurisdiction. It can only be used for the purpose it was intended and cannot be transferred from F&E to increase the building construction costs, including site development. The F&E component does not provide funding for fixtures included in the building construction costs (including site development) of the approved budget.

Calculations and funding are the responsibility of Infrastructure.

A request for payment form must be submitted to Infrastructure for the jurisdiction to receive the F&E installment. The payment schedule is as follows:

- 50 percent of the total amount is eligible to be released upon request shortly after project construction begins
- 25 percent of the total amount is eligible to be released upon request six months prior to substantial performance/interim acceptance of the project
- 25 percent is eligible to be released upon request shortly after substantial performance/interim acceptance

If furniture and equipment F&E and career and technology studies items are included in the construction contract, the F&E funds paid to the jurisdiction will be reduced accordingly. A complete accounting reconciliation of these deductions is required at the time of the final installment.

Chapter 11

Area, Capacity and Utilization

Every year, Education sends area, capacity and utilization (ACU) reports to each authority. The reports provide information about the instructional area, capacity and utilization rate of its facilities. The utilization rate supports decisions related to modular classroom allocations, capital project approvals and operations and maintenance funding (see the [Education Funding Manual for School Authorities](#) for details). It is important that jurisdictions carefully review these reports, as they are responsible for verifying the accuracy of the information and notifying Education of any errors or omissions.

11.1 Area

Area within a school consists of non-instructional area and instructional area. The following definitions will be helpful when discussing the ACU data as well as other data relevant to capital planning.

Non-instructional area includes, but is not limited to, administration and staff area, wrap around and collaboration space, service rooms, storage area, and washroom area.

Instructional area is primarily designated as a teaching area. Instructional area includes, but is not limited to classrooms, science rooms, ancillary rooms, gymnasiums, career and technology studies labs, and learning commons (libraries).

Designated lease space

- Not-for-profit – is any instructional area that is under a one-year renewable lease to a not-for-profit lessee during normal school hours. The designated spaces are not used by the school jurisdiction for delivery of their regular K-12 program delivery.
- For profit – is any instructional area that is under a one-year renewable lease to a for profit lessee during normal school hours. The designated spaces are not used by the school jurisdiction for delivery of their regular K-12 program delivery.

Temporary or part-time leases in non-designated school space – Instructional area in a facility that is most often used by the school jurisdiction for regular program delivery but may also be used after hours by either for profit or not-for-profit organizations (e.g., before and after school care providers).

Designated outreach space is an area, within an active school that also offers regular K-12 programming, that is used exclusively for outreach programming during regular school hours. The space must be flagged as Designated Outreach Space in the [Form 18 – Instructional Area Form](#) and a [Form 19 – Relocation of Outreach Programs K-12 Facilities](#) must be completed when a space is being designated as Outreach Space.

Refer to Appendix A for further information on Education’s Area Guidelines.

11.2 Capacity

The capacity of a school facility is determined based on the instructional area only and is only calculated for school buildings that have an active K-12 program.

11.2.1 Instructional Capacity

Instructional classroom capacity is calculated by taking the total instructional area less the areas associated with gymnasiums (including gymnasium storage space), physical activity rooms, learning commons (libraries), and career and technology studies labs and dividing it by the instructional area per student.

Grade Configuration of School	Instructional Area per Student
K-3 K-4 K-6	3.47 m ²
K-9 5-9	3.61 m ²
K-12 7-9 7-12	3.69 m ²
9-12 10-12	3.65 m ²

Exempt Instructional Capacity

Some instructional areas in a school may be exempted from inclusion in the calculation of the rated capacity. This will reduce a school's overall rated capacity.

Exemptions are:

- area that fits the description of a designated lease where the lessee is to the public sector or a non-profit group (including early childhood services and private operators), with the lease rate being at cost or for a nominal fee;
- area leased by private schools;
- area leased by charter schools;
- jurisdiction-jurisdiction leases;
- decentralized district administration space in schools; and
- area funded and operated by a third party that is not available for use by the jurisdiction.

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

A school jurisdiction must submit [Form 4: Reporting of Designated Space in School Buildings](#) when requesting a space exemption.

11.2.2 Rated Capacity

Instructional areas for gymnasiums, including gymnasium storage areas, learning commons (libraries), physical activity rooms and CTS labs are all given a rated capacity, which is added to the instructional capacity.

- **Career and technology studies labs:** 20 student spaces per lab.
 - Career and technology studies labs are provided when a school has a grade configuration that includes Grades 7 or above. No career and technology studies labs are allocated for Grades K-6.
 - All schools with a Grade 7 or above are allocated at least one career and technology studies labs lab.
- **Physical activity room:** 20 student spaces per room.
 - Physical activity rooms are typically weight rooms or fitness rooms, where equipment can often take up a large portion of the space.
- **Learning commons (libraries):** Zero student spaces will be assigned if the school offers any grade combination that includes Kindergarten to Grade 6 or if the instructional capacity is less than 300. Otherwise, a capacity of 25 is assigned.
- **Gymnasiums and gymnasium storages:** Zero student spaces will be assigned if the school offers any grade combination that includes Kindergarten to Grade 6 or if the instructional capacity is less than 300. Although gym storage is listed as instructional area, it does not add any capacity.
 - Otherwise gymnasiums are rated as follows:
 - Gymnasiums 0 – 640 m² are rated at 25.
 - Gymnasiums 641 – 800 m² are rated at 50.
 - Gymnasiums greater than 801 m² are rated at 75.

11.2.3 Net Capacity Calculation

Net capacity of a school is determined by dividing the instructional classroom area of the school less any designated exempt areas and designated outreach areas by the instructional area per student, and adding the rated capacity for career and technology studies labs, gymnasiums, physical activity rooms and learning commons (libraries).

The net capacity for a school is determined using the following formula:

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

The small-scale plan and data sheet is used to identify all instructional area.

11.3 Total Adjusted Enrolment

Student enrolment numbers are submitted by jurisdictions to Education in the fall of each year. The adjusted enrolment for a school uses a student allowance factor to account for the additional space required by some students with special needs for the effective and safe delivery of programs.

$$\begin{aligned} \text{Total Adjusted Enrolment} = & \\ & (\text{ECS} - \text{ECS students with severe disabilities}) \times 0.5 \\ & + (\text{Grades 1 to 12} - \text{Grades 1 to 12 students with severe disabilities}) \\ & + \text{ECS students with severe disabilities} \times 1.5 \\ & + \text{Grades 1 to 12 students with severe disabilities} \times 3.0 \end{aligned}$$

11.4 Utilization Rate

Displayed as a percentage, utilization rates give insight into how close a school is to its maximum student capacity. A school is considered full when the utilization rate is 100 percent.

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

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

11.5 Annual Updates and Review Process

Each year, school jurisdictions are required to send [Form 18 – Instructional Area Form](#) for all new schools that have recently been completed, as well as updates to existing forms for schools where the instructional area has changed due to modernization, modular classrooms, additions, or changes to exempt space. The deadline for submission is the end of October of each year or upon receiving an updated small-scale plan and data sheet. Jurisdictions must submit all required information to edc.cpdata@gov.ab.ca for review.

Each year, school jurisdictions will be sent area, capacity, and utilization reports with information on instructional area, instructional capacity, rated capacity, net capacity, adjusted enrolment, and utilization

rates. Utilization rates are provided for each individual school, for the jurisdiction overall, for open schools in the jurisdiction and for closed schools in the jurisdiction. The ACU does not include outreach facilities.

Education's Capital Planning sector cannot change the adjusted enrolment information if a jurisdiction identifies errors or omissions. Jurisdictions should review their provincial approach to student information enrolment submission. If a jurisdiction identifies errors or omissions with the adjusted enrolment information they should contact Red Tape Reduction and Student Records by email studentrecords@gov.ab.ca.

If a jurisdiction identifies errors or omissions with the capacity information on the area, capacity and utilization reports, they should contact Education's Capital Planning, by email at edc.cpdata@gov.ab.ca, to request a review. The email should include a detailed description of the concerns. If the concerns are related to capacity, the small-scale plan and [Form 18 – Instructional Area Form](#) along with room numbers, the room purpose, and a clear explanation of the issue or concern, should be included.

Education's Capital Planning will review the request and provide a response to the jurisdiction. In some cases, the jurisdiction may be required to provide additional information.

Chapter 12

Modular Classroom Program

12.1 Background

The Modular Classroom Program (MCP) provides school jurisdictions with modular classrooms, modular/portable unit relocations and demolitions in order to assist jurisdictions with the accommodation of students on an urgent basis.

Education oversees the prioritization, planning and approval of the program, while Infrastructure is responsible for implementation.

12.1.1 Exceptions

The modular classroom program does not apply to the following:

- modular classrooms that are part of a new, replacement or modernization school capital project
- modular classrooms for decanting purposes
- modular classrooms for P3 (public-private partnership) schools that have achieved their full build out capacity
- modular classrooms that are being relocated or leased at the school jurisdiction's own expense (*Education Act*, section 195(2))

12.2 Policies

12.2.1 Modular Classrooms

Each year, school jurisdictions are asked to submit requests for modular classroom units to help ease enrolment pressures, address programming needs, address health and safety issues, and the replacement of portables exceeding or at the end of their service life. Modular classrooms are provided as solutions to the above issues and should be removed (via relocation or redeployment) when no longer required.

In some cases, connecting links are incorporated to provide interior access to an exterior grouping of modular classrooms. The construction of any link, if required, will be the responsibility of the school division.

12.2.2 Relocation of Modular/Portable Classrooms

As part of the annual modular classroom program funding may also be designated for the relocation of modular classrooms from an existing school (donor school) to another school (receiver school) or to another school jurisdiction for the purpose of easing enrolment pressures at the receiver school.

12.2.3 Declaration of Surplus Modular/Portable Classrooms

When a jurisdiction finds that they have a modular classroom that is no longer needed to accommodate the instructional needs of students, they are asked to advise Education of the surplus unit(s) through the modular classroom program annual modular submission process. Before declaring any surplus, jurisdictions must ensure that the modular classroom unit(s) in question are in good condition. In order to do so, jurisdictions are asked to provide a modular-unit condition assessment report (MCA) from a certified professional with their submission.

12.2.4 Demolition of Modular/Portable Classrooms

Modular classroom program funding may also be designated for the demolition of modular/portable classrooms and the reclamation of the affected school sites for the purpose of removing classroom units which are no longer viable from a jurisdiction's inventory. Demolition and reclamation requests can be submitted through the modular classroom program and annual modular submission process. Submissions should be accompanied by additional information verifying the condition of the modular classroom(s) being considered, including a modular-unit condition assessment report from a certified professional.

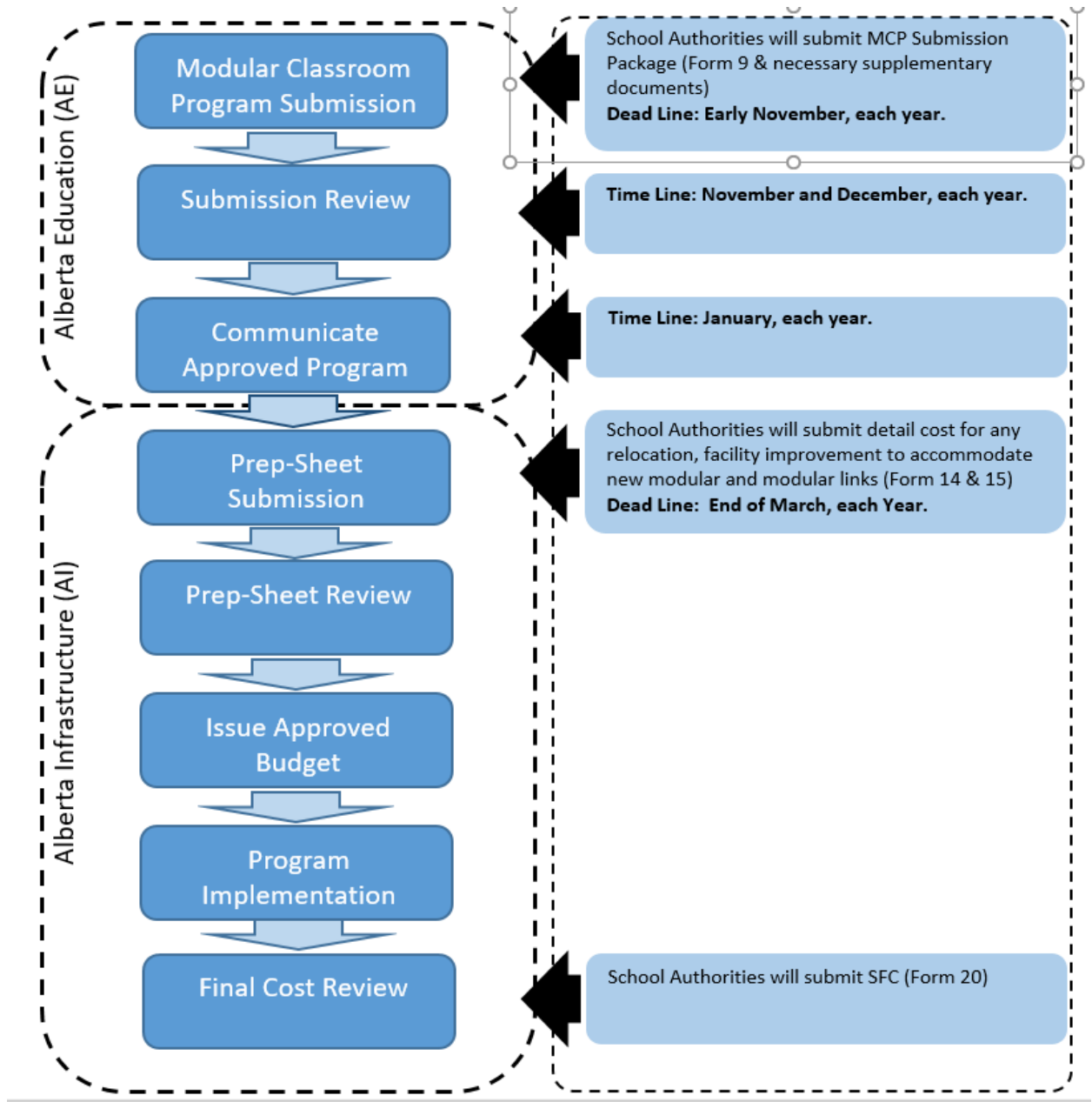
12.3 Modular Classroom Program Procedure

Each year in October, Education asks school jurisdictions to submit their modular classroom program requests for:

- additional modular classroom space;
- relocation of existing classroom(s) between schools within the jurisdiction;
- declaration of surplus modular classroom(s) (not required within the jurisdiction);

demolition of modular classroom(s) no longer performing as suitable student accommodation and the associated site reclamation.

The modular classroom program (MCP) procedure is illustrated in the flowchart below²



² Any change of these dates will be communicated by Capital Planning Department to School Jurisdiction in well advance

12.3.1 Submission of Modular Requests

All jurisdictions are required to complete [Form 9 – Modular Classroom Program Request](#). The cover page will instruct jurisdictions on the corresponding schedule(s) to complete based on their needs. If a jurisdiction has no requests applicable to a particular modular request, the cover page of the form is required to be completed with “no” selected in all the modular requests listed.

The signed form, along with the original excel documents are to be submitted to Education (edc.cpdata@gov.ab.ca) by early November. Education will review the submissions and create a list of recommendations for the Deputy Minister’s consideration. The approval of modular classrooms, modular/portable relocations, and demolitions is dependent on the provincial funding allocation. If funding has been allocated, approved projects are often announced in January of the following year.

12.3.2 Modular Classroom Program Approval

Upon approval of new modular classrooms, jurisdictions will appoint a consultant and design team to help the jurisdiction with the requirement to submit the prep sheet and site plan for review and approval (Section 12.4.1).

Once the prep sheets are approved, Infrastructure will order the units(s) from the manufacturer and advise the jurisdiction to proceed with the development of a pre-tender package (which includes drawings, specifications, and a cost estimate) for the delivery and set up of the modular units (Section 12.4.2). Jurisdictions must submit the pre-tender package to Infrastructure for consideration and to ensure the scope of work aligns with the funding available.

The funding approval letter will be provided to the school jurisdiction outlining the allocation of funding for the approved project. The funding amount is based on the tendered project amount and applicable fees (consultant fees, project expenses).

Upon receipt of the signed construction contract and approval of [Form 20 – Payment Request Form](#), the jurisdiction will receive 80 percent of the approved funding for the installation of the modular classroom units. Up to 20 percent of the remaining funding may be forwarded to the jurisdiction upon receipt of the statement of final cost.

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

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

Jurisdictions are required to submit their statement of final cost for all modular projects within six months of the completion of the installation and set-up. It will then be reviewed by Infrastructure. Once it has been approved, the provincial portion of the actual expenditures up to the remaining 20 percent will be forwarded

to the jurisdiction. Release of the final funding will be subject to receipt by Infrastructure of a small scale plan in acceptable format and detail.

The payment request form, once completed, should be submitted to INFRAS.JurisdictionPayments@gov.ab.ca

12.4 General Information

12.4.1 Modular Classroom Prep Sheet

Once modular projects are approved, jurisdictions are required to complete the modular classroom prep sheet(s). Prep sheets should include the configuration of the modular classroom(s), estimated costs, and connecting link costs (if applicable). [Form 14 – Modular Prep Sheet](#) is intended for modular units and [Form 15 – Relocation Prep Sheet](#) is for the relocation, deployment, or demolition of modular/portable units.

A site plan is also required with the prep sheet submission. The plan should show the full dimensions of the entire school site including the school, its location, the orientation of the modular classrooms and connecting link (if required), as well as site access points. The site plan should also identify the type of modular classrooms (A-unit type and orientation and/or B-unit).

Jurisdictions need to submit the completed form(s), site plan(s), along with any supplementary information to Infrastructure (Infras.MCP@gov.ab.ca) by the end of March. Please note if the above information is not received by the due date, the unit(s) are not guaranteed to be on site for the start of the coming school year.

12.4.2 Pre-tender Package

Infrastructure is responsible for ordering all the new unit(s) from the manufacturer(s) and advising authorities to proceed with the development of a pre-tender package once Infrastructure has reviewed and approved the prep sheet. School authorities must submit the pre-tender package to Infrastructure for review. This review will ensure that the scope of work aligns with the modular classroom program supportable scope of work.

The funding allocation for furniture and equipment for new modular units is currently \$12,000 per unit and the allowable consultants' fees are up to a maximum of 12.58 percent of the delivery, and set-up project costs (excludes purchase of the unit and furniture and equipment). Post tender adjustment of fees will not be supported for higher than anticipated costs. There is no furniture and equipment allocation for modular relocations or redeployments.

Authorities must ensure that they are following all relevant contract legislation and requirements, including the [New West Partnership Trade Agreement](#) and [Canadian Free Trade Agreement](#).

Chapter 13

Leasing of School Facilities

School jurisdictions can lease property to or from jurisdictions, persons, or municipalities in accordance with section 193 of the *Education Act*. Leasing arrangements are intended to be temporary solutions until permanent accommodation can be made available.

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

The preferred option is to lease surplus space from a public or separate school jurisdiction in the area. If this option is not available, funding may be provided to lease other public or government owned facilities, and if no other options are available, funding may be provided to lease a third-party owned facility.

The final decision regarding whether to lease space is the responsibility of the local school jurisdiction. Any leasing costs that are beyond the available funding provided by Education are the responsibility of the jurisdiction.

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

See section 13.5 for further information on Submitting Requests for Lease Funding Support

13.1 Jurisdiction-to-Jurisdiction Leasing

Education does not grant lease support funding to jurisdictions that lease facilities owned by other jurisdictions.

Education will provide Maintenance and Renewal funding to school jurisdictions that lease such facilities to other jurisdictions (usually to francophone regional authorities and charter schools). See Chapter 15 for details on the maintenance and renewal programs, and funding distribution for leased space. The host jurisdiction is responsible for maintenance and renewal (upgrades) of the facilities within the allocated funding. Host jurisdictions and tenant jurisdictions are required to work together to identify and jointly approve maintenance and renewal plans that address critical maintenance and renewal projects in the leased facilities.

Jurisdiction-to-jurisdiction leasing should be for a nominal sum, and these leases should also include an agreement on how utilities will be paid.

The host jurisdiction is eligible to receive a capacity exemption. Education calculates the area, capacity and utilization and the exempted space is excluded from the calculation of total capacity of that jurisdiction.

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

13.2 Leasing Third Party Owned (“Privately Owned”) Facilities

Where it is necessary to lease third-party owned facilities and upon approval by the Minister, lease funding will be provided for francophone and charter schools commensurate with the area required to support their enrolment. Any remainder of the annual funding pool will be pro-rated for alternative programs or other educational program needs according to eligibility criteria and a funding support formula.

13.2.1 Eligibility Criteria

To be eligible for lease support for alternative programs or other educational program needs, the third-party owned facilities must meet the following eligibility criteria:

- It is unreasonable in terms of proximity and available space to move the program to a jurisdiction-owned space.
- The privately owned facility meets current health and safety requirements and provides a suitable learning environment for the program and students.
- The alternative program is able to maintain stable enrolment as measured by either historical or projected enrolments.
- The privately owned facility is located within the jurisdiction's boundaries.
- SuperNet or other cost-effective internet services are available on site.

13.2.2 Funding Support Formula

The amount of lease support for alternative programs in third party owned facilities is:

Lease Support Funding (\$) =

gross area per student (9.1 m²/student) x the lesser of adjusted enrolment and net capacity
(number of students) x Class C market lease rate (\$/m²) x pro-rating percentage for the year

Funding is allocated each year on a pro-rated basis and is affected by the available lease funding, the number of lease requests received and the market rates.

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

- for purposes other than the instruction of students
- for physical and recreational activities, with the exception of gymnasiums
- during the period of modernizing an existing school facility
- where the lease agreement has not been approved by Education

Note that no portion of maintenance and renewal funding is provided for third party owned facilities.

13.3 Leasing out Vacant Space (acting as a lessor)

Leasing space must be done in accordance with the *Education Act*. School jurisdictions that lease out space may apply to have that space exempted from their utilization rate calculation. For space exemption purposes, school jurisdictions must submit a leasing of school space form to Infrastructure, providing information on the area leased and the type of lessee.

See section 11.2.1 for further information on Exempt Instructional Capacity.

13.4 Leasing for Outreach Programs

Lease support funding is not provided for outreach facilities. Additional information on these guidelines and funding for outreach programs is available in the current [Funding Manual for School Authorities](#).

See section 11.1 for further information Designated Outreach Space in a school building.

13.5 Submitting Requests for Lease Funding Support

Each year, all jurisdictions must submit their lease funding request(s) to Capital Planning, Education no later than March 1, and must include details of all leases that will be in effect for the upcoming school year.

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

13.5.1 Submission Requirements

Jurisdictions are required to submit all third-party leases, including new leases, renegotiated or renewed leases, ongoing and year-to-year leases to Education's Capital Planning (EDC.CPdata@gov.ab.ca) on an annual basis. The submission must include:

- A completed [Form 13 – Lease Request Form](#) indicating the lease amount
- A signed copy of lease agreements, including lease extensions or addendums
- [Form 18 – Instructional Area Form](#) and small-scale plan of the leased facility

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

Chapter 14

Disposition of Property

In accordance with section 192 (1) of the *Education Act*, a board may, with prior written approval of the Minister, sell, lease, rent, or otherwise dispose of any of its real property. Part 17 of the *Municipal Government Act* specifies the terms and conditions of the use and disposal of reserve land.

The *Disposition of Property Regulation AR86/2019* specifies requirements pertaining to the disposition of school and non-school buildings and land, including the requirement for ministerial approval. The steps below outline the process for requesting ministerial approval:

Step 1: Notification of Intent to Dispose

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

The initial notification of intent to dispose can be made in writing or email to your capital planning manager. After Capital Planning has notified the school jurisdiction that the checks are complete and has identified no obstacles to disposition, the school jurisdiction may begin fulfilling any applicable *Disposition of Property Regulation AR86/2019* requirements.

Step 2: Formal Request to Dispose

Once a buyer is identified, a written request for ministerial approval should be made to the executive director, Capital Planning. The request must include legal land description, buyer information, selling price, verification that the board has agreed to the disposition, confirmation that the applicable requirements of the *Disposition of Property Regulation AR86/2019* have been fulfilled, and appraisal values (if required by the regulation).

The use of the proceeds from the sale of school jurisdiction real property is determined according to the formula described in section 10 of the *Disposition of Property Regulation AR86/2019*.

Chapter 15

Maintenance and Renewal Programs

Overview

School jurisdictions are responsible for ensuring that the health, safety and essential maintenance needs for each board-owned facility are addressed. Maintenance and renewal funding is provided to meet these needs and reduce deferred maintenance liabilities.

Maintenance and renewal funding should be spent only for approved purposes. Jurisdictions should use the funds to:

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

To deal with emergent projects as they arise, school authorities should consider setting aside contingency funding.

Maintenance and renewal programs funding is NOT to be used for major capital projects, including the addition of permanent or modular school space.

For maintenance and renewal projects with an estimated cost in excess of \$1 million, school jurisdictions must request approval from the Minister of Education before the project is tendered. Authorities with questions about whether a project is supportable under the maintenance and renewal program funding framework should consult with the appropriate capital planning manager before beginning the project.

There are currently two maintenance and renewal programs available to school authorities:

- Infrastructure maintenance and renewal (IMR)
- Capital maintenance and renewal (CMR)

The IMR program is annual funding based on the school year (September 1 to August 31), which is allocated to school jurisdictions on a formula basis. Payments are made annually in April of any given school year. IMR projects must meet the above criteria and the expenditures may be capitalized or expensed.

The CMR program is for specific maintenance and renewal projects. In September of each year, jurisdictions are asked to submit their highest priority CMR projects to Capital Planning to identify their financial need. While the September CMR submission is provided to Treasury Board as part of Education's annual capital submission, specific projects are not approved as part of future budget announcements. Funding is still determined by formula. Besides meeting the above criteria, CMR projects must also be capitalized. A CMR project is to be capitalized if the asset will have a useful life that is greater than one year and the cost of the asset is above a threshold of \$5,000. However, it is ultimately up to each boards' auditors to determine if a project meets the capitalization criteria.

CMR funding is provided based on the Government of Alberta fiscal year (April 1 to March 31). Payments are made annually in May and September of any given school year.

For jurisdiction to jurisdiction leases host jurisdictions and tenant jurisdiction are required to work together to identify and jointly approve IMR/CMR plans that address critical maintenance and renewal projects in the leased facilities.

15.1 Expenditure Plans

Each year, school jurisdictions are required to create an expenditure plan outlining how they anticipate to spend their IMR funding allocation for the upcoming school year. The expenditure plan should be available upon request. There are several sources of information that should inform the decisions regarding spending, including:

- information contained in the facility audits
- the requirement list report from VFA
- any third party structural or engineering reports procured by the school jurisdiction
- written opinions provided by Infrastructure's Technical Services Branch
- first-hand information provided by the school jurisdiction's facility staff
- contractual obligations that span multiple years

The instruction manual for the use of the VFA system is available to school authorities online in its module. Authorized school jurisdiction staff may contact Alberta Infrastructure to access this.

Note: Education recognizes that infrastructure maintenance and renewal spending decisions can change during the year based on events that were not anticipated when the plans were developed. The responsibility remains with the school jurisdiction to revise the plan if necessary to ensure the safety of staff, students and government assets and to respond to emerging needs for the appropriate maintenance of school facilities.

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

15.1.2 CMR Plans

Each September, school jurisdictions are required to create and submit a project list outlining how they anticipate to spend their capital maintenance and renewal funding allocation for the upcoming three fiscal years. The project list template requires information at the system/component level for each school that is

being submitted as part of the annual process. School jurisdictions are encouraged to submit projects in each of the three Government of Alberta fiscal years.

Like infrastructure maintenance and renewal, there are several sources of information that should inform the decisions regarding spending, including:

- information contained in the facility audits
- the requirement list report from VFA
- any third party structural or engineering reports procured by the school jurisdiction
- written opinions provided by Infrastructure's Technical Services Branch
- first-hand information provided by the school jurisdiction's facility staff
- contractual obligations that span multiple years

15.2 Calculation of Maintenance and Renewal Funding

15.2.1 Infrastructure Maintenance and Renewal Funding

This funding is calculated based on the funding formula as outlined in the [Funding Manual for School Authorities](#).

Notes:

- The gross area included in the calculation is for public, separate and francophone board owned facilities that are currently in active use for the instruction of early childhood services children and students in Grade 1-12 and are not under a P3 maintenance contract.
- The jurisdiction full time equivalent (FTE) enrolment is for the most recently completed school year, based on that year's frozen funded head count as of the last business day of April. FTEs are determined as follows:
 - Grades 1-12 students are counted as 1.0 FTEs
 - ECS children are counted as 0.5 FTEs
 - Online students are counted as 0.10 FTEs
 - Students coded as severely disabled counted as 3.0
 - Students attending P3 schools currently under a maintenance contract are deducted from the enrolment count total.
 - Students in a print-based distance education program (Code 621), online program (code 620) are not included;

15.2.2 Capital Maintenance and Renewal Funding

This funding is currently calculated in the same way as infrastructure maintenance and renewal funding. However, it may also be informed by each board's CMR budget submission.

15.3 Maintenance and Renewal Funding Schedule

15.3.1 Infrastructure Maintenance and Renewal Funding

In April of each year, school jurisdictions may receive up to 100 percent of their annual IMR funding allocation. Education will withhold funding allocations for any school jurisdiction that has not fulfilled the reporting requirements. All future IMR allocations are withheld until the required paperwork has been submitted and approved.

15.3.2 Capital Maintenance and Renewal Funding

In May and September of each year, school jurisdictions may receive up to 50 percent of their annual CMR funding allocation. Education will withhold funding allocations for any school jurisdiction that has not fulfilled the reporting requirements. All future CMR allocations are withheld until the required paperwork has been submitted and approved.

15.4 Maintenance and Renewal Reporting

Education is one of many provincial ministries whose building assets are managed through Infrastructure's IT system called VFA. This system contains information on both supported and non-supported school buildings and building components, their expected life-cycle, condition, replacement costs and funding expended for maintenance, repair and replacement.

Keeping building and component data up-to-date in the VFA system is important to ensure that government has accurate information for evaluation and decision-making.

For the Infrastructure maintenance and renewal program, jurisdictions are required to report their projects in VFA by December of each year. The December report is for the previous school year. Jurisdictions are required to update VFA and provide Capital Planning with [Form 3 – Statement of Final Costs](#) (SFC) as well as a VFA.

For the CMR program, jurisdictions are required to report quarterly on their eligible projects. Please see the following reporting requirement schedule:

Quarter 1: CMR Program-Level Reporting and Substituted Project Lists (Exception based)

- School authorities are required to submit their CMR Project List template with details on the project changes that will impact the list submitted at the previous budget cycle. These include projects that have been:
 - Added to the list since the last budget cycle (new emergent projects); and
 - Cancelled or deferred past the three-year list.
- Exception reporting for Quarter 1 will be due to Capital Planning in the month of May.

Quarter 2: Per Project Reporting

- School authorities are required to submit their CMR Project List template with details on all projects that are currently ongoing or have funding committed to them.
- Per Project reporting for the current fiscal year for Quarter 2 will be due to Capital Planning in the month of August.
- School authorities will also be required to submit the CMR Project List template (three-year CMR plan) in August to assist in completing their 2024/25 CMR submission.

Quarter 3: No Reporting Requirement

Quarter 4: CMR Program-Level Reporting and Substituted Project Lists (Exception based) and Actuals to Date

- School authorities are required to submit a CMR Project List template with details on the project changes that will impact the list submitted at the previous budget cycle and actuals on CMR projects that have been completed to date. These include projects that have been:
 - Added to the list since the Quarter 1 report (new emergent projects);
 - Cancelled or deferred past the three-year list; and
 - Actuals from completed projects to date.

The deadline for completing Program Level and Substituted Project Reporting will be in March of each year.

Statement of Final Cost and VFA Update

- School authorities are required to complete and submit their Statement of Final Cost report by June 30.
- This includes an up to date VFA report that contains a summary of all closed/completed projects undertaken during the previous fiscal year (April 1 to March 31).

Budget Submission – Three-Year CMR Plan Submissions

- A comprehensive list of scored and prioritized projects that are planned to be completed over the next three years is required to be submitted by September each year.
 - The list should not include projects that are planned to start in the current fiscal year, ongoing projects, or have any projects where commitments have been made.
 - The list should be project-based and indicate specific assets and systems or components (do not represent programs in a single line item).
 - A template will be provided for completion that applies a methodology to prioritize projects using several asset management criteria.
 - An information session/workshop will be held in advance of the submission deadline to support the development of their three-year CMR plans.

*Please note, CMR requirements are subject to change at anytime.

15.4.1 IMR Statement of Final Costs

Infrastructure maintenance and renewal and capital maintenance and renewal expenditures paid throughout the school year and Government of Alberta fiscal year are to be entered into the VFA system by school jurisdictions to accurately reflect the investment in maintenance or replacement of building components. It is critical that expenditure items are entered into VFA accurately to ensure that government records accurately capture deferred maintenance and total expenditures by category and that asset lists reflect components that have been refurbished, upgraded or replaced altogether.

For IMR funded projects, by December 31 of each year, school authorities are required to complete their statements of final cost reporting on IMR projects and submit them to Education at EDC.CPData@gov.ab.ca. The final cost reporting consists of the IMR funding final cost report (Excel format) which is run from the VFA system and [Form 12 – Maintenance and Renewal SFC Report Cover Sheet](#).

15.4.2 Capital Maintenance and Renewal Statement of Final Costs

School authorities are required to complete their statements of final cost reporting on CMR projects and submit them to Education at EDC.CPData@gov.ab.ca by June 30 of each year. The final cost reporting consists of the CMR funding final cost report (Excel format) which is run from the VFA system and [Form 12 – Maintenance and Renewal SFC Report Cover Sheet](#).

School jurisdictions should recognize Infrastructure maintenance and renewal and capital maintenance and renewal contributions from the GOA as revenue in the year of the corresponding IMR spending, whether expensed or capitalized. Capitalized IMR contributions have a positive effect on a school jurisdiction's annual surplus/deficit. Unexpended IMR funding will appear on the school jurisdiction's audited balance sheet as deferred revenue.

IMR and CMR funding used for capitalized expenditures related to school buildings must be treated as supported capital revenue and deferred as expended deferred capital revenue in accordance with the Audited Financial Statement Guidelines. Any other IMR capitalized grant is to be treated as jurisdiction-funded.

15.4.3 Funding and reporting for jurisdiction-owned facilities leased to other jurisdictions

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

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

For the capital maintenance and renewal program, the lessor is encouraged to submit projects associated with schools leased to francophone or charters schools.

Decisions regarding IMR and CMR planning and expenditures are the responsibility of the lessor/owner. The lessee school jurisdiction is responsible for the upgrading of the facility to meet the programming needs of students. When such a need exists, the lessee school jurisdiction includes the funding requests in its annual capital plan submission. The approval of the lessor must be obtained prior to undertaking any renovations.

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

Chapter 16

Operations and Maintenance Funding

Operations and maintenance funding is provided to all school jurisdictions, including charter schools, for the maintenance and operation of school buildings to ensure they are safe, comfortable and suitable learning environments for students.

Operations and Maintenance funding allocations

Operations and maintenance funding is divided into two distinct components. The component for weighted moving average (WMA) is not dealt with here and is explained in the current [Funding Manual for School Authorities](#). The component for the space allocation portion of the grant is summarized below with a link to the document that details the annual procedures and timelines.

This funding is different from the infrastructure maintenance and renewal funding which is used for component replacement and the upgrading of existing school facilities. Information such as gross area, designated lease space, designated outreach space and utilization are important components in the calculations of the space allocation portion of operations and maintenance funding. Definitions of these spaces are included in Chapter 11: Area, Capacity and Utilization, and detailed procedures and timelines regarding the reporting for this grant are provided in the document called Reporting of School Space Allocations for Calculation of Operations and Maintenance Grant Guidelines available on Education's website.

Chapter 17

Post-Occupancy Evaluations

17.1 Background

A Post-occupancy evaluation (POE) is a functional performance assessment based on evaluating the occupants' working environment and compatibility of the facility to their needs. A POE is related to the needs, activities, and goals of the people using the facility, or the functionality of the building to the users.

There are ways to determine if a facility has met its intended physical and functional design by measuring the results against the original intent of the design.

17.2 The Purpose of Post-Occupancy Evaluations

A POE will provide Infrastructure with the necessary data to:

- Measure the functionality of the design and how it conforms to the program intent as approved and adjust programs for repetitive facilities.
 - These are good for core school designs, which are essentially the identical facility on different sites. In this case, a POE could test the validity of the repetitive design solution, and identify improvements or changes in programming.
- Test the application of new concepts.
 - Tried-and-true concepts and ideas can lead to good practice, and new ideas are necessary to make advances. POEs can help determine how well a new concept works once applied and justify actions and expenditures.

17.3 The Benefits of Post-Occupancy Evaluations

The most significant benefits are the lessons learned, which can influence and change design criteria for future schools, as well as provide information about the schools currently in use. These include:

- identify solutions to immediate problems in facilities
- improve space utilization and feedback on building performance
- understand performance implications due to budgetary reasons
- improve design standards, guidelines and criteria

Lessons learned contribute to the development of Infrastructure's [technical design requirements](#) and inform review comments throughout the Infrastructure's technical services and procurement branch technical review process. A comprehensive listing of lessons learned is available to project teams, including school boards, in order to inform future designs, by contacting the post-occupancy evaluations (POE) Coordinator.

17.4 Project Selection

In order for a project to be considered for a POE, it must have:

1. No outstanding Construction Warranty items
2. Been occupied for between 12 and 18 months
3. A construction budget over \$3 million
4. And meet one or more of the following criteria:
 - a. A project scope that is likely to be repeated in subsequent years
 - b. A project scope that is testing new initiatives or technologies

In addition, details on the location, area, delivery method, unique functional requirements, grade structure, school board, capacity and utilization are also considered in order to ensure chosen projects, along with past POEs, cover the wide range of school variations in the province.

Post-occupancy evaluations program evaluates a broad spectrum of schools built throughout the province.

17.5 Role of the School Jurisdiction

The school jurisdiction is responsible for initial communication with the school principal to inform them that the selected school has been chosen for a post-occupancy evaluations and that the consultant will be contacting the principal in early fall to coordinate the site visit date.

The consultant team, principal, school jurisdiction's facilities director and Infrastructure's post-occupancy evaluations coordinator will visit the school between September and November. The visit consists of three consecutive days in which the school will be in typical operation with students, and this should not impact the students or staff in the school. In the case of large high schools, four observation days may be required.

The purpose of the visit is to collect quantitative and qualitative data to inform lessons learned for inclusion in the post-occupancy evaluations report.

Quantitative data is collected through a physical observation and a functional evaluation, all of which will require the consultant team to review, observe and walk through all spaces within the school. As part of this step, it is requested that a member of the school jurisdiction's facilities staff familiar with the operation of the school and the design intent do a walk through/interview with the consultant team to offer insight into the design and operation of the school. This typically takes two hours.

Qualitative data collection through surveys, interviews and focus groups require school participation. Except as noted, these shall take place concurrent with the physical and functional observation days. Data collection will include:

- Interviews will be set up with the principal and/or vice-principal, at their convenience, over the course of the observation days. This typically takes one hour.
- Interviews with other staff, teachers, custodians, and administration are informal and take place during school hours. This typically takes 10-15 minutes each.

- The POE consultant will conduct a focus group or interview with school staff, and possibly parent and student representatives. This focus group takes approximately one hour and will be scheduled by the school administration at the most convenient time possible.
- Surveys will be conducted for students, teachers/staff and facilities staff.
- Consultation with school staff. The consultant will determine if the surveys will be administered online or hard copy. This decision will be based on how the school believes the best response rate will be achieved. The consultant will determine if the surveys will be administered before, during or after the observation visit.

After the site visit and surveys are completed, the board participation is essentially complete. Occasionally, the consultant will have follow-up questions of the principal or school jurisdiction contact.

School jurisdictions may request a copy of the final post-occupancy evaluations report from the post-occupancy evaluations coordinator.

Contacts

Education	Contacts
<p>Capital Planning Sector:</p> <p>Responsible for the prioritization, implementation and funding of approved school infrastructure projects for the kindergarten to Grade 12 education system:</p> <ul style="list-style-type: none"> - developing and implementing policies, plans and strategies to support school capital planning and infrastructure - developing Education's annual Capital Plan submission - reviewing jurisdiction capital funding requests - undertaking value scoping exercises as required - prioritizing capital submissions - reviewing and prioritizing jurisdiction's modular requests - review Infrastructure Maintenance and Renewal (IMR) plans and reports - developing a 10-year strategic capital plan, including enrolment projections - developing policy related to - Capital Maintenance and Renewal (CMR) - design standards - utilization 	<p>Executive Director 780-643-1455</p> <p>Director, Capital Planning North 587-385-8603</p> <p>Director, Capital Planning South 780-644-5752</p> <p>Director, Strategic Capital Planning 780-415-5854</p>
<p>K-12 Fiscal Oversight Sector:</p> <p>Responsible for developing and administering the department's overall corporate budget and manages the K-12 funding framework; oversees financial reporting and monitoring services for the department and school authorities</p> <ul style="list-style-type: none"> - Operations and Maintenance (O & M) grant - CMR payments to school authorities 	<p>Director, School Finance 780-422-0865</p> <p>Director, Financial Reporting and Accountability 780-415-9355</p> <p>Director, Budget and Fiscal Analysis 780-422-0311</p>

Education	Contacts
<ul style="list-style-type: none"> - Other payments as necessary - Capital Program fiscal oversight 	
<p>Education Supports Sector:</p> <p>Responsible for promoting an inclusive education system for children and students. through:</p> <ul style="list-style-type: none"> - policy direction - approves funding - provides school accreditation services - administers programs - builds system capacity and students 	<p>Executive Director 780-422-6554</p> <p>Learner Services Director 780-422-6551</p> <p>School Accreditation, Standards & Print Services Director 780-422-6527</p> <p>School and Community Supports Director 780-422-5045</p>
<p>Field Services Sector:</p> <p>Responsible for promoting system effectiveness with school jurisdictions, monitors for compliance on accountability/assurance requirements, and fosters innovation and continuous improvement.</p>	<p>Executive Director, Field Services Sector 780-427-5378</p> <p>Indigenous and North Services Director 780-427-5411</p> <p>Central Services Director 780-415-8324</p> <p>South Services Director 780-427-5379</p> <p>Red Tape Reduction & Student Records Director 780-644-5579</p> <p>Policy and Priorities Director 780-422-0795</p>

Infrastructure	Contacts
<p>Learning Facilities Branch:</p> <p>Responsible for leading the development of the provincial Capital Plan, which addresses the provincial infrastructure needs of Alberta's population that support key social programs and services and economic development through:</p> <ul style="list-style-type: none"> - implementation of approved capital projects - project management support - providing oversight for jurisdiction managed projects - grant payments, including F&E, CTS - procuring modular classrooms - project design - tendering - cost analysis - facility evaluations 	<p>Executive Director, Learning Facilities Branch 780 886-7581</p> <p>Director, Program Management and Integration 780-915-4727</p> <p>Director, North, Learning Facilities 780-886-7581</p> <p>Director, Central, Learning Facilities 587-982-4860</p> <p>Director, South, Learning Facilities</p> <p>Post Occupancy Evaluation Coordinator 587-590-3904</p>

Glossary

A	
Adjusted Enrolment	The adjusted enrolment for a school uses a Student Allowance Factor to account for the additional space required by some students with diverse needs for the effective and safe delivery of programs. Students with severe disabilities are counted at a factor of three.
Approval	"Approval" must be obtained from Education for every school building project intended by a school jurisdiction, as stipulated within the <i>Education Act</i> (section 195).
Area	Numerical amount of space that is typically expressed in square meters.
Area Exemption	Instructional areas in a school exempted from inclusion in the calculation of the rated capacity.
C	
Capacity	The capacity of a new school and the method by which it is established as approved. Records of capacity for all Alberta schools are maintained and reflect the capacity established at the time of construction, minus any exclusions or exemptions subsequently approved
Capital Funding	Funding provided to school jurisdictions for school building projects in accordance with Education's approved budget schedule.
Capital Plan	(Refer to Section 2)A three-year plan submitted by school jurisdictions which prioritizes capital project needs using its program delivery criteria.
Career and Technology Studies (CTS)	CTS is a provincially authorized curriculum for Alberta secondary schools designed on a pathways model to offer flexible programming using 1-credit courses
Conditions of Engagement	Refers to the Recommended Conditions of Engagement and Schedule of Professional Fees for Building Projects.
Construction Phase	A stage in the development of the project that occurs after the construction contract has been awarded and until the certificate of substantial completion has been issued.
Consultant	An individual or entity retained by a school jurisdiction to provide specific services during a prescribed period.
Contract and Grant Review Committee (CRC)	The CGRC is a standing committee established by the authority of the Deputy Minister. It is responsible for all contract and grant related recommendations and activities, including reviewing all requests, regardless of the dollar value, in consideration of criteria and informs its recommendations based on demonstrated alignment with the criteria.
Core Area	The space that is provided to meet the needs of the regular curriculum, including administrative and service areas.
Core School	A school building that is constructed with a permanent core and can be expanded or contracted by the addition or removal of modular classrooms.
Cost Consultant	An individual who has attained the professional designation of Professional Quantity Surveyor as conferred by the Canadian Institute of Quantity Surveyors

	(CIQS), or who has achieved the requisite equivalent level of academic and experimental achievement to be accepted as a professional member in CIQS. Cost consultant firms should have at least one Professional Quantity Surveyor acting on their behalf as a principal to be considered as viable candidates to provide cost consulting services.
E	
Early Childhood Services (ECS)	ECS programming offered by school jurisdictions prior to compulsory schooling that meets the diverse needs of young children and their families, pursuant to section 21 of the <i>Education Act</i> .
Educational Impact Assessment (EIA)	Educational Impact Assessment, included as part of a school jurisdiction's project funding request.
Elementary School	A facility which provides school space for grades 1 through 6 and Kindergarten.
Exempt Instructional Capacity	Instructional areas in a school exempted from inclusion in the calculation of the rated capacity.
Expenditure Plan	How school jurisdictions anticipate to spend their IMR funding allocation for the upcoming school year
F	
Facility	Site, building or space within a building, which serves a number of specified space functions.
Facility Evaluation	An assessment of facility characteristics, which includes site, architectural and engineering components, maintenance planning, safety, space adequacy and environment protection, to determine the ability of the building to accommodate current and future needs.
Fiscal Year	The Government of Alberta fiscal year starts on April 1 and ends on March 31 of the following year.
Furniture and Equipment	Includes basic furnishings including desks, seating, storage cabinets, and tables that are normally provided under a contract separate from the general construction contract.
G	
Gross Area	The area within the perimeter of a school building that is measured from outside to outside of the building's exterior finish.
Grant-Funded Project	School capital projects delivered by school jurisdictions that have received grant funding from Education and Infrastructure.
I	
Impacted Schools	Existing schools which will potentially have student enrolment impact with the approval of a proposed capital project.
Infrastructure Maintenance and Renewal (IMR) program	Provides funding to (a) replace building and site components which have failed and pose health and safety problems for students and staff, (b) extend the useful life of school facilities and sites and (c) maintain the quality of the school environment.
Infrastructure Project	A project involving the design, construction, renovation, expansion, alteration, modernization, upgrading, rehabilitation, redevelopment, restoration, replacement, maintenance, repair, or demolition of a building, road, bridge, water treatment facility or other civil engineering works.
Instructional Area	Those areas of a school building that are designated for purposes of instruction, examinations and other student activities where direct or indirect student-teacher interaction is maintained or scheduled. Also included are storage areas considered directly related to various instructional areas (i.e., gym storage, drama storage and science preparation areas).

L	
Legislation	Refers to the <i>Education Act</i> and regulations.
Location Factor	Additional funding for construction, provided on a square metre basis, for projects that are distant from the closest major urban centre. See also Major Urban Centres.
M	
Major Urban Centers	Defined in this manual as geographic locations in Alberta such as Edmonton, Calgary, Red Deer, Lethbridge, Medicine Hat, Fort McMurray, Grande Prairie and Lloydminster.
Modernization Project	The restoration of an entire, or a portion of, a school facility to improve its functional adequacy and suitability for present and future educational programs.
Modular	A building material or component developed as a standard, which can be variously fitted together or has been designed as a detachable unit fitted for a specific purpose, such as a classroom or laboratory.
Modular Classroom	Prototypical portable classroom units built at a central location and transported to schools across Alberta. These units are based on specifications that ensure significantly improved heating and ventilation, soundproofing, resistance to mold, ease of serviceability and several other factors that differentiate them for the older portables that are also part of schools across the province. The Government of Alberta's goal is to eventually replace all the older portables with the prototypical modular classrooms.
Modular Links	A modular connecting link is the connecting corridor used when attaching modular classrooms to the permanent building. A connecting link is normally built using wood frame construction and should be no larger than is necessary to provide sufficient setback from the permanent structure to meet the Alberta Building Code requirements for fire separation.
N	
Non-Instructional Area	Areas of a school building that are designated for administration, general storage, staff room and staff work area, infirmary, washroom, shower and change rooms, mechanical and electrical areas, entrances, circulation areas, elevators, ramps, and exterior walls.
O	
Operations and Maintenance Funding	Funding provided to address the costs associated with the maintenance and operation of schools to ensure they are safe, comfortable and a suitable learning environment for students.
P	
Payment Schedule	The percentages of payment to school jurisdictions that will be issued by Education for the support of approved school building projects. See section 6.5, Figure 4.
Post-Occupancy Evaluation (POE)	A functional performance assessment based on evaluating the occupants' working environment and compatibility of the facility to their needs
Prime Consultant	A professional consultant or consulting firm appointed by a school jurisdiction to design and administer a capital project and to direct sub-consultants. The consultant team should consist of a minimum of an architect, structural, mechanical and electrical engineers.
S	
School Building	A building used for the instruction or accommodation of students that is owned or occupied by (i) a school jurisdiction, (ii) a school jurisdiction and a municipality, or (iii) a school jurisdiction and another person.

School Capacity	The maximum number of students a school facility would ideally be able to accommodate.
School Capital Needs	The capital project investments identified by school authorities.
Site Plan	This shows the full dimensions of the entire school site including the school, its location, the orientation of the modular classrooms and connecting link (if required), as well as site access points.
Statement of Final Costs	A statement submitted that lists all actual expenditures and funding for support costs of a school building project prior to issuance of a project's final funding payment.
U	
Utilization Rate	Measures the student capacity of a school jurisdiction's facilities. The ratio is determined by dividing a jurisdiction's total adjusted student enrolment by its net capacity.
V	
VFA	An IT system contains information on both supported and non-supported school buildings and building components, their expected life-cycle, condition, replacement costs and funding expended for maintenance, repair and replacement.

Appendix A

Education Area Guidelines

Education Area Guidelines
ELEMENTARY SCHOOL (K to 6)

Capacity	INSTRUCTIONAL AREA								NON-INSTRUCTIONAL AREA												Total Non-area	Gross Area
	Cr.	Sci	Anc	Anc	Gym	Gym Stor.	Library	Total Inst. Area	Admin. & Staff	Wrap Around & Collaboration Space	Mechanical & Meter Rooms	Recycle Room (LEED)	Phys. Educ.	Circ.	Wall Area	Storage Area	Washrms Area	Accessible Washroom Facility	Flexible Space	Wiring Network		
210	(4 @ 80) 320	(1 @ 95) 95	(1 @ 130) 130	(2 @ 90) 180	430	43	80	1,278	150	20	108	11	50	320	153	45	24	12	48	30	971	2,249
255	(6 @ 80) 480	(1 @ 95) 95	(1 @ 130) 130	(2 @ 90) 180	430	43	100	1,458	227	20	108	11	50	365	175	51	30	12	60	30	1,138	2,596
300	(8 @ 80) 640	(1 @ 95) 95	(1 @ 130) 130	(2 @ 90) 180	430	43	120	1,638	227	20	108	11	50	410	197	57	36	12	72	30	1,229	2,867
345	(10 @ 80) 800	(1 @ 95) 95	(1 @ 130) 130	(2 @ 90) 180	430	43	140	1,818	227	20	108	11	70	455	218	64	42	12	84	30	1,340	3,158
400	(11 @ 80) 880	(2 @ 95) 190	(1 @ 130) 130	(2 @ 90) 180	430	43	160	2,013	227	20	162	11	70	503	242	70	48	12	96	30	1,491	3,504
445	(12 @ 80) 960	(2 @ 95) 190	(1 @ 130) 130	(3 @ 90) 270	430	43	180	2,203	307	30	162	11	70	551	264	77	54	12	108	30	1,676	3,879
495	(14 @ 80) 1,120	(2 @ 95) 190	(1 @ 130) 130	(3 @ 90) 270	430	43	200	2,383	307	30	162	11	70	596	286	83	60	12	120	30	1,767	4,150
540	(16 @ 80) 1,280	(2 @ 95) 190	(1 @ 130) 130	(3 @ 90) 270	430	43	220	2,563	307	30	162	11	70	641	308	90	66	12	132	30	1,858	4,421
590	(17 @ 80) 1,360	(3 @ 95) 285	(1 @ 130) 130	(3 @ 90) 270	430	43	240	2,758	307	30	189	11	70	690	331	97	72	12	144	30	1,982	4,740
650	(18 @ 80) 1,440	(3 @ 95) 285	(2 @ 130) 260	(3 @ 90) 270	595	59.5	260	3,170	397	40	189	11	95	792	380	111	78	24	156	30	2,304	5,473
695	(20 @ 80) 1,600	(3 @ 95) 285	(2 @ 130) 260	(3 @ 90) 270	595	59.5	280	3,350	397	40	189	11	95	837	402	117	84	24	168	30	2,395	5,744
740	(22 @ 80) 1,760	(3 @ 95) 285	(2 @ 130) 260	(3 @ 90) 270	595	59.5	300	3,530	397	40	189	11	95	882	424	124	90	24	180	30	2,485	6,015
795	(23 @ 80) 1,840	(4 @ 95) 380	(2 @ 130) 260	(3 @ 90) 270	595	59.5	320	3,725	397	40	216	22	95	931	447	130	96	24	192	30	2,620	6,345
840	(24 @ 80) 1,920	(4 @ 95) 380	(2 @ 130) 260	(4 @ 90) 360	595	59.5	340	3,915	472	50	216	22	95	979	470	137	102	24	204	30	2,800	6,715
890	(26 @ 80) 2,080	(4 @ 95) 380	(2 @ 130) 260	(4 @ 90) 360	595	59.5	360	4,095	472	50	216	22	95	1,024	491	143	108	24	216	30	2,891	6,986

**Education Area Guidelines
5 to 9 SCHOOL**

Capacity	INSTRUCTIONAL AREA										NON-INSTRUCTIONAL AREA											Total Non-area	Gross Area	
	Cr.	Sci	Anc	Anc	Inform. Services	Career Technology Studies	Gym	Stor.	Library	Total Inst. Area	Admin. & Staff	Wrap Around & Collaboration Space	Mechanical & Meter Rooms	Recycle Room (LEED)	Phys. Educ.	Circ.	Wall Area	Storage Area	Washrms Area	Accessible Washroom Facility	Flexible Space			Wiring Network
235	(4 @ 80) 320	(1 @ 120) 120	(1 @ 130) 130	(1 @ 90) 90	(1 @ 115) 115	(1 @ 142) 142	430	43	88	1,478	150	20	108	11	100	370	177	52	26	12	53	40	1,119	2,597
280	(5 @ 80) 400	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	(1 @ 142) 142	430	43	108	1,668	227	20	108	11	100	417	200	58	32	12	65	40	1,291	2,959
325	(7 @ 80) 560	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	(1 @ 142) 142	430	43	128	1,848	227	20	108	11	100	462	222	65	38	12	77	40	1,382	3,230
370	(9 @ 80) 720	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	(1 @ 142) 142	595	60	148	2,210	227	20	108	11	130	552	265	77	44	12	89	40	1,576	3,786
435	(9 @ 80) 720	(2 @ 120) 240	(1 @ 130) 130	(2 @ 90) 180	(2 @ 115) 230	(1 @ 142) 142	595	60	168	2,465	227	20	162	11	130	616	296	86	50	12	101	40	1,751	4,216
485	(10 @ 80) 800	(2 @ 120) 240	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	(1 @ 142) 142	595	60	188	2,655	307	30	162	11	130	664	319	93	56	12	113	40	1,936	4,591
525	(11 @ 80) 880	(2 @ 120) 240	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	(2 @ 142) 284	595	60	206	2,895	307	30	162	11	130	724	347	101	62	12	124	40	2,050	4,944
570	(13 @ 80) 1040	(2 @ 120) 240	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	(2 @ 142) 284	595	60	226	3,075	307	30	162	11	130	769	369	108	68	12	136	40	2,141	5,215
625	(14 @ 80) 1120	(3 @ 120) 360	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	(2 @ 142) 284	595	60	246	3,295	307	30	189	11	130	824	395	115	74	12	148	40	2,275	5,569
685	(15 @ 80) 1200	(3 @ 120) 360	(2 @ 130) 260	(3 @ 90) 270	(2 @ 115) 230	(2 @ 142) 284	815	82	266	3,767	397	40	189	11	160	942	452	132	80	24	160	40	2,626	6,392
735	(16 @ 80) 1280	(3 @ 120) 360	(2 @ 130) 260	(3 @ 90) 270	(3 @ 115) 345	(2 @ 142) 284	815	82	286	3,982	397	40	189	11	160	995	478	139	86	24	172	40	2,731	6,712
780	(18 @ 80) 1440	(3 @ 120) 360	(2 @ 130) 260	(3 @ 90) 270	(3 @ 115) 345	(2 @ 142) 284	815	82	306	4,162	397	40	189	11	160	1,040	499	146	92	24	184	40	2,822	6,983
835	(19 @ 80) 1520	(4 @ 120) 480	(2 @ 130) 260	(3 @ 90) 270	(3 @ 115) 345	(2 @ 142) 284	815	82	326	4,382	397	40	216	22	160	1,095	526	153	98	24	196	40	2,967	7,348
880	(19 @ 80) 1520	(4 @ 120) 480	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	(3 @ 142) 426	815	82	344	4,632	472	50	216	22	160	1,158	556	162	103	24	206	40	3,169	7,801
925	(21 @ 80) 1680	(4 @ 120) 480	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	(3 @ 142) 426	815	82	364	4,812	472	50	216	22	160	1,203	577	168	109	24	218	40	3,260	8,072
970	(23 @ 80) 1840	(4 @ 120) 480	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	(3 @ 142) 426	1060	106	384	5,261	472	50	216	22	200	1,315	631	184	115	24	230	40	3,500	8,761
1035	(23 @ 80) 1840	(5 @ 120) 600	(2 @ 130) 260	(4 @ 90) 360	(4 @ 115) 460	(3 @ 142) 426	1060	106	404	5,516	472	50	270	22	200	1,379	662	193	121	24	242	40	3,676	9,192
1125	(27 @ 80) 2160	(5 @ 120) 600	(2 @ 130) 260	(4 @ 90) 360	(4 @ 115) 460	(3 @ 142) 426	1060	106	444	5,876	547	60	270	22	200	1,469	705	206	133	24	266	40	3,942	9,818
1225	(28 @ 80) 2240	(6 @ 120) 720	(2 @ 130) 260	(5 @ 90) 450	(4 @ 115) 460	(4 @ 142) 568	1060	106	482	6,346	547	60	297	22	200	1,587	762	222	145	24	289	40	4,194	10,540

**Education Area Guidelines
JUNIOR HIGH SCHOOL (7 to 9)**

Capacity	INSTRUCTIONAL AREA										Total Instructional Area	NON-INSTRUCTIONAL AREA										Total Non-Instructional Area	Total Gross Area		
	Classroom	Science	Ancillary	Ancillary	Services	Career	Gymnasium	Storage	Library	Information Technology		Administration & Staff	Wrap Around	Mechanical	Recycle	Physical Education	Circulation	Wall Area	Storage Area	Washroom Area	Accessible			Flexible Space	Wiring Network
						Studies							& Collaboration Space	& Meter Rooms	Room (LEED)						Washroom Facility				
230	(4 @ 80) 320	(1 @ 120) 120	(1 @ 130) 130	(1 @ 90) 90	(1 @ 115) 115	(1 @ 142) 142	430	43	88			150	20	108	11	100	370	177	52	26	12	53	40	1,119	2,597
275	(5 @ 80) 400	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	(1 @ 142) 142	430	43	108			227	20	108	11	100	417	200	58	32	12	65	40	1,291	2,959
320	(6 @ 80) 480	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	(2 @ 142) 284	430	43	126			227	20	108	11	100	477	229	67	38	12	76	40	1,404	3,312
410	(8 @ 80) 640	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	(2 @ 142) 284	595	60	146			227	20	108	11	130	567	272	79	44	12	88	40	1,599	3,868
475	(8 @ 80) 640	(2 @ 120) 240	(1 @ 130) 130	(2 @ 90) 180	(2 @ 115) 230	(2 @ 142) 284	595	60	166			227	20	162	11	130	631	303	88	50	12	100	40	1,774	4,298
520	(9 @ 80) 720	(2 @ 120) 240	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	(2 @ 142) 284	595	60	186			307	30	162	11	130	679	326	95	56	12	112	40	1,959	4,673
565	(10 @ 80) 800	(2 @ 120) 240	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	(3 @ 142) 426	595	60	204			307	30	162	11	130	739	355	103	61	12	122	40	2,072	5,027
605	(12 @ 80) 960	(2 @ 120) 240	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	(3 @ 142) 426	595	60	224			307	30	162	11	130	784	376	110	67	12	134	40	2,163	5,298
660	(13 @ 80) 1040	(3 @ 120) 360	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	(3 @ 142) 426	595	60	244			307	30	189	11	130	839	403	117	73	12	146	40	2,297	5,652
765	(14 @ 80) 1120	(3 @ 120) 360	(2 @ 130) 260	(3 @ 90) 270	(2 @ 115) 230	(3 @ 142) 426	815	82	264			397	40	189	11	160	957	459	134	79	24	158	40	2,648	6,475
820	(14 @ 80) 1120	(3 @ 120) 360	(2 @ 130) 260	(3 @ 90) 270	(3 @ 115) 345	(4 @ 142) 568	815	82	282			397	40	189	11	160	1,025	492	144	85	24	169	40	2,776	6,877
860	(16 @ 80) 1280	(3 @ 120) 360	(2 @ 130) 260	(3 @ 90) 270	(3 @ 115) 345	(4 @ 142) 568	815	82	302			397	40	189	11	160	1,070	514	150	91	24	181	40	2,867	7,148
915	(17 @ 80) 1360	(4 @ 120) 480	(2 @ 130) 260	(3 @ 90) 270	(3 @ 115) 345	(4 @ 142) 568	815	82	322			397	40	216	22	160	1,125	540	158	97	24	193	40	3,012	7,513
960	(18 @ 80) 1440	(4 @ 120) 480	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	(4 @ 142) 568	815	82	342			472	50	216	22	160	1,173	563	164	103	24	205	40	3,192	7,883
1005	(19 @ 80) 1520	(4 @ 120) 480	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	(5 @ 142) 710	815	82	360			472	50	216	22	160	1,233	592	173	108	24	216	40	3,305	8,237
1045	(21 @ 80) 1680	(4 @ 120) 480	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	(5 @ 142) 710	1060	106	380			472	50	216	22	200	1,345	646	188	114	24	228	40	3,545	8,926
1110	(21 @ 80) 1680	(5 @ 120) 600	(2 @ 130) 260	(4 @ 90) 360	(4 @ 115) 460	(5 @ 142) 710	1060	106	400			472	50	270	22	200	1,409	676	197	120	24	240	40	3,721	9,357
1215	(25 @ 80) 2000	(5 @ 120) 600	(2 @ 130) 260	(4 @ 90) 360	(4 @ 115) 460	(6 @ 142) 852	1060	106	448			547	60	270	22	200	1,537	738	215	134	24	269	40	4,055	10,201
1320	(27 @ 80) 2160	(6 @ 120) 720	(2 @ 130) 260	(5 @ 90) 450	(4 @ 115) 460	(6 @ 142) 852	1060	106	488			547	60	297	22	200	1,639	787	229	146	24	293	40	4,284	10,840

**Education Area Guidelines
ELEMENTARY/JUNIOR HIGH (K to 9)**

Capacity	INSTRUCTIONAL AREA											NON-INSTRUCTIONAL AREA											Total Non-area	Gross Area	
	Cr.	Sci	Elem. Sci		Anc	Infor. Services	Career Technology Studies	Gym	Gym Stor.	Library	Total Inst. Area	Admin. & Staff	Wrap Around & Collaboration Space	Mechanical & Meter Rooms	Recycle Room (LEED)	Phys. Educ.	Circ.	Wall Area	Storage Area	Washrms Area	Accessible Washroom Facility	Flexible Space			Wiring Network
			Anc	Anc																					
235	(4 @ 80) 320	(1 @ 120) 120		(1 @ 130) 130	(1 @ 90) 90	(1 @ 115) 115	(1 @ 142) 142	430	43	88	1,478	150	20	108	11	75	370	177	52	26	12	53	40	1,094	2,572
280	(5 @ 80) 400	(1 @ 120) 120		(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	(1 @ 142) 142	430	43	108	1,668	227	20	108	11	75	417	200	58	32	12	65	40	1,266	2,934
325	(7 @ 80) 560	(1 @ 120) 120		(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	(1 @ 142) 142	430	43	128	1,848	227	20	108	11	75	462	222	65	38	12	77	40	1,357	3,205
370	(9 @ 80) 720	(1 @ 120) 120		(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	(1 @ 142) 142	515	52	148	2,122	227	20	108	11	100	530	255	74	44	12	89	40	1,510	3,632
420	(10 @ 80) 800	(1 @ 120) 120	(1 @ 95) 95	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	(1 @ 142) 142	515	52	168	2,317	227	20	162	11	100	579	278	81	50	12	101	40	1,661	3,978
465	(11 @ 80) 880	(1 @ 120) 120	(1 @ 95) 95	(1 @ 130) 130	(3 @ 90) 270	(1 @ 115) 115	(1 @ 142) 142	515	52	188	2,507	307	30	162	11	100	627	301	88	56	12	113	40	1,846	4,353
510	(13 @ 80) 1040	(1 @ 120) 120	(1 @ 95) 95	(1 @ 130) 130	(3 @ 90) 270	(1 @ 115) 115	(1 @ 142) 142	515	52	208	2,687	307	30	162	11	100	672	322	94	62	12	125	40	1,937	4,624
555	(15 @ 80) 1200	(1 @ 120) 120	(1 @ 95) 95	(1 @ 130) 130	(3 @ 90) 270	(1 @ 115) 115	(1 @ 142) 142	515	52	228	2,867	307	30	162	11	100	717	344	100	68	12	137	40	2,028	4,895
610	(16 @ 80) 1280	(2 @ 120) 240	(1 @ 95) 95	(1 @ 130) 130	(3 @ 90) 270	(1 @ 115) 115	(1 @ 142) 142	515	52	248	3,087	307	30	189	11	100	772	370	108	74	12	149	40	2,162	5,249
680	(16 @ 80) 1280	(2 @ 120) 240	(1 @ 95) 95	(2 @ 130) 260	(3 @ 90) 270	(2 @ 115) 230	(1 @ 142) 142	705	71	268	3,561	397	40	189	11	130	890	427	125	80	24	161	40	2,514	6,075
720	(18 @ 80) 1440	(2 @ 120) 240	(1 @ 95) 95	(2 @ 130) 260	(3 @ 90) 270	(2 @ 115) 230	(1 @ 142) 142	705	71	288	3,741	397	40	189	11	130	935	449	131	86	24	173	40	2,605	6,346
765	(20 @ 80) 1600	(2 @ 120) 240	(1 @ 95) 95	(2 @ 130) 260	(3 @ 90) 270	(2 @ 115) 230	(1 @ 142) 142	705	71	308	3,921	397	40	189	11	130	980	470	137	92	24	185	40	2,696	6,617
815	(21 @ 80) 1680	(2 @ 120) 240	(2 @ 95) 190	(2 @ 130) 260	(3 @ 90) 270	(2 @ 115) 230	(1 @ 142) 142	705	71	328	4,116	397	40	216	22	130	1,029	494	144	98	24	197	40	2,831	6,946
860	(22 @ 80) 1760	(2 @ 120) 240	(2 @ 95) 190	(2 @ 130) 260	(4 @ 90) 360	(2 @ 115) 230	(1 @ 142) 142	705	71	348	4,306	472	50	216	22	130	1,076	517	151	104	24	209	40	3,011	7,316
905	(24 @ 80) 1920	(2 @ 120) 240	(2 @ 95) 190	(2 @ 130) 260	(4 @ 90) 360	(2 @ 115) 230	(1 @ 142) 142	705	71	368	4,486	472	50	216	22	130	1,121	538	157	110	24	221	40	3,102	7,587
950	(25 @ 80) 2000	(2 @ 120) 240	(2 @ 95) 190	(2 @ 130) 260	(4 @ 90) 360	(2 @ 115) 230	(2 @ 142) 284	940	94	386	4,984	472	50	216	22	165	1,246	598	174	116	24	232	40	3,355	8,339
1015	(25 @ 80) 2000	(3 @ 120) 360	(2 @ 95) 190	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	(2 @ 142) 284	940	94	406	5,239	472	50	270	22	165	1,310	629	183	122	24	244	40	3,530	8,769
1100	(29 @ 80) 2320	(3 @ 120) 360	(2 @ 95) 190	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	(2 @ 142) 284	940	94	446	5,599	547	60	270	22	165	1,400	672	196	134	24	268	40	3,797	9,396
1200	(31 @ 80) 2480	(3 @ 120) 360	(3 @ 95) 285	(2 @ 130) 260	(5 @ 90) 450	(3 @ 115) 345	(2 @ 142) 284	940	94	486	5,984	547	60	297	22	165	1,496	718	209	146	24	292	40	4,016	10,000

Education Area Guidelines
ELEMENTARY/JUNIOR/SENIOR HIGH (K to 12)

Capacity	INSTRUCTIONAL AREA									Total Inst. Area	NON-INSTRUCTIONAL AREA											Total Non-area	Gross Area	
	Cr.	Sci	Anc	Anc	Inform. Services	Career Technology Studies	Gym	Gym Stor.	Library		Admin. & Staff	Wrap Around & Collaboration Space	Mechanical & Meter Rooms	Recycle Room (LEED)	Phys. Educ.	Circ.	Wall Area	Storage Area	Washrms Area	Accessible Washroom Facility	Flexible Space			Wiring Network
230	(4 @ 80) 320	(1 @ 120) 120	(1 @ 130) 130	(1 @ 90) 90	(1 @ 115) 115	(1 @ 142) 142	430	43	88	1,478	150	20	108	11	100	370	177	52	26	12	53	40	1,119	2,597
275	(5 @ 80) 400	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	(1 @ 142) 142	430	43	108	1,668	227	20	108	11	100	417	200	58	32	12	65	40	1,291	2,959
320	(7 @ 80) 560	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	(1 @ 142) 142	430	43	128	1,848	227	20	108	11	100	462	222	65	38	12	77	40	1,382	3,230
365	(9 @ 80) 720	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	(1 @ 142) 142	595	60	148	2,210	227	20	108	11	130	552	265	77	44	12	89	40	1,576	3,786
425	(9 @ 80) 720	(2 @ 120) 240	(1 @ 130) 130	(2 @ 90) 180	(2 @ 115) 230	(1 @ 142) 142	595	60	168	2,465	227	20	162	11	130	616	296	86	50	12	101	40	1,751	4,216
475	(10 @ 80) 800	(2 @ 120) 240	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	(1 @ 142) 142	595	60	188	2,655	307	30	162	11	130	664	319	93	56	12	113	40	1,936	4,591
515	(12 @ 80) 960	(2 @ 120) 240	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	(1 @ 142) 142	595	60	208	2,835	307	30	162	11	130	709	340	99	62	12	125	40	2,027	4,862
560	(14 @ 80) 1120	(2 @ 120) 240	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	(1 @ 142) 142	595	60	228	3,015	307	30	162	11	130	754	362	106	68	12	137	40	2,118	5,133
615	(15 @ 80) 1200	(3 @ 120) 360	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	(1 @ 142) 142	595	60	248	3,235	307	30	189	11	130	809	388	113	74	12	149	40	2,252	5,487
670	(15 @ 80) 1200	(3 @ 120) 360	(2 @ 130) 260	(3 @ 90) 270	(2 @ 115) 230	(2 @ 142) 284	815	82	266	3,767	397	40	189	11	160	942	452	132	80	24	160	40	2,626	6,392
720	(16 @ 80) 1280	(3 @ 120) 360	(2 @ 130) 260	(3 @ 90) 270	(3 @ 115) 345	(2 @ 142) 284	815	82	286	3,982	397	40	189	11	160	995	478	139	86	24	172	40	2,731	6,712
765	(18 @ 80) 1440	(3 @ 120) 360	(2 @ 130) 260	(3 @ 90) 270	(3 @ 115) 345	(2 @ 142) 284	815	82	306	4,162	397	40	189	11	160	1,040	499	146	92	24	184	40	2,822	6,983
820	(19 @ 80) 1520	(4 @ 120) 480	(2 @ 130) 260	(3 @ 90) 270	(3 @ 115) 345	(2 @ 142) 284	815	82	326	4,382	397	40	216	22	160	1,095	526	153	98	24	196	40	2,967	7,348
865	(20 @ 80) 1600	(4 @ 120) 480	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	(2 @ 142) 284	815	82	346	4,572	472	50	216	22	160	1,143	549	160	104	24	208	40	3,147	7,718
910	(22 @ 80) 1760	(4 @ 120) 480	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	(2 @ 142) 284	815	82	366	4,752	472	50	216	22	160	1,188	570	166	110	24	220	40	3,238	7,989
950	(24 @ 80) 1920	(4 @ 120) 480	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	(2 @ 142) 284	1060	106	386	5,201	472	50	216	22	200	1,300	624	182	116	24	232	40	3,478	8,679
1015	(24 @ 80) 1920	(5 @ 120) 600	(2 @ 130) 260	(4 @ 90) 360	(4 @ 115) 460	(2 @ 142) 284	1060	106	406	5,456	472	50	270	22	200	1,364	655	191	122	24	244	40	3,653	9,109
1100	(27 @ 80) 2160	(5 @ 120) 600	(2 @ 130) 260	(4 @ 90) 360	(4 @ 115) 460	(3 @ 142) 426	1060	106	444	5,876	547	60	270	22	200	1,469	705	206	133	24	266	40	3,942	9,818
1200	(29 @ 80) 2320	(6 @ 120) 720	(2 @ 130) 260	(5 @ 90) 450	(4 @ 115) 460	(3 @ 142) 426	1060	106	484	6,286	547	60	297	22	200	1,572	754	220	145	24	290	40	4,171	10,457

**Education Area Guidelines
JUNIOR/SENIOR HIGH (7 to 12)**

Capacity	INSTRUCTIONAL AREA										Total Instructional Area	NON-INSTRUCTIONAL AREA											Total Non-Instructional Area	Total Gross Area		
	Classroom	Science	Ancillary	Ancillary	Services	Career	Gymnasium	Storage	Library	Information		Technology	Administration & Staff	Wrap Around	Mechanical	Recycle	Physical Education	Circulation	Wall Area	Storage Area	Washroom Area	Accessible			Flexible Space	Wiring Network
						Studies								& Collaboration Space	& Meter Rooms	Room (LEED)						Washroom Facility				
230	(4 @ 80) 320	(1 @ 120) 120	(1 @ 130) 130	(1 @ 90) 90	(1 @ 115) 115	(1@142) 142	490	49	94			1,550	150	20	108	11	105	387	186	54	26	12	53	40	1,153	2,702
275	(5 @ 80) 400	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	(1@142) 142	490	49	115			1,741	227	20	108	11	105	435	209	61	32	12	65	40	1,325	3,066
320	(6 @ 80) 480	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	(2@142) 284	490	49	134			1,982	227	20	108	11	105	495	238	69	38	12	76	40	1,439	3,421
435	(8 @ 80) 640	(1 @ 120) 120	(1 @ 130) 130	(2 @ 90) 180	(1 @ 115) 115	(2@142) 284	645	65	155			2,334	227	20	108	11	138	583	280	82	44	12	88	40	1,633	3,966
500	(8 @ 80) 640	(2 @ 120) 240	(1 @ 130) 130	(2 @ 90) 180	(2 @ 115) 230	(2@142) 284	645	65	176			2,590	227	20	162	11	138	647	311	91	50	12	100	40	1,808	4,398
545	(9 @ 80) 720	(2 @ 120) 240	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	(2@142) 284	645	65	198			2,781	307	30	162	11	138	695	334	97	56	12	112	40	1,994	4,775
590	(10 @ 80) 800	(2 @ 120) 240	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	(3@142) 426	645	65	217			3,022	307	30	162	11	138	756	363	106	61	12	122	40	2,108	5,130
630	(12 @ 80) 960	(2 @ 120) 240	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	(3@142) 426	645	65	238			3,204	307	30	162	11	138	801	384	112	67	12	134	40	2,199	5,403
685	(13 @ 80) 1040	(3 @ 120) 360	(1 @ 130) 130	(3 @ 90) 270	(2 @ 115) 230	(3@142) 426	645	65	259			3,425	307	30	189	11	138	856	411	120	73	12	146	40	2,334	5,758
765	(14 @ 80) 1120	(3 @ 120) 360	(2 @ 130) 260	(3 @ 90) 270	(2 @ 115) 230	(3@142) 426	935	94	281			3,975	397	40	189	11	170	994	477	139	79	24	158	40	2,718	6,693
820	(14 @ 80) 1120	(3 @ 120) 360	(2 @ 130) 260	(3 @ 90) 270	(3 @ 115) 345	(4@142) 568	935	94	300			4,251	397	40	189	11	170	1,063	510	149	85	24	169	40	2,847	7,098
860	(16 @ 80) 1280	(3 @ 120) 360	(2 @ 130) 260	(3 @ 90) 270	(3 @ 115) 345	(4@142) 568	935	94	321			4,432	397	40	189	11	170	1,108	532	155	91	24	181	40	2,938	7,370
915	(17 @ 80) 1360	(4 @ 120) 480	(2 @ 130) 260	(3 @ 90) 270	(3 @ 115) 345	(4@142) 568	935	94	342			4,654	397	40	216	22	170	1,163	558	163	97	24	193	40	3,084	7,737
960	(18 @ 80) 1440	(4 @ 120) 480	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	(4@142) 568	935	94	363			4,845	472	50	216	22	170	1,211	581	170	103	24	205	40	3,264	8,109
1005	(19 @ 80) 1520	(4 @ 120) 480	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	(5@142) 710	935	94	383			5,086	472	50	216	22	170	1,272	610	178	108	24	216	40	3,378	8,464
1045	(21 @ 80) 1680	(4 @ 120) 480	(2 @ 130) 260	(4 @ 90) 360	(3 @ 115) 345	(5@142) 710	1190	119	404			5,548	472	50	216	22	220	1,387	666	194	114	24	228	40	3,633	9,181
1110	(21 @ 80) 1680	(5 @ 120) 600	(2 @ 130) 260	(4 @ 90) 360	(4 @ 115) 460	(5@142) 710	1190	119	425			5,804	472	50	270	22	220	1,451	696	203	120	24	240	40	3,809	9,613
1215	(25 @ 80) 2000	(5 @ 120) 600	(2 @ 130) 260	(4 @ 90) 360	(4 @ 115) 460	(6@142) 852	1190	119	476			6,317	547	60	270	22	220	1,579	758	221	134	24	269	40	4,145	10,462
1320	(27 @ 80) 2160	(6 @ 120) 720	(2 @ 130) 260	(5 @ 90) 450	(4 @ 115) 460	(6@142) 852	1190	119	519			6,730	547	60	297	22	220	1,682	808	236	146	24	293	40	4,375	11,104

Appendix B

Infrastructure Maintenance and Renewal (IMR) Program Funding Priorities and Project Categories

Event Types (Table Title)	Definition	Example
Failure and Life Cycle Replacement	Replacement of one technical component for another having the capacity to perform the original function based on actual failure or observed deterioration that can reasonably predict remaining actual service life. Replacement may arise from obsolescence, lack of parts, cumulative effect of wear and tear, premature failure, or destruction through exposure to fire or other hazard. Start year for this event type must be 2015 or beyond.	Roof has wet insulation and has been previously patched. Roof will require replacement in two years. Or Roof has major defects and requires replacement immediately. Or Roof has no deficiencies. Theoretical life is 25 years. If roof is 15 years old, replace in 10 years. If roof is 25 years old, replace now.
Repair	Work to restore a damaged or worn-out technical component of a normal operating condition. This may require the replacement of damaged or worn-out parts.	Repair roof leak. Replace flashing around chimney.
Code Repair	Work required to affect compliance with the code under which the original facility, additions or major alterations were designed. In the absence of records, it is generally assumed that buildings were built according to the code in place at the time of construction. However, evaluations may reveal non-compliance with the relevant code at the time of construction or the authorities having jurisdiction over the code may deem newer requirements to be retroactive. Action to correct this non-compliance is considered a code repair.	Patch holes in ceiling that forms part of a fire separation.
Hazardous Materials Abatement	Work to contain or remove materials that are an immediate hazard to building occupants	Replace ceiling tiles that contain asbestos. Fibers falling on staff.
Study	Study to determine the need for and the scope of an event. Provide two events: one for the cost of the study and one to correct the deficiency with an order of magnitude cost	Study to determine scope and cost for new ceiling system
Code Upgrade	Work which the current Building Code requires for new buildings but is not retroactive for buildings built prior to the current code. This work may be required if there is a major renovation or change in use of a facility. It may also be determined that the work should be done to meet acceptable standards.	Install sprinkler system

Event Types (Table Title)	Definition	Example
Barrier Free Access Upgrade	Work that addresses a situation that is not a retroactive code requirement but would significantly improve accessibility for persons with physical or sensory mobility restrictions.	Widen doors to all washrooms
Indoor Air Quality Upgrade	Work that addresses a situation that is not a retroactive code requirement but would improve indoor air quality.	New or expanded ventilation system to meet current occupational health and safety indoor air quality standards.
Energy Efficiency Upgrade	Work that will reduce energy consumption, with a maximum of a 6- year payback period. Recommendations should include an estimate of “payback” time and note if work must be done in conjunction with other work to be financially viable	Replace classroom lighting with high efficiency fixtures.
Program Functional Upgrade	Changes to the interior arrangements or other physical characteristics of an existing facility or installed equipment so that it can be used more effectively for its currently designated program or adapted to a new use.	Enlarge CTS room; Replace good condition but dated carpet to improve building image. Install computer room security system. Increase electrical panel capacity for future loads
Operating Efficiency Upgrade	Changes to the interior arrangements or other physical characteristics of an existing facility or installed equipment so that it can be operated more efficiently. Recommendations should include an estimate of “payback” time and/or note if work must be done in conjunction with other work to be financially viable	Replace carpet with tile to reduce the cost

Appendix C

IMR and O&M Space Allocation Funding Policy for Jurisdiction-Owned School Space

	Type of Use	Rent/Lease Charges Allowable	Area Included or Excluded for IMR Calculations	Area Included or Excluded for O&M Space Allocation Funding
1	Closed school (subject to Section 62 of the <i>Education Act</i>)	N/A	Included at 50 per cent of school space	Excluded
1b	Closed School - used for school admin	N/A	Excluded	Excluded
1c	Closed School – used for Outreach Programs	N/A	Included	Excluded
2a	Lease to Cross-Government Sector – except for 1b & 1c	Cost or Nominal Fee	Included	Included
3	Lease to Non-Profit Sector (Including ECS, Private Operators)	Cost or Nominal Fee	Included	Included
4	Lease to Charter School	N/A	IMR funding provided to lessor in lieu of lease funding	Not provided to Lessor or to Charter School
5	Lease to Accredited Private Schools	No Maximum or Minimum	Excluded	Excluded
6	Lease to Registered Private Schools	No Maximum or Minimum	Excluded	Excluded
7	Lease to Private Sector for non-Private School Use.	No Maximum or Minimum	Excluded	Excluded
8	Board owned non-school building – used for Outreach Programs	N/A	Excluded	Excluded

Appendix D

Project Delivery Types – General Information

1) Design-Bid-Build (DBB)

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

- Design – a design contract is awarded to a consultant using a value based approach.
- Bid – using the documentation developed by the consultant, construction bid documents are prepared. Contractors submit competitive, lump sum bids and the construction contract is typically awarded to the lowest compliant bidder in a lump sum bid scenario, or highest scoring compliant bidder in a value based competition.
- Build – the successful contractor moves into the construction phase of the project. The owner maintains responsibility for monitoring the contractor's performance until the project is completed.

2) Design-Build (DB)

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

School jurisdictions may use a DB initiative, subject to Infrastructure's approval, as an alternate construction program for approved school building projects of any size. DB procurement integrates the consultant (designer of record) and the general contractor throughout the project.

The DB approach uses the Request for Proposals (RFP) procurement process. In this process, DB firms submit a bid to complete the project. The construction contract is typically awarded to the lowest compliant bidder in a lump sum bid scenario, or highest scoring compliant bidder in a value based competition. The criteria for selecting a design-build firm must be quantifiable and information on the criteria and the method of selection must be made available to all entities in this arrangement – the owner and the Design-Builder. The DB entity is usually led by a contractor who forms a contract with the design firm

Infrastructure employs a DB variant by engaging a bridging consultant to develop the design drawings to approximately 25 per cent. This ensures that a basis of design is established which the design-builder must follow.

The following conditions also apply:

- School jurisdictions must provide an assurance that the project will be completed within the approved budget.
- A DB contract in excess of \$200,000 must be publicly tendered on the [Alberta Purchasing Connection](#) website.
- A stipulated price form of contract, such as the Canadian Construction Documents Committee – CCDC-14-2013 available at <https://www.ccdc.org/>, should be used.

3) Public-Private-Partnership (P3)

For additional information on P3's refer to the Alberta Public Private Partnerships Framework and Guideline located at <https://open.alberta.ca/publications/public-private-partnership-framework-and-guideline-2020>. This method of procurement is intended solely for Government Delivery

4) Construction Management (CM)

As of November 26, 2019, the Minister of Infrastructure has restricted the use of CM to “exceptional circumstances, where no other procurement method is feasible”, and all authorizations must be sought through the Deputy Minister of Infrastructure for its use.

Subject to approval, school jurisdictions may use a CM approach as an alternate method of construction for approved school building projects of any size. This approach allows the design and construction roles to overlap, thereby potentially reducing the overall project schedule. It can also help with more informed decision-making.

This approach uses a two phase procurement process:

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

The criteria for selecting a construction management firm must be quantifiable, the information on the criteria and the method of selection must be made available to all proponents.

The school jurisdiction must identify what type of CM services they will be procuring: Construction Manager as Agent (refer to CCDC 5A – Construction Management Services & CCDC 5B – Construction Management Services and Construction) or Construction Manager as Contractor. A rationale for the type of CM services procured and the project specific roles and responsibilities of the CM to be performed as part of the contract agreement, should be provided to the Regional Director in Learning Facilities Branch, Infrastructure.

The following conditions also apply:

- All sub-trades that equal or exceed \$200,000 or at least 90 per cent of the total construction work must be publicly tendered on the [Alberta Purchasing Connection](#) website.
- School jurisdictions must provide an assurance that the project will be completed within the approved budget.

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

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

5) Integrated Project Delivery (IPD)

As of November 26, 2019, the Minister of Infrastructure has restricted the use of IPD to “exceptional circumstances, where no other procurement method is feasible”, and all authorizations must be sought through the Deputy Minister of Infrastructure for its use.

Subject to approval, school jurisdictions may use an Integrated Project Delivery (IPD) initiative in combination with any of the above noted procurement methods. However, IPD is most commonly associated with the CM procurement scheme.

School jurisdictions may use an IPD process, subject to Infrastructure’s approval, in conjunction with another construction process as outlined above (sections 6.2, 6.3, and 6.4) for approved school building projects of any size.

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

- The Alternative Procurement Scheme that will be used in conjunction with the IPD process and the rationale for selecting that scheme. Identify any risks and/or benefits associated with that selection.
- The IPD Coordinator (including their name, experience, roles, and responsibilities throughout the project).
- The integrated technology sharing solution selected to facilitate the project documentation, communication and work flows. Identify how this technology will be used by the project team and any risks and/or benefits associated with the selected technology solution.
- School jurisdictions must also meet all the requirements of the proposed project delivery approach (DBB, CM, DB) to be used in conjunction with the IPD process as outlined above.
- School jurisdictions must outline the anticipated benefit to utilizing IPD including the benefit or enhancements to the learning environment that will be achieved within the allocated budgets and all cost savings identified by the IPD process must revert back to the province, which will be recognized by a grant amendment reducing the consulting and construction costs.
- Construction contingency will not be released to the school jurisdictions. The province will retain the contingency until the school jurisdiction has demonstrated a need for the funding as a result of unforeseen conditions.