

School District No. 83 (North Okanagan-Shuswap)

STRATEGIC MAINTENANCE PLAN

PURPOSE OF REPORT

Staff are currently developing a 5-year strategic maintenance plan for all District facilities. The purpose of this report is to outline for the Board, the planning steps underway and the current priorities for facility maintenance.

The District's current priorities for maintenance are:

- Projects to maintain or improve the quality of the learning environment for students and staff. This is mainly HVAC and lighting upgrades to keep the temperature, air circulation and lighting suitable in classrooms.
- Projects to ensure a healthy and safe school environment, such as fire alarm panel replacement.
- Projects to protect the long-term reliability of the facility, such as roofing and flooring.

FUNDING AVAILABLE FOR MAINTENANCE

The District receives and has many sources of funding, including capital and operating funds from both the Ministry and District. Not all sources can be accessed for maintenance, as shown below:

MINISTRY CAPITAL PROGRAMS FOR FACILITIES

These programs are applied for through the annual 5-Year Capital Plan submission that staff will be bringing forward in June. Funding under Ministry capital programs cannot be used for maintenance.

- Expansion Programs
 - New Schools
 - Replacement schools
 - Additions
- Seismic Mitigation Program
- Building Envelope Program
- Property Acquisition
- Demolition
- School Enhancement Program
- Carbon Neutral Capital Program
- Accessible Playgrounds

Projects for the Ministry’s minor capital programs below require individual applications as part of the annual Capital Plan submission. There is no guarantee of funding and approval of 3 projects in any year should be considered a very successful year.

School Enhancement Program (SEP)	<p>Funding for upgrading of electrical, energy, health & safety, mechanical, building envelope, washrooms and flooring.</p> <p>The SEP program is intended for larger projects (up to \$3 million) to relieve the burden on AFG funding.</p>	<p>SD83 has historically received between 1 to 3 approved projects per year.</p> <p>Beginning in 2020/21 for 2 years, the Ministry has indicated funding approval for 2020/21 and a high probability of approval in 2021/22 to complete the geothermal project at Eagle River Secondary.</p>
Carbon Neutral Capital Program (CNCP)	<p>Funding for reduction of emissions resulting in lower operational costs.</p>	<p>The Ministry has indicated potential funding approval for a project in 2021/22. Our proposed application will be to upgrade DCC controls at Falkland Elementary and South Canoe Elementary.</p>

DISTRICT CAPITAL FUNDS

There are 2 district capital funds – Local Capital and Restricted Capital. These funds are not for maintenance, and only in an emergency could Local Capital be considered.

MINISTRY OPERATING FUNDS

The Ministry provides funding that could be used for maintenance under the two sources shown below.

Annual Facility Grant (AFG)	<p>This is specifically provided for maintenance; however, there are 13 permitted categories for spending (see <i>Appendix B</i>).</p>	<p>For SD83, this is approximately \$1.65 million per year.</p>
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K-12 Operating Funds	<p>The Ministry provides K-12 operating funds to all school districts.</p>	<p>For SD83, \$10.4 million of this is assigned to Operations via the District’s budget process but not all of it is available for facilities maintenance. A large portion is already committed as shown below.</p>
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ANNUAL FACILITY GRANT

The work underway for 2020/21 and the proposed work for the AFG submission for 2021/22 is shown in *Appendix A*.

The use of AFG funding is regulated by the Ministry. The 12 categories are shown in *Appendix B* and Districts need to report all expenditures at the end of each year, usually in October or November.

K-12 OPERATING FUNDS

The District allocates approximately \$10.4 million of the K-12 operating funds to Operations. This chart shows how that funding is allocated within the various Operations departments. Over 78% is already committed to Utilities, Transportation, Grounds and Custodial/OH&S.

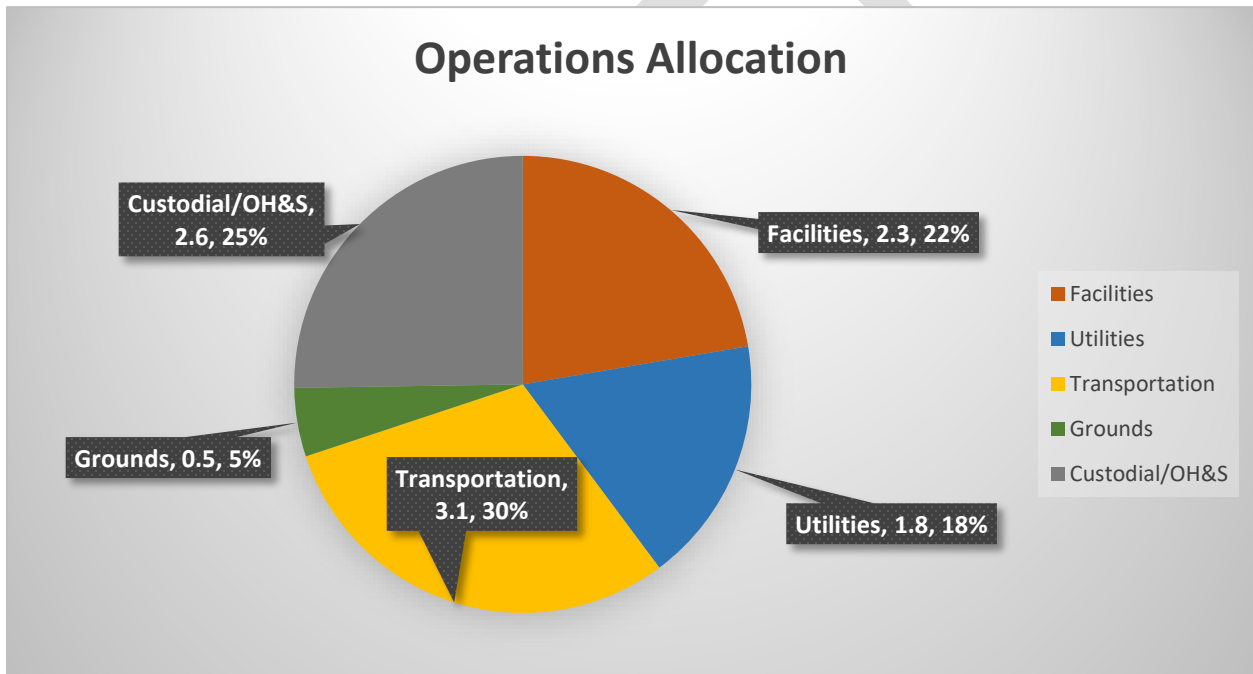


Chart 1: Operations Allocation

22% or \$2.3 million of the K-12 operating funds are allocated for facilities maintenance activities.

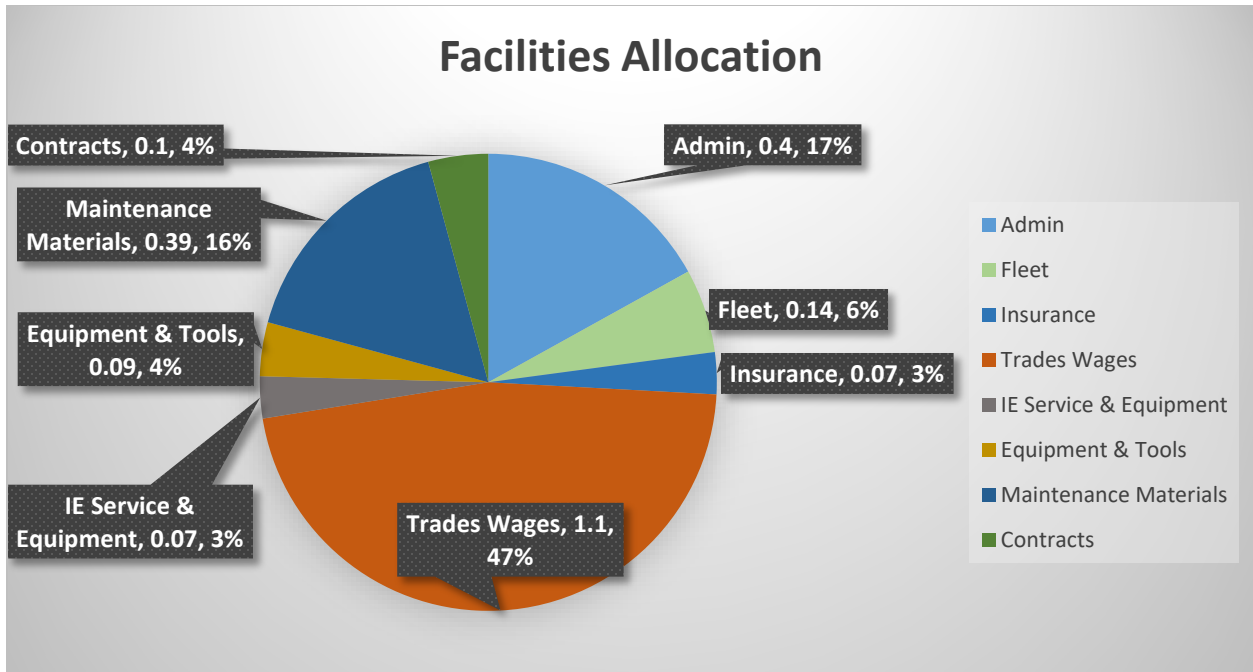


Chart 2: Facilities Maintenance Allocation

Chart 2 illustrates the break down of the \$2.3 million district facilities allocation. After fixed operating costs, approximately \$1.5 million remains for maintenance.

The choice of projects from District operating funds is largely discretionary since there is no Ministry criteria. Charts 3 & 4 show how these funds have historically been allocated.

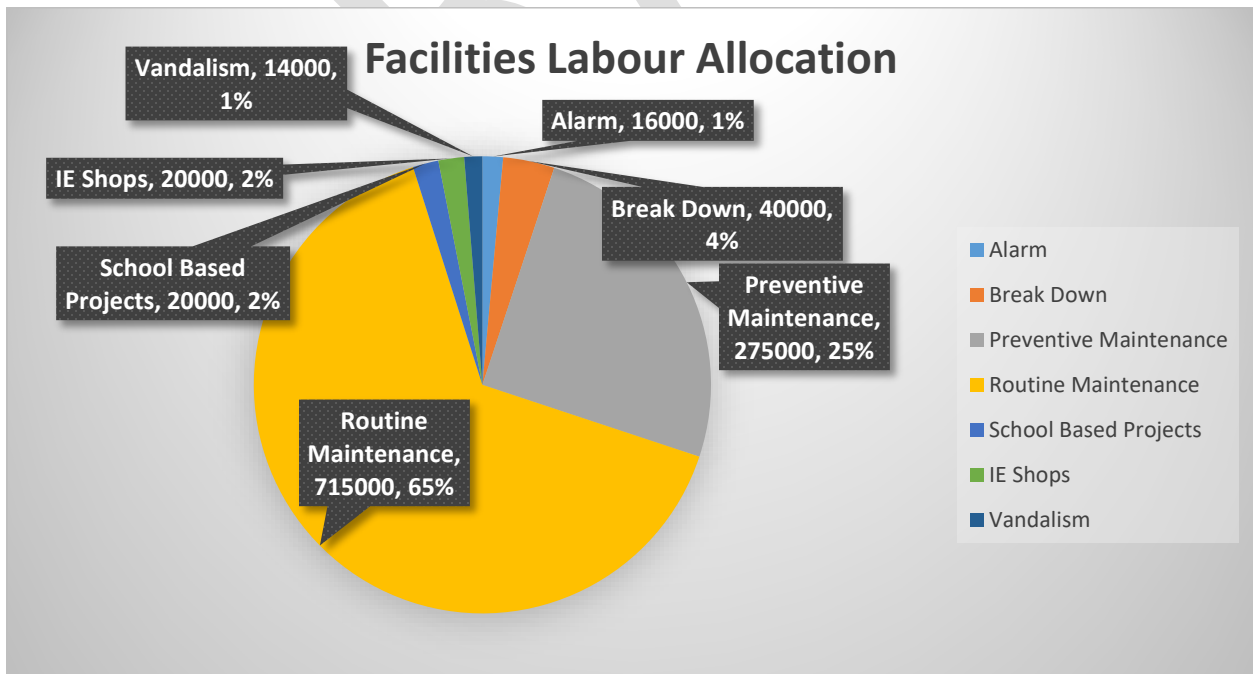


Chart 3: Facilities Maintenance Labour Allocation

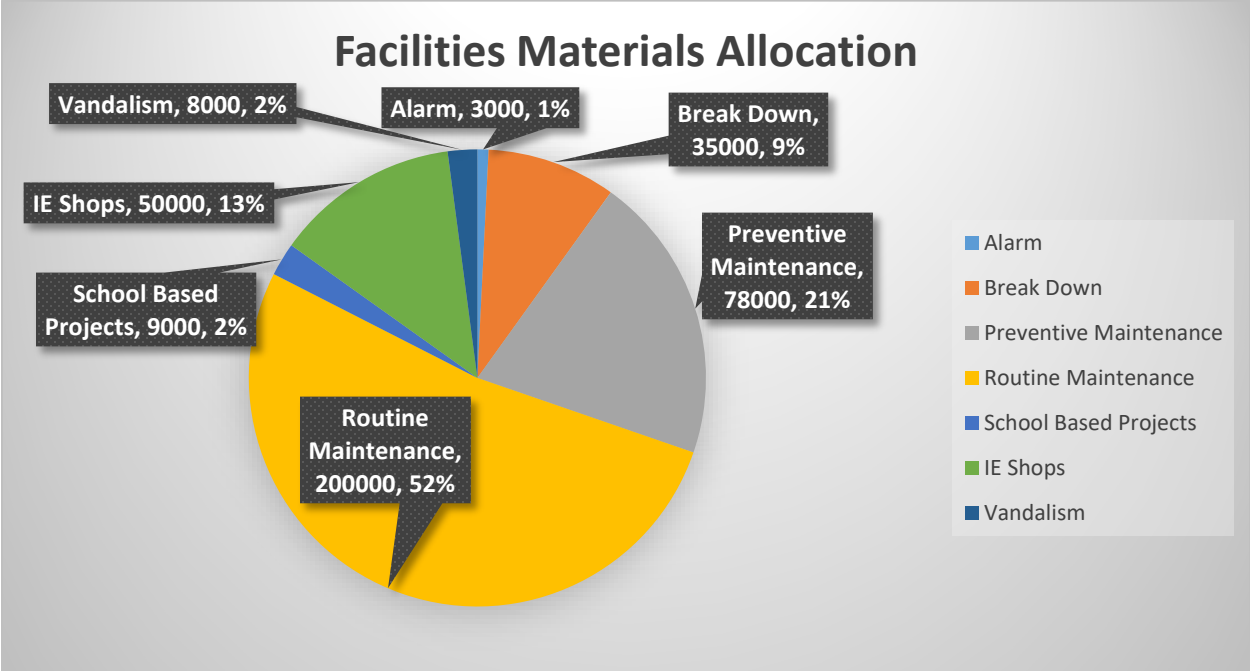


Chart 4: Facilities Maintenance Materials Allocation

In total, from District K-12 operating funds, Facilities has approximately \$1.28 million available for preventive and routine annual facilities maintenance. Approximately \$1 million in labour costs and \$280,000 for materials.

SO WHAT NEEDS MAINTAINING?

The District has 24 operating schools and several other facilities, including the District Education Support Centre, Maintenance Shop, Malakwa, Silver Creek Annex, Highland Park Annex, Gateway, Enderby Daycare, and Teen House.

Currently, the District is maintaining four closed school buildings. As the facility owner, SD83 has some fiduciary responsibilities for these buildings. Although minor maintenance has been addressed on these buildings, any significant work has been deferred for quite some time. All 4 buildings are in need of attention as shown below:

Facility	Status	Work Required	Next 1-5 Years
Malakwa	Currently leased to Malakwa Community Association	Siding, Windows, Flooring, Millwork, Hot Water Tank, Fire Alarm, Ext Stairs, etc. Further assessment is required	\$318,000

Silver Creek Annex	Currently leased to Okanagan Regional Library - open 2 days per week	Plumbing Upgrades, Siding, Windows, Doors, Paint, Hot Water Tank, Stairs, etc. Further assessment is required	\$208,000
Highland Park Annex	Currently leased out to Little Seedlings Daycare	Siding, Windows, Flooring, Millwork, Paint, Plumbing Upgrades, Fire Alarm, Fire Sprinkler, Ext Stairs, etc. Further assessment is required	\$295,000
Gateway	Currently unoccupied	Plumbing Upgrades, Electrical Upgrade, Flooring, Fire Alarm, Fire Sprinklers, etc. Further assessment is required	\$228,836

These buildings are not used for District education or student learning. Other than our fiduciary responsibilities as the building owner and to respond to needs of our tenants, Facilities is not spending any funds on these buildings.

HOW IS THIS MONEY ALLOCATED TO SCHOOL MAINTENANCE?

There are three key sources of information – Ministry facility condition reports, local district knowledge and the amount of funding available.

Ministry Facility Condition Reports

In 2004, the Ministry of Education contracted VFA Inc. to provide facility assessments of all BC public schools. VFA categorized all major building components, gave them an ID, and assigned standard life cycle expectancies to them. For example, roofing should be replaced in 30 years, flooring in 25 years, exterior doors in 30 years, etc.

VFA updates the building components annually from information provided by districts and they conduct their own audits, currently on a 4-year cycle. VFA produces a “Requirements” list identifying projects as immediate, long term, recommended, not meeting code or non-structural seismic vulnerability, all with an estimated cost.

Districts use this list as a guide for possible projects.

Local District Knowledge

There is no replacement for hands-on knowledge of what is required at a school. Where specialized expertise is required, the District may obtain advice and estimates from experienced contractors or consulting engineers (ex. 10 yr. Roofing plan, 10 yr. Mechanical Plan).

Annual Initiatives

District staff also know that allocating some funds to recurring programs every year is a wise process, such as roofing and flooring. Some of these programs that require specific technical expertise or experienced crews are completed by contract. These programs should continue.

Program	Estimated Annual Cost	Details
Roof replacement	\$500,000	Scheduled roof replacements and major roof repairs
Technology upgrades	\$20,000	Improvements to accommodate computer and telecommunications networks
Electrical upgrades	\$35,000	Fire alarms & exit lighting, lighting upgrades, panel & service upgrades
Mechanical Upgrades	\$30,000	Heating, Ventilation, Air Conditioning and Plumbing Upgrades
Flooring Replacement	\$40,000	Condition based flooring replacements
Exterior Paint	\$75,000	Refresh of Exterior Paint
Site Work	\$40,000	Sport Field Upgrades, Fencing, Paving, Concrete Repairs, Drainage, etc.
Doors and Hardware	\$25,000	Door and Hardware Replacements
Interior Upgrades	\$70,000	Renovations to Classrooms, Washrooms, Gyms, etc.
Exterior Upgrades	\$75,000	Siding, windows, building envelope
Total all programs	\$945,000	

This leaves approximately **\$700,000** to allocate amongst the 24 schools. The LRFP is currently under review and may change the maintenance plan in the future.

However, the next two years are reasonably predictable. The table in *Appendix A* identifies the current expenditure plan for 2020/21 and the suggested maintenance plan for 2021/22. District staff are continuing to identify the optimum maintenance plan for Years 3 – 5.

SUMMARY

The primary objective of the strategic Maintenance plan is to provide safe, comfortable and appropriate learning spaces for students and staff. Project priorities are determined with consideration of data from a variety of sources. The initial two years have a focus on a combination of upgrades to schools with high FCI rating, annual incentives and health and safety requirements. Staff will continue to develop a 5-year Strategic Maintenance Plan that supports the Board's Long Range Facilities Plan.

APPENDIX A

SCHOOLS MAINTENANCE PLAN

The District has received approval from the Ministry for 2020/21 capital projects and a high probability of approval for projects outlined for 2021/22.

MINISTRY CAPITAL – SCHOOL ENHANCEMENT PROGRAM

SCHOOL	2020/21		2021/22	
Eagle River Sec.	Phase 4 of geothermal heat	\$1,429,000	Phase 5 of geothermal heat	\$1,337,000

MINISTRY CAPITAL – CARBON NEUTRAL CAPITAL PROGRAM

SCHOOL	2020/21		2021/22	
Falkland Elementary, South Canoe Elementary	No approved projects	\$0.00	DCC Control upgrade	\$300,000

ANNUAL FACILITY GRANT PROJECTS (\$1.65 million available)

As previously indicated, all the annual initiatives are the first priority for AFG funding

SCHOOL	2020/21		2021/22	
Annual Initiatives are the first priority for AFG funding		\$885,000		\$795,000
A.L. Fortune	Change room Reno	\$41,000		
Eagle River	Data Wiring	\$93,000		
Falkland	Washrooms Reno	\$43,000		
Falkland			Hallway Floor	\$31,000
Falkland			Classroom Reno	
Grindrod			Exterior Upgrade	\$68,000
JL Jackson			HVAC Cooling Upgrade	\$205,000
Len Wood	Paving & Roof Drain	\$38,000		
Len Wood	Classroom Renos	\$36,000		
Len Wood			Classroom Renos	\$30,000
North Shuswap	Domestic Water Lines	\$15,000		
Parkview	Roof Drains	\$75,000		
Parkview	Hall Floor	\$42,000		
Parkview	Pavement	\$30,000		
Parkview			Hall Flooring Phase 2	\$38,000
Parkview			Install Sprinkler System	\$185,000
Parkview			Washroom Upgrade	\$33,000

Parkview			Classroom Renos	\$30,000
Pleasant Valley	Gym Floor and Reno	\$211,000		
Pleasant Valley			Washroom Upgrades	\$40,000
Sorrento	Interior Doors	\$22,000		
South Canoe	Exterior Upgrade	\$119,000		
South Canoe			Fire Alarm	\$40,000
South Canoe			Exterior Upgrade Phase 2	\$155,000
Total AFG		\$1,650,000		\$1,650,000

OTHER PROJECTS FUNDED FROM DISTRICT OPERATING FUNDS

SCHOOL	2020/21		2021/22	
Various Sites	Well Water and Lead Testing	\$80,000	Lead Testing	\$80,000
All Sites	DDC Graphics	\$75,000		
All Sites	Lead in Water Mitigation	\$30,000	Lead in Water Mitigation	\$30,000
Various Sites	Fire Pump & Generator Testing	\$15,000	Fire Pump & Generator Testing	\$15,000
All Sites	Fire extinguisher Certification	\$20,000	Fire extinguisher Certification	\$20,000
All Sites	Fire system testing	\$15,000	Fire system testing	\$15,000
Various Sites	Elevator and Lifts	\$20,000	Elevator and Lifts	\$20,000
Various Sites	IE Shop Maintenance	\$70,000	IE Shop Maintenance	\$70,000
Grindrod Elementary	Interior Painting	\$20,000		
Silver Creek Elementary			Classroom Upgrades	\$20,000

OTHER PROJECTS REQUIRING FUNDING SOURCE

SCHOOL	2020/21		2021/22	
Various Sites	IE Shop Ventilation	\$900,000	IE Shop Ventilation	\$600,000

To determine the actual ventilation needs of the District's Industrial Education shops, further program review is required. Once program needs are established, further assessment of required ventilation upgrades will be provided. There is currently no identified funding source for these upgrades.

ANNUAL FACILITY GRANT FUNDING CATEGORIES

The [Annual Facility Grant](#) is part of the Asset Rehabilitation and Maintenance suite of funding programs which include the Building Envelope Program (BEP), the Carbon Neutral Capital Program (CNCP) and the School Enhancement Program (SEP).

AFG funding is provided to boards of education to be used at their discretion to address maintenance priorities and ensure schools are safe and well-functioning.

There are now 13 categories of eligible Annual Facility Grant expenditures. These categories mean that not every maintenance activity can be charged to AFG. Other maintenance activities need to be charged to the District maintenance operating allocation.

- **Roof Replacements** (scheduled roof replacements and major roof repairs)
- **Mechanical System Upgrades** (improvements, replacements or provision of heating, ventilation, air conditioning or plumbing systems)
- **Electrical System Upgrades** (improvements or replacements of power supply and distribution systems)
- **Facility Upgrades** (improvements to protect the fabric of the building, including exterior painting, window and door replacement, building envelope repair and replacement, structural and non-structural seismic mitigation)
- **Loss Prevention** (improvements, replacements or provision of fire protection system)
- **Functional Improvements** (improvements of school facilities related to the provision of educational programming)
- **Technology Infrastructure Upgrades** (improvements to accommodate computer and telecommunications networks)
- **Site Upgrades** (site improvements including positive site drainage; repairs to sidewalks, parking lots, site access/egress, paved work areas, paved play areas, and play fields; repairs, upgrading or replacement of playground equipment; perimeter safety fencing; contaminated soil remediation; underground storage tanks removal)
- **Disabled Access** (improvements related to access for persons with physical disabilities)
- **Asbestos Abatement** (mitigation and/or remediation of asbestos affected areas)
- **Health and Safety Upgrades** (improvements related to indoor air quality, traffic safety, and non-structural upgrades)
- **Site Servicing** (improvements, replacements or provision of sewer, drainage or water services; underground irrigation systems)