



ALGONQUIN AND LAKESHORE CATHOLIC DISTRICT SCHOOL BOARD

POLICY STATEMENT

PUPIL ACCOMMODATION REVIEW

Rationale

The Algonquin and Lakeshore Catholic District School Board is responsible for deciding the most appropriate pupil accommodation arrangements for the delivery of its elementary and secondary programs. These decisions are made by the Board of Trustees in the context of fulfilling the primary responsibilities of fostering student achievement and spiritual well-being, and ensuring effective stewardship of Board resources. In some cases, to address changing student populations, this requires the Board to consider undertaking pupil accommodation reviews that may lead to school consolidations and closures

Guiding Principles

- i. This Policy applies to schools of the Board offering elementary and/or secondary programs and must be read together with the Administrative Procedures and related Schedules for this Policy. The Administrative Procedures and related Schedules, may be amended from time to time in accordance with this Policy.
- ii. The application of this policy shall be consistent with the Ministry of Education's *Pupil Accommodation Review Guideline (PARG)*. In all cases the minimum timelines set out in the PARG will be followed by the Board.
- iii. The Board will develop a Long Term Capital Plan (LTCP) that addresses the future facility needs of students. The LTCP and planning process will provide the context for pupil accommodation review processes and decisions.
- iv. Wherever practical, pupil accommodation reviews should focus on a group of schools within a planning area of the Board rather than examine a single school. The goal of providing a suitable and equitable range of learning opportunities in a school or a group of schools requires monitoring and active curriculum and programming decisions. Decisions that might require consolidation, closure or major program relocations should take into account the needs of all the students in all of the schools in a particular group. There may, however, be circumstances in which a single school should be studied for closure
- v. Wherever possible, schools will be subject to a pupil accommodation review only once in a five-year period, unless there are circumstances that necessitate an earlier review, as determined by the Board, such as a significant change in enrolment.

- vi. The Board welcomes the opportunity for the public and affected school communities to be heard during pupil accommodation reviews. The Board will share relevant information with those affected by the process.
- vii. The Board of Trustees will make the final decision regarding any pupil accommodation review.
- viii. This Policy outlines the process the Board will undertake to complete a pupil accommodation review process or a modified pupil accommodation review process.

Process

1. The pupil accommodation review process consists of the following:
 - Preparation and submission of an Initial Staff Report and School Information Profile(s);
 - Approval by the Board of Trustees to undertake a pupil accommodation review process;
 - Establishment of the Pupil Accommodation Review Committee (PARC) (including its Terms of Reference);
 - Consultation with Local Municipal Governments/Community Partners;
 - Pupil Accommodation Review Public Meetings;
 - Preparation and submission of a Final Staff Report, including a Community Consultation section;
 - Public Delegations to the Board of Trustees;
 - Preparation and submission of a Final Staff Report with Public Delegation Addendum;
 - Decision by the Board of Trustees; and,
 - Establishment of a Transition Committee.
2. A PARC may include representatives from the broader community, as provided in the Administrative Procedures.
3. A modified pupil accommodation review process may be initiated by the Board of Trustees where two (2) or more of the following factors are present:
 - Distance to the nearest available accommodation is within five (5) kilometers of one another;
 - Utilization rate of the facility is equal or below 50%;
 - Number of students enrolled at the school is 100 or fewer)
 - When the Board is planning the relocation (in any school year or over a number of school years) of a program, in which the enrolment constitutes more than or equal to 50% of the school's enrolment (this calculation is based on the enrolment at the time of the relocation, or the first phase of a relocation carried over a number of school years);
 - There are no more than three (3) schools subject to the pupil accommodation review process; or
 - The entire student population of a school that is subject to a pupil accommodation review process can be accommodated in another school without a boundary change.

4. The modified pupil accommodation review process consists of the following steps:
 - Preparation and submission of an Initial Staff Report and School Information Profile(s);
 - Approval by the Board of Trustees to undertake a modified pupil accommodation review process;
 - Consultation with Local Municipal Governments/Community Partners;
 - A Pupil Accommodation Review Public Meeting;
 - Preparation and submission of a Final Staff Report, including a Community Consultation Section;
 - Public Delegations to the Board of Trustees;
 - Preparation and submission of a Final Staff Report with Public Delegation Addendum;
 - Decision by the Board of Trustees; and,
 - Establishment of a Transition Committee.

5. The Board may decide not to undertake a pupil accommodation review in any of the following circumstances:
 - Where a replacement school is to be built by the Board on the existing site, or built or acquired within the existing school attendance boundary, as identified by the Board, including in its relevant policies;
 - Where a replacement school is to be built by the Board on the existing site, or built or acquired within the existing school attendance boundary and the school community must be temporarily relocated to ensure the safety of students and staff during the reconstruction, as identified by the Board, including in its relevant policies;
 - When a lease for the school is terminated;
 - When the Board is planning the relocation (in any school year or over a number of school years) of grades or programs, in which the enrolment constitutes less than 50% of the school's enrolment (this calculation is based on the enrolment at the time of the relocation, or the first phase of a relocation carried over a number of school years);
 - When the Board is repairing or renovating a school, and the school community must be temporarily relocated to ensure the safety of students during the renovations;
 - Where a facility has been serving as a holding school for a school community whose permanent school is over-capacity and/or is under construction or repair; or
 - Where there are no students enrolled at the school at any time throughout the school year.

References

1. *MEMORANDUM 2015:B09: Release of New Pupil Accommodation Review Guideline and Community Planning and Partnerships Guideline – (Gabriel F. Sékaly ADM to Directors of Education)*

- 1.1 *Ministry of Education Pupil Accommodation Review Guideline, March 2015*
- 1.2 *Ministry of Education Community Planning and Partnerships Guideline, March 2015*
2. *ALCDSB POLICY A-2011-02-4 Pupil Accommodation Review*
 - 2.1 *ADMINISTRATIVE PROCEDURES: Pupil Accommodation Review*

Approved: Month Day, 2016

DRAFT



ALGONQUIN AND LAKESHORE CATHOLIC DISTRICT SCHOOL BOARD

ADMINISTRATIVE PROCEDURES

PUPIL ACCOMMODATION REVIEW (Policy Statement: Pupil Accommodation Review)

Purpose

These procedures are to be read in conjunction with the Board's *Pupil Accommodation Review Policy Statement X-0000-00-0* and the Ministry of Education's *Pupil Accommodation Review Guideline (PARG)* (March 2015).

A copy of Board Policy X-0000-00-0 and this Procedure, together with the *Pupil Accommodation Review Guideline* and *Administrative Review of Pupil Accommodation Review Process*, issued by the Minister of Education, are available to the public at the Board Office and on the Board's website.

This Procedure incorporates the following Schedules:

Schedule A-School Information Profile

Schedule B-Template Terms of Reference for the Pupil Accommodation Review Committee

Schedule C-Pupil Accommodation Review Timeline (Regular)

Schedule D-Pupil Accommodation Review Timeline (Modified)

This Procedure and any Schedules may be amended from time to time, so long as such amendments are made in accordance with the Ministry of Education's *Pupil Accommodation Review Guideline* and Board Policy X-0000-00-0.

References

1. *MEMORANDUM 2015:B09: Release of New Pupil Accommodation Review Guideline and Community Planning and Partnerships Guideline – (Gabriel F. Sékaly ADM to Directors of Education)*
 - 1.1 *Ministry of Education Pupil Accommodation Review Guideline, March 2015*
 - 1.2 *Ministry of Education Community Planning and Partnerships Guideline, March 2015*
2. *ALCDSB POLICY A-2011-02-4 Pupil Accommodation Review*
 - 2.1 *ADMINISTRATIVE PROCEDURES: Pupil Accommodation Review*

Definitions

Pupil Accommodation Review: A process, described in the Board Policy and this Procedure, undertaken by the Board to determine the future of a school or group of schools.

Pupil Accommodation Review Committee (PARC): An advisory committee established by the Board that represents the affected school(s) of a Pupil Accommodation Review, which acts as the official conduit for information shared between the Board and the affected school communities.

Pupil Accommodation Review Public meeting: An open meeting held by Board staff to gather broader community feedback on a Pupil Accommodation Review.

PARC working meeting: A meeting of PARC members to discuss a Pupil Accommodation Review, including the gathering of feedback from the affected school communities of a Pupil Accommodation Review.

Business day: A calendar day that is not a weekend or statutory holiday. It also does not include calendar days that fall within the Board's Christmas, spring, and summer break. For schools with a year-round calendar, any break that is five (5) calendar days or longer is not a business day.

Consultation: The sharing of relevant information as well as providing the opportunity for municipalities and other community partners, the public and affected school communities to be heard.

Facility Condition Index (FCI): A building condition as determined by the Ministry of Education by calculating the ratio between the five-year renewal needs and the replacement value for each facility.

On-the-ground (OTG) capacity: The capacity of the school as determined by the Ministry of Education by loading all instructional spaces within the facility to current Ministry standards for class size requirements and room areas.

Public delegation: A group of individuals making a presentation to the Board of Trustees at a Regular Meeting of the Board in accordance with Board policies.

Initial Staff Report (Report 1): A report drafted by Board staff containing option(s) and identifying a preferred option with a recommendation to Trustees with respect to a school or schools that should be subject to a Pupil Accommodation Review process or a modified Pupil Accommodation Review process.

Final Staff Report (Report 2): A report drafted by Board staff to the Board of Trustees with respect to a Pupil Accommodation Review process or a modified Pupil Accommodation Review process that also incorporates information obtained during community consultations. The Final Staff Report may, or may not, include the same option(s) as contained in the Initial Staff Report related to a Pupil Accommodation Review process.

Final Staff Report with Public Delegation Addendum (Report 3): The Final Staff Report drafted by Board staff that also incorporates information obtained from public delegations (and any staff response to such information) as an addendum.

School Information Profile (SIP): An orientation document with point-in-time data for each of the schools under a Pupil Accommodation Review.

Procedures

1. Initial Staff Report

- 1.1 Board staff will prepare and submit to the Board of Trustees an Initial Staff Report and a School Information Profile (“SIP”) for each school that may be subject to review.
- 1.2 The Initial Staff Report will identify accommodation issue(s) and will contain:
 - One or more options to address the accommodation issue(s) with supporting rationale;
 - A recommended option if more than one option is presented;
 - Proposed timelines for implementation of each option; and information about actions taken by Board staff prior to recommending a Pupil Accommodation Review process and supporting rationale as to any actions taken or not taken.
- 1.3 The option(s) included in the Initial Staff Report must address the following:
 - Summary of accommodation issue(s) for the school(s) under review;
 - Where students would be accommodated;
 - If proposed changes to existing facility or facilities are required as a result of the Pupil Accommodation Review;
 - Identify any program changes as a result of the proposed option;
 - How student transportation would be affected if changes take place;
 - If new capital investment is required as a result of the Pupil Accommodation Review, how the Board intends to fund this, as well as a proposal on how students would be accommodated if funding does not become available;
 - Any relevant information obtained from municipalities and other community partners prior to the commencement of the Pupil Accommodation Review, including any confirmed interest in using the underutilized space; and
 - A timeline for implementation.
- 1.4 The Initial Staff Report and School Information Profiles (“SIPs”) will be available to the public at the schools subject to the Pupil Accommodation Review and on the Board’s website following the decision to proceed with a Pupil Accommodation Review by the Board of Trustees.

2. School Information Profile

- 2.1 Board staff are required to develop SIPs as orientation documents to help the Pupil Accommodation Review Committee (“PARC”) and the community understand the context surrounding the decision to include the specific school(s) in a Pupil Accommodation Review.
- 2.2 Board staff will complete a SIP, at the same point-in-time, for each of the schools under review.
- 2.3 Schedule A provides an outline of the SIP including the minimum data requirements and required criteria to be considered.
- 2.4 The Board may introduce additional items that reflect local circumstances and priorities which may help to further understand the school(s) under review.

3. Pupil Accommodation Review Committee

- 3.1 Following consideration of the Initial Staff Report and approval to proceed but prior to the first Pupil Accommodation Review Public Meeting, the Board will establish a Pupil Accommodation Review Committee (PARC) that represents the school(s) under review. The PARC provides feedback to the Board on behalf of the affected school communities and acts as an official conduit for information shared between the Board and the school communities.
- 3.2 The members of the PARC will be:
 - At least one parent / guardian representative from each school under review and one alternate parent/guardian, chosen by the school community; and
 - Such other persons as appointed by the Director of the Board. A Trustee(s) may participate on the Committee as ad hoc member(s).
- 3.3 The Director of Education will appoint the Chair of the PARC. The Board will provide the PARC with Terms of Reference that describe the following:
 - i. Mandate of the PARC
 - ii. Membership of the PARC
 - iii. Role and Responsibilities of the PARC
 - iv. Meetings of the PARC
- 3.4 A template for the Terms of Reference is set out as Schedule B.
- 3.5 The Board will invite PARC members from the school(s) under review to an orientation session that will describe the mandate, roles and responsibilities, and procedures of the PARC.

- 3.6 Board staff from various areas of responsibility, such as School Superintendents, School Principal(s), Finance, Plant and Planning and Transportation staff members, may be assigned to act as resources to the PARC.

4. Consultation with Local Municipal Governments/Community Partners

- 4.1 Within five (5) business days of the Board of Trustees' decision to conduct a Pupil Accommodation Review, Board staff will provide written notice of the decision and include an invitation for a meeting to discuss and comment on the option(s) in the Initial Staff Report to the following, to be held before the Final Accommodation Review Public Meeting:
- i. Affected single and upper-tier municipalities through the Clerks' Departments (or equivalent); and
 - ii. Community partners.
- 4.2 The affected single and upper-tier municipalities, as well as other community partners that expressed an interest prior to the Pupil Accommodation Review, must provide their response (if any) on the recommended option(s) in the Initial Staff Report before the Final Pupil Accommodation Review Public Meeting.
- 4.3 Board staff will document their efforts to meet with the affected single and upper-tier municipalities, as well as the community partners, as described above.
- 4.4 The Board will provide advance notice of when the Final Pupil Accommodation Review Public Meeting is scheduled to take place.

5. Notice to Co-Terminous School Board(s) and the Ministry of Education

- 5.1 Within five (5) business days of the Board of Trustees' decision to conduct a Pupil Accommodation Review, Board staff will provide written notice of the decision to the following:
- The Directors of Education for the coterminous boards; and
 - The Ministry of Education, Office of the Assistant Deputy Minister of Financial Policy and Business Division, unless the Ministry of Education has informed the Board to direct such notice to a different office.

6. Pupil Accommodation Review Public Meetings

- 6.1 The Board will hold two (2) Pupil Accommodation Review Public Meetings to gather broader community feedback on the Initial Staff Report. The Board may, at its discretion, hold additional Pupil Accommodation Review Public Meetings. Board staff will facilitate the Pupil Accommodation Review Public Meetings.

- 6.2 For greater clarity, the Pupil Accommodation Review Public Meetings are not meetings of the Board of Trustees. In addition, PARC members may attend Pupil Accommodation Review Public Meetings, however, a Pupil Accommodation Review Public Meeting will continue if PARC members do not attend.
- 6.3 The Pupil Accommodation Review Public Meetings will be announced and advertised publicly by the Board through a range of media.
- i. First Pupil Accommodation Review Public Meeting
- 6.4 The First Pupil Accommodation Review Public Meeting will be held no fewer than thirty (30) business-days after the Board of Trustees' decision to conduct a Pupil Accommodation Review.
- 6.5 At a minimum, the First Pupil Accommodation Review Public Meeting must include the following:
- An overview of the PARC orientation session;
 - The Initial Staff Report with recommended option(s); and
 - A presentation of the SIPs.
- ii. Final Pupil Accommodation Review Public Meeting
- 6.6 The Final Pupil Accommodation Review Public Meeting will be held at least forty (40) business-days from the date of the First Pupil Accommodation Review Public Meeting.

7. Final Staff Report

- 7.1 Board staff will post the Final Staff Report on the Board's website no fewer than ten (10) business days from the Final Pupil Accommodation Review Public Meeting. The Final Staff Report will be also available to the public at the schools subject to the Pupil Accommodation Review. In addition, the Final Staff Report will be submitted to the Board of Trustees.
- 7.2 The Final Staff Report will include all information provided in the Initial Staff Report as well as the following:
- Modifications to proposed and preferred options, including proposed accommodation plans and implementation timelines, previously identified in the Initial Staff Report, if required;
 - PARC feedback;
 - Public feedback;
 - Information and feedback obtained from municipalities and other community partners; and
 - A summary of staff's efforts to meet with the affected single and upper-tier municipalities, as well as other community partners that expressed an interest prior to the Pupil Accommodation Review.

- 7.3 The Final Staff Report to the Board of Trustees will be available to the public a minimum of ten (10) business-days prior to a meeting of the Board of Trustees to receive public delegations.

8. Public Delegations to the Board of Trustees

- 8.1 Members of the public will be given the opportunity to provide feedback on the Final Staff Report through public delegations to the Board of Trustees at a meeting of the Board of Trustees no fewer than ten (10) business days from the posting of the Final Staff Report.
- 8.2 A meeting of the Board of Trustees to receive public delegations will be announced and advertised publicly by the Board through a range of media. Delegations will be received in accordance with the Board's policy on Public Delegations.

9. Final Staff Report with Public Delegations Addendum and Decision by the Board of Trustees

- 9.1 At the conclusion of the Pupil Accommodation Review process, and no fewer than ten (10) business days from the public delegations, Board staff will present the Final Staff Report with Public Delegation Addendum, including information from the public delegations and any staff response to such information, to the Board of Trustees.
- 9.2 The Board of Trustees has the discretion to approve the recommendation(s) of the Final Staff Report as presented, modify the recommendation(s) of the Final Staff Report, or to approve a different outcome.
- 9.3 The Board of Trustees will make a decision regarding the Pupil Accommodation Review.

10. Transition Planning

- 10.1. The transition of students will be carried out in consultation with parents/guardians and staff. Following the decision to consolidate and/or close a school, the Board will establish a separate committee to address the transition for students and staff that will work in consultation with parents/guardians and staff of affected schools.
- 10.2. A Terms of Reference will be established for the Transition Planning Committee.

MODIFIED PUPIL ACCOMMODATION REVIEW PROCESS

In the circumstances set out in Board Policy X-0000-00-0, the Board of Trustees may undertake a modified Pupil Accommodation Review process.

11. Initial Staff Report and SIPs

- 11.1 Board staff will prepare an Initial Staff Report. In addition to the components of the Initial Staff Report specified above, the Initial Staff Report will, based on the factors set out in Board Policy X-0000-00-0, identify relevant factors considered and provide the rationale used to recommend the modified process to the identified group of school(s).
- 11.2 Board staff will also prepare SIPs for each of the schools that may be subject to the modified Pupil Accommodation Review using the SIP template. Board staff will provide the Initial Staff Report and the SIPs to the Board of Trustees.
- 11.3 The decision to proceed with a modified Pupil Accommodation Review will be at the sole discretion of the Board of Trustees.

12. Pupil Accommodation Review Committee

- 12.1 The formation of a PARC is not required under the modified Pupil Accommodation Review process.

13. Notice and Consultation Requirements

- 13.1 Following the decision of the Board of Trustees to proceed with a modified Pupil Accommodation Review, the Initial Staff Report and SIPs will be made available to the public at the Board Office and will be posted on the Board's website.
- 13.2 Within five (5) business days of the decision of the Board of Trustees, Board staff will provide written notice of the decision and include an invitation for a meeting to discuss and comment on the option(s) in the Initial Staff Report to the following:
 - Affected single and upper-tier municipalities through the Clerks' Departments (or equivalent); and
 - Community partners.
- 13.3 Within five (5) business days of the decision of the Board of Trustees, Board staff will provide written notice of the decision to:
 - The Directors of Education for the co-terminous boards; and
 - The Ministry of Education through the office of the Assistant Deputy Minister of the Financial Policy and Business Division, unless the Ministry of Education has informed the Board to direct such notice to a different office.

- 13.4 Municipalities and community partners who were provided with notice must provide their responses, if any, before the Pupil Accommodation Review Public Meeting (or, if more than one Pupil Accommodation Review Public Meeting is convened, prior to the Final Pupil Accommodation Review Public Meeting).

14. Pupil Accommodation Review Public Meetings

- 14.1 Board staff will convene and facilitate a Pupil Accommodation Review Public Meeting no fewer than thirty (30) business days from the date on which the Board of Trustees decide to hold a modified Pupil Accommodation Review. Board staff, at their discretion, may convene more than one Pupil Accommodation Review Public Meeting.
- 14.2 For greater clarity, the Pupil Accommodation Review Public Meeting is not a meeting of the Board of Trustees.
- 14.3 A Pupil Accommodation Review Public Meeting will be announced and advertised through a range of media. Board staff will record feedback from the community at the Pupil Accommodation Review Public Meeting.

15. Final Staff Report

- 15.1 No fewer than ten (10) business days after the Pupil Accommodation Review Public Meeting, or, if more than one Pupil Accommodation Review Public Meeting is held, after the Final Pupil Accommodation Review Public Meeting, Board staff will submit the Final Staff Report to the Board of Trustees and will post the Final Staff Report on the Board's website, or will make it available upon request at the Board office.
- 15.2 The Final Staff Report will include all information provided in the Initial Staff Report as well as the following:
- Modifications to the proposed and preferred options, including the proposed accommodation plans and implementation timelines in the Initial Staff Report, if required;
 - Feedback from any public consultations;
 - Any relevant information obtained from municipalities and other community partners prior to and during the modified Pupil Accommodation Review.

16. Public Delegations

- 16.1 Members of the public will be given the opportunity to provide feedback on the Final Staff Report through public delegations to the Board of Trustees at a meeting of the Board of Trustees no fewer than ten (10) business days after the Final Staff Report is publicly posted.

- 16.2 A meeting of the Board of Trustees to receive public delegations will be announced and advertised publicly by the Board through a range of media. Delegations will be received in accordance with the Board's policy on public delegations.

17. Final Staff Report with Public Delegation Addendum and Decision by the Board of Trustees

- 17.1 Board staff will present the Final Staff Report with Public Delegation Addendum, which will include the compiled feedback from the public delegations to the Board of Trustees no fewer than ten (10) business days from the public delegations.
- 17.2 The final decision regarding the modified Pupil Accommodation Review shall be made by the Board of Trustees. The Board of Trustees has the discretion to approve the recommendations in the Final Staff Report as presented, modify the recommendations, or approve a different outcome.
- 17.3 A transition plan will be put in place following the Board of Trustees' decision to consolidate and/or close to a school.

18. EXEMPTIONS

- 18.1 The Board is not obligated to undertake a Pupil Accommodation Review in any of the following circumstances:
- Where a replacement school is to be built by the Board on the existing site, or built or acquired within the existing school attendance boundary, as identified by the Board, including in its relevant policies;
 - Where a replacement school is to be built by the Board on the existing site, or built or acquired within the existing school attendance boundary and the school community must be temporarily relocated to ensure the safety of students and staff during the reconstruction, as identified by the Board, including in its relevant policies;
 - When a lease for the school is terminated;
 - When the Board is planning the relocation (in any school year or over a number of school years) of grades or programs, in which the enrolment constitutes less than 50% of the school's enrolment (this calculation is based on the enrolment at the time of the relocation, or the first phase of a relocation carried over a number of school years);
 - When the Board is repairing or renovating a school, and the school community must be temporarily relocated to ensure the safety of students during the renovations;
 - Where a facility has been serving as a holding school for a school community whose permanent school is over-capacity and/or is under construction or repair; or
 - Where there are no students enrolled at the school at any time throughout the school year.
 - Board staff will ensure that school communities are informed about proposed accommodation plans for students before a decision is made by the Board of Trustees to consolidate, close or move a school or students in accordance with an exemption to the Pupil Accommodation Review process

- Board staff will prepare a report to the Board of Trustees setting out the circumstances supporting the exemption to the Pupil Accommodation Review process in respect of the school or schools under consideration for such exemption.

18.2 Board staff will, no fewer than five (5) business days after the Board of Trustees make a decision that such exemption applies, provide written notice to the following:

- Each of the affected single and upper-tier municipalities through the Clerks' Departments
- (or equivalent);
- Other community partners that expressed an interest prior to the exemption (as defined above);
- The coterminous school boards in the areas of the affected school(s) through the Director of Education; and
- The Ministry of Education through the Assistant Deputy Minister of the Financial Policy and Business Division, unless the Ministry of Education has informed the Board to direct such notice to a different office.

18.3 Board staff will put a transition plan in place following the Board of Trustees' decision to consolidate, close or move a school or students pursuant to an exemption to the Pupil Accommodation Review process.

Schedules

Schedule A-School Information Profile

Schedule B-Template Terms of Reference for the Pupil Accommodation Review Committee

Schedule C-Pupil Accommodation Review Timeline and Checklist (Regular)

Schedule D-Pupil Accommodation Review Timeline and Checklist (Modified)

Appendices

Appendix 1: MEMORANDUM 2015:B09: Release of New Pupil Accommodation Review Guideline and Community Planning and Partnership Guideline

Appendix 2: Ministry of Education Pupil Accommodation Review Guideline, March 2015

Appendix 3: Ministry of Education Administrative Review of Pupil Accommodation Review Process

Appendix 4: Ministry of Education Community Planning and Partnership Guideline, March 2015

Approved: Month Day, 2016

SCHEDULE A

School Information Profile

1. The School Information Profile (“SIP”) is an orientation document prepared by Board staff that contains point-in-time data for each school that is under a pupil accommodation review.
2. An accommodation review is a process undertaken by the Board to determine the future of a school or a group of schools.
3. The purpose of the SIP is to help the Pupil Accommodation Review Committee (the “PARC”) and members of the public understand the context surrounding the decision to include the school in a pupil accommodation review process and to allow easier comparison between each school in a pupil accommodation review process.
4. A PARC is a committee established by the Board that represents the affected school(s) of a pupil accommodation review and that acts as the official conduit for information shared between the Board and the affected school communities.
5. This SIP is established pursuant to and in compliance with the Ministry of Education’s *Pupil Accommodation Review Guideline* (March 2015), Board Policy X-0000-00-0, and the related Board Procedure.
6. Each SIP includes data about each of the school(s) under review, and includes considering the value to the student and the value to the school board.

The following are the minimum data requirements and factors that make up a SIP:

Facility Profile:

- School name and address.
- Site plan and floor plan(s) (or space template) of the school with the date of school construction and any subsequent additions.
- School attendance area (boundary) map.
- Context map (or air photo) of the school indicating the existing land uses surrounding the school.
- Planning map of the school with zoning, Official Plan or secondary plan land use designations.
- Size of the school site (acres or hectares).
- Building area (square feet or square metres).
- Number of portable classrooms.
- Number and type of instructional rooms as well as specialized classroom teaching spaces (e.g., science lab, tech shop, gymnasium, etc.).

- Area of hard surfaced outdoor play area and/or green space, the number of play fields, and the presence of outdoor facilities (e.g., tracks, courts for basketball, tennis, etc.).
- Ten-year history of major facility improvements (item and cost).
- Projected five-year facility renewal needs of school (item and cost).
- Current Facility Condition Index (FCI) with a definition of what the index represents.
- A measure of proximity of the students to their existing school, and the average distance to the school for students.
- Percentage of students that are and are not eligible for transportation under the school board policy, and the length of bus ride to the school (longest, shortest, and average length of bus ride times).
- School utility costs (totals, per square foot, and per student).
- Number of parking spaces on site at the school, an assessment of the adequacy of parking, and bus/car access and egress.
- Measures that the school board has identified and/or addressed for accessibility of the school for students, staff, and the public with disabilities (i.e., barrier-free).
- On-the-ground (OTG) capacity, and surplus/shortage of pupil places.

Instructional Profile:

- Describe the number and type of teaching staff, non-teaching staff, support staff, itinerant staff, and administrative staff at the school.
- Describe the course and program offerings at the school.
- Describe the specialized service offerings at the school (e.g., cooperative placements, guidance counseling, etc.).
- Current grade configuration of the school (e.g., junior kindergarten to Grade 6, junior kindergarten to Grade 12, etc.).
- Current grade organization of the school (e.g., number of combined grades, etc.).
- Number of out of area students.
- Utilization factor/classroom usage.
- Summary of five previous years' enrolment and 10-year enrolment projection by grade and program.
- Current extracurricular activities.

Other School Use Profile:

- Current non-school programs or services resident at or co-located with the school as well as any revenue from these non-school programs or services and whether or not it is at full cost recovery.
- Current facility partnerships as well as any revenue from the facility partnerships and whether or not it is at full cost recovery.
- Community use of the school as well as any revenue from the community use of the school and whether or not it is at full cost recovery.
- Availability of before and after school programs or services (e.g., child care) as well as any revenue from the before and after school programs and whether or not it is at full cost recovery.

- Lease terms at the school as well as any revenue from the lease and whether or not it is at full cost recovery.
- Description of the school's suitability for facility partnerships.

Additional items may be added to the SIP to reflect local circumstances and priorities to further understand the school(s) under review.

DRAFT

SCHEDULE B

Template Terms of Reference of the Pupil Accommodation Review Committee

Background

The Board is responsible for fostering student achievement and well-being and ensuring effective stewardship of the Board's resources. In this regard, the Board is responsible for deciding the most appropriate pupil accommodation arrangements for the delivery of elementary and secondary programs. The Board may from time to time be required to consider school consolidations and school closures by undertaking an accommodation review process that is consistent with the Board's Pupil Accommodation Review Policy and Procedure. These are the terms of reference applicable to the Pupil Accommodation Review Committee ("PARC") established for the [identify accommodation review].

Mandate

1. The PARC is an advisory committee established by the Board that represents the school(s) affected by a pupil accommodation review and which acts as the official conduit for information shared between the Board and the affected communities.
2. The PARC provides feedback with respect to Staff Report(s) and the options set out therein and may also present alternative accommodation option(s), including rationale for the option(s), recognizing the principles outlined in the Background section. The overall goal of the PARC is to provide the local perspective of stakeholders impacted by the decision of the Board of Trustees, and to provide constructive feedback to the Director of Education regarding the Initial Staff Report, SIP, options, and preferred option.
3. The final decision regarding the future of a school or a group of schools rests solely with the Board of Trustees.
4. This PARC is formed with respect to the following school(s):

[Insert List of Schools]

Membership of the PARC

5. The members of the PARC will be comprised of:
 - at least one parent / guardian representative from each school under review and one alternate parent/guardian, chosen by the school community; and
 - such other persons as appointed by the Director of the Board.

A Trustee(s) may participate on the Committee as ad hoc member(s).

6. Resources to the PARC shall be comprised of Board staff from various areas of responsibility, such as School Superintendents, School Principal(s), Finance, Plant and Planning, Transportation staff members, may be assigned to act as resources to the PARC.

Roles and Responsibilities of the PARC

7. The Chair of the PARC, appointed by the Director of Education, will facilitate the PARC process and will ensure it is consistent with the Board's Policy and Procedure.
8. PARC members are expected to attend working meetings and participate in the process.
 - 8.1 PARC members are expected to attend an orientation session. At the orientation session, PARC members will learn about the mandate, roles and responsibilities and procedures of the PARC

Roles and Responsibilities of Resources to the PARC

9. Board Staff from various areas of responsibility will assist as required with answering questions, providing clarification and will document and compile feedback for inclusion in Staff Reports.
10. The PARC will be provided with copies of the Initial Staff Report and School Information Profiles for each school under review.
 - 10.1. The PARC will review the School Information Profile ("SIP") for each school under review.
 - 10.1.1. A SIP is an orientation document with point-in-time data for each of the schools under a pupil accommodation review. The SIP is intended to help the PARC and the community understand the context surrounding the decision to include the specific school(s) in a pupil accommodation review.
 - 10.1.2. The PARC may request clarification with respect to information provided in the SIP.
 - 10.1.3. It is not the role of the PARC to approve the SIP.
 - 10.2. The PARC will review the information provided and accommodation options proposed in the Initial Staff Report and will seek clarification, ask questions and provide feedback as necessary.
 - 10.2.1. The PARC will provide feedback with respect to the options in the Initial Staff Report prior to the first Accommodation Review Public Meeting. The PARC may request clarification with respect to information provided in the Initial Staff Report. The PARC may provide alternative option(s) to those set out in the Initial Staff Report. The PARC must provide supporting rationale for the alternative option(s).
 - 10.2.2. The Initial Staff Report is drafted by Board staff. It identifies accommodation issues, sets out one or more options to address accommodation issues, identifies a recommended option if more than one is proposed, and includes proposed timelines for implementation.

11. PARC members are not required to reach consensus with respect to the comments and feedback that will be provided to the Board of Trustees.
12. The comments, feedback, and any alternative option(s) will be collected and compiled by Board staff in the form of meeting notes. This information will be included in the Community Consultation Section of the Final Staff Reports presented to the Board of Trustees.

Meetings of the PARC

13. The PARC will hold at least three (3) working meetings (not including the orientation meeting) to discuss the pupil accommodation review. The PARC may choose to hold additional working meetings as deemed necessary within the timelines established by the Pupil Accommodation Review Policy and Procedure, at the discretion of the PARC Chair. The PARC will review the materials presented to it by School Board staff at the working meetings. PARC working meetings will be open to the public, however, the public may not participate in such meetings.
14. PARC working meetings will be deemed to be properly constituted even if all members are not in attendance. There is no quorum required for a PARC working meeting.
15. The PARC will be deemed to be properly constituted even if one or more members resign or do not attend working meetings of the PARC.
16. Meeting notes of PARC working meetings will be prepared.
17. PARC members may attend the Accommodation Review Public Meetings, held by Board staff.
18. PARC working meeting dates will be established by the Chair in consultation with the PARC.

[Insert Public Meeting Dates]

SCHEDULE C

Pupil Accommodation Review Timeline

**Note that the timeline is measured in business days from the date of the Trustees' decision to start the Process of a Pupil Accommodation Review ("PAR").*

| Item | Additional Information | Timeline |
|---|---|--|
| Initial Staff Review and SIPs presented to Trustees | PAR approved | 0 |
| Written notice to municipality through Clerks' Departments (or equivalent) and to community partners who expressed an interest prior to the PAR | Include invitation to meeting to discuss and comment on options in Initial Staff Report | Within 5 business days of PAR approval |
| Written notice to Director of Education of co-terminous school boards | | Within 5 business days of PAR approval |
| Written notice to Ministry of Education | Send to the office of the Assistant Deputy Minister of the Financial Policy and Business Decision | Within 5 business days of PAR approval |
| Form PARC | Boards may opt to do this within 5 business days of the PAR being approved. The PARC should be formed in time to permit the PARC orientation session to occur in advance of the First Public Meeting. | |
| Arrange meeting with municipalities and with community partner(s) | Log attempts to meet | Before First Public Meeting |
| Announce and advertise First Public Meeting through range of media | | |
| First Public Meeting | | At least 30 business days after PAR approval |
| Provide notice to municipalities and community partners of Final Public Meeting | | |
| Announce and advertise Final Public Meeting through range of media | | |
| Receive response from municipalities and community partners | | Before First Public Meeting |
| Final Public Meeting | | At least 40 business days after First Public Meeting |

| Item | Additional Information | Timeline |
|---|--|--|
| Final Staff Report to the Trustees | Must be available and accessible to the public | At least 10 business days after Final Public Meeting |
| Provide notice of date of public delegations | | After Final Staff Report is available to the public, and at least 10 business days before the public delegations |
| Public delegations to Trustees | | |
| Compile feedback from public delegations | | |
| Present Final Staff Report with Public Delegations Addendum to Trustees | | |
| Trustees to make final decision | Not to occur in the summer | At least 10 business days after public delegations |
| Constitute committee to address staff and student transitions | | |

SCHEDULE D

Modified Pupil Accommodation Review Timeline

**Note that the timeline is measured in business days from the date of the Trustees' decision to start the Process of a Modified Pupil Accommodation Review ("MPAR").*

| Item | Additional Information | Timeline |
|--|---|---|
| Initial Staff Report and SIPs presented to Trustees | MPAR approved | 0 |
| Initial Staff Report and SIPs to be posted on the School Board's website and made publicly available | | |
| Written notice to municipality through Clerks' Departments (or equivalent) and to community partners who expressed an interest prior to the MPAR | Include invitation to meeting to discuss and comment on options in Initial Staff Report | Within 5 business days of MPAR approval |
| Written notice to Director of Education of co-terminous school boards | | Within 5 business days of MPAR approval |
| Written notice to Ministry of Education | Send to the office of the Assistant Deputy Minister of the Financial Policy and Business Decision | Within 5 business days of MPAR approval |
| Announce and advertise Public Meeting through range of media | | |
| Arrange meeting with municipalities and with community partner(s) | Log attempts to meet | Before Public Meeting |
| Receive response from municipalities and community partner(s), if any | | Before Public Meeting |
| Public Meeting | | At least 30 business days after MPAR approval |
| Final Staff Report to the Trustees | Must be available and accessible to the public | At least 10 business days after Public Meeting (or final Public Meeting if more than one is held) |
| Provide notice of date of public delegations | | After Final Staff Report has been made available to the public, and at least 10 business days before the public delegations |

| Item | Additional Information | Timeline |
|---|----------------------------|--|
| Public delegation to the Trustees | | |
| Compile feedback from public delegations | | |
| Present Final Staff Report with Public Delegations Addendum to Trustees | | |
| Trustees to make final decision | Not to occur in the summer | At least 10 business days after the public delegations |
| Put transition plan in place | | |

Time is measured in business days from the date the PAR is approved. "Business day" is defined as a calendar day that is not a weekend or statutory holiday. It also does not include calendar days that fall within school boards' Christmas, spring, and summer break. For schools with a year-round calendar, any break that is five calendar days or longer is not a business day.

Ministry of Education

Office of the Assistant Deputy Minister

Financial Policy and
Business Division
20th Floor, Mowat Block
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Toronto ON M7A 1L2**Ministère de l'Éducation**

Bureau du sous-ministre adjoint

Division des politiques financières et
des opérations
20e étage, édifice Mowat
Queen's Park
Toronto ON M7A 1L2**2015: B09**

Memorandum To: Directors of Education

From: Gabriel F. Sékaly
Assistant Deputy Minister
Financial Policy and Business Division

Date: March 26, 2015

Subject: **Release of New Pupil Accommodation Review
Guideline and Community Planning and Partnerships
Guideline**

I am writing to advise you of the release of the new Pupil Accommodation Review Guideline (PARG) (see Appendix A) as well as the revised Facility Partnerships Guideline (now known as the Community Planning and Partnerships Guideline (CPPG)) (see Appendix B), and to provide you with details of the changes to these guidelines.

In 2014-15, the Ministry of Education introduced the School Board Efficiencies and Modernization (SBEM) strategy to provide incentives and supports for school boards to make more efficient use of school space. One of the elements of the strategy was to revise the PARG to allow school boards to have a more effective tool to address their needs to close and consolidate facilities, while continuing to ensure that communities have the opportunity to provide meaningful input.

The Ministry of Education is also revising the Community Planning and Partnerships Guideline to align and more closely link with the new PARG. Changes have been made to both guidelines to enhance opportunities for school boards to work more closely with local municipal governments and other community partners when planning to address their underutilized school space, and more generally to require greater coordination and sharing of planning related information between school boards and other community partners.

The PARG and CPPG continue to represent a framework of **minimum** standards for school boards to meet in developing their pupil accommodation review and facility partnerships policies. **School boards are expected to amend their existing pupil accommodation review and facility partnerships policies to reflect the changes incorporated into the new PARG and CPPG before announcing any new pupil**

accommodation reviews. The Ministry of Education expects school boards to consult with local communities prior to adopting or subsequently amending these policies.

The new PARG and CPPG are effective upon release and replace the previous versions dated June 26, 2009 and February 11, 2010, respectively.

A. New Pupil Accommodation Review Guideline (PARG)

Since the PARG was last updated in 2009, the Ministry of Education and school boards have received a significant amount of feedback about the effectiveness of the existing PARG for school boards, parents and guardians, and other community members. Among the feedback received about the existing PARG were concerns about the contentiousness of the existing process for members of the accommodation review committee (ARC), the inflexibility of the existing process with its “one size fits all” approach to all accommodation reviews, the length of the existing process, the lack of a formal role for municipal representatives, and the fact that trustees do not always make decisions that reflect the reports of the ARC.

To address many of the concerns noted above, the Ministry of Education’s Capital Advisory Committee (CAC), consisting of 15 school board representatives from across the province, undertook a comprehensive review of the existing PARG. This review, which began in early 2014, was also intended to ensure that school boards have an effective tool to support the SBEM strategy of addressing underutilized space. The CAC then provided recommendations on potential PARG revisions to the Ministry of Education for further consideration.

In late 2014 and early 2015, the Ministry of Education consulted on the CAC’s recommendations with stakeholders, including trustee associations, senior school board officials, parent groups, student associations, teacher federations, education worker unions, municipal sector representatives, and administrative review facilitators.

The Ministry of Education has incorporated the CAC’s recommendations and the feedback from the consultations into the new PARG. As a result, the PARG has undergone a significant transformation. School boards should ensure that they review the new PARG carefully before examining how to amend their local pupil accommodation review policies.

B. Highlights of the New PARG

1. Requirements for School Boards to Consult with Municipal Governments and Other Community Partners on Underutilized Space:

The PARG includes a requirement for school boards to seek feedback from their local municipal governments and other community partners on capital and accommodation planning related to addressing underutilized space. The PARG outlines consultation with local municipal governments and other community partners after the pupil accommodation review process has commenced. (Note that

the CPPG includes requirements for school boards to reach out to municipalities and other community partners on an annual basis as part of the regular planning cycle, and when school boards are beginning to review underutilized space in schools in specific areas of the school board.)

2. Changes to the Accommodation Review Committee Structure:

a) Role:

The role of the ARC has been refocused as a conduit for information sharing between the school board and the school communities. At a minimum, the ARC will provide feedback on the initial staff report option(s). The ARC may provide other options, however, it must include a supporting rationale for any such option. ARC members do not need to have a unanimous opinion regarding the information provided to the Board of Trustees.

b) Membership:

The ARC membership, at a minimum, should include parent/guardian representatives from the school(s) under review. Where established by a school board's pupil accommodation review policy, there may also be the option to include students and representation from the broader community. In addition, school board trustees may serve as ad hoc ARC members.

3. Changes to Timelines for the Accommodation Review Process:

a) Standard Accommodation Review Process:

The standard pupil accommodation review process requires school boards to hold a minimum of two public meetings over a minimum five month period. The new PARG lists minimum requirements for the first public meeting.

b) Optional Modified Accommodation Review Process:

The optional modified pupil accommodation review process requires school boards to hold a minimum of one public meeting over a minimum three month period. As with the standard process, the new PARG lists minimum requirements for the first public meeting.

4. Changes to School Board Staff Reporting Requirements:

Initial and final staff reports, respectively, must be presented by school board staff to the Board of Trustees prior to, and immediately after, a pupil accommodation review.

a) Initial Staff Report to Board of Trustees:

An initial staff report must be presented before a pupil accommodation review can be undertaken. The initial staff report must contain one or more options, including a recommended option, with supporting rationale for each option. Furthermore, the initial staff report must also include information on actions taken by school board staff prior to establishing a pupil accommodation review process.

b) Final Staff Report to Board of Trustees:

The final staff report must contain a Community Consultation section that contains feedback from the ARC and any public consultations as well as any relevant information obtained from municipalities and other community partners prior to and during the pupil accommodation review.

5. Introduction of Transition Plan Requirement:

Following the decision to consolidate and/or close a school, a transition plan should be developed in consultation with parents/guardians and staff.

6. Introduction of Optional Modified Accommodation Review Process:

An optional modified pupil accommodation review process has been introduced in the new PARG for school boards to address local circumstances. For a school board to adopt a modified pupil accommodation review process as part of its pupil accommodation review policy, the school board must identify explicitly the factors that need to be met before a modified process can be initiated. The new PARG lists the factors for school boards to consider in their pupil accommodation review policies for a modified process. At least two of these factors must be incorporated as part of the conditions that must be met before a school board can initiate a modified pupil accommodation review process. School boards can also include factors beyond those listed in the new PARG.

A school board must consult with its community on the factors that could trigger a modified pupil accommodation review process before these factors are adopted as part of the school board's pupil accommodation review policy. **A school board may still choose to use the standard pupil accommodation review process even if the conditions for the use of a modified process, based on the school board's pupil accommodation review policy, are satisfied.**

The optional modified pupil accommodation review process requires a minimum of one public meeting, and does not include the need to form an ARC.

7. Introduction of Additional Exemptions:

Two new exemptions have been added to the new PARG for specific circumstances where school boards are not obligated to undertake a pupil accommodation review.

- a) Where a replacement school is to be built by the school board on the existing site, or built or acquired within the existing school attendance boundary and the school community must be temporarily relocated to ensure the safety of students and staff during the reconstruction, as identified through the school board's policy.
- b) Where there are no students enrolled at the school at any time throughout the school year.

8. Other Changes:

a) School Information Profiles (SIPs):

The SIP minimum data requirements and factors have been refocused to the measureable data within the school boards' areas of expertise.

As school boards integrate the changes to the new PARG into their pupil accommodation review policies, it is important to note that the Ministry encourages school boards not to make final pupil accommodation review decisions during the summer holiday period.

C. Revised Community Planning and Partnerships Guideline (CPPG) (formerly the Facility Partnerships Guideline)

As a result of the consultation feedback on the new PARG, the Ministry of Education is building in a more formal consultation between school boards and municipal governments and other community partners in the planning process around underutilized school space, as well as green space/parkland. These changes are being made to help ensure that municipalities and other community partners are made more aware of a school board's plans and available school space on a regular basis, and well before a school is considered for inclusion in a pupil accommodation review.

The Ministry of Education's 2014 mandate letter acknowledged that it will be engaging stakeholders in the near future on community hubs, in cooperation with other ministries in this area, to promote efficient use of public assets, build better ties between schools and municipalities and other community organizations, and ensure more viable schools are able to remain open. As a result, further revisions to the CPPG may be introduced as the government reviews its policies towards supporting community hubs.

D. Highlights of the CPPG Revisions

- 1) The Facility Partnerships Guideline has been re-named the Community Planning and Partnerships Guideline (CPPG) to reflect that in addition to encouraging facility partnerships, the guideline also supports effective planning with community partners, including land use and green space/park planning.
- 2) At a minimum, all levels of municipal government, District Social Services Administration Boards (DSSABs), Consolidated Municipal Service Managers (CMSMs), public health boards, Local Health Integration Networks (LHINs), and children's mental health centres must be on school boards' notification list when key information regarding facility partnerships or planning is changed or updated.
- 3) At a minimum, on an annual basis, the sharing of planning information between school boards and other community partners must take place at a public meeting.

- a) In addition to this meeting, school boards and other community partners have the option to meet at a staff-level to discuss potential partnership and planning opportunities.
 - b) The type of information to be shared at this meeting by both school boards and community partners, and the documentation of exchanged information by school boards has been specified.
- 4) In addition to the annual meeting, school boards should continue discussions with affected municipalities and other community organizations as they explore options to address underutilized space issues in schools within specific areas of their school board. These discussions will inform proposals that school board staff may present to the Board of Trustees, including recommendations to undertake a pupil accommodation review process.

As part of these discussions with community organizations, school boards should obtain a clear indication of any community planning and partnership opportunities in areas where a pupil accommodation review may take place. Additionally, school boards are to request technical information from the local municipality or municipalities where a planned pupil accommodation review may occur. This technical information is to be specified by the school board and can include, but is not limited to, population and future development projections in the area.

The *Pupil Accommodation Review Guideline* provides a full description of the pupil accommodation review process that school boards are required to undertake prior to making a pupil accommodation review decision.

E. Transition

The Ministry of Education recognizes that some school boards may have begun pupil accommodation reviews (i.e., consultation process is substantially underway or completed) or facility partnerships talks prior to the release of the new PARG and CPPG. Pupil accommodation reviews and facility partnerships that are currently announced or underway should proceed based on the school board's existing policies. Furthermore, school boards should not review previous ARC processes or decisions based on the new PARG.

School boards are expected to amend their existing pupil accommodation review and facility partnerships policies to reflect the changes incorporated into the new PARG and CPPG before announcing any new pupil accommodation reviews.

Training and support materials for school boards are anticipated to be developed to assist with them with the implementation of the new PARG and CPPG. Details regarding these materials will be announced later this year.

F. Ministry Contacts

The Ministry of Education wishes to thank the members of the CAC for their

contributions towards the development of the new PARG. The Ministry of Education will continue to work with school boards regarding the best use of space in schools.

If you have any questions regarding the new PARG and the CPPG, please contact Grant Osborn at 416-325-1705 or Grant.Osborn@ontario.ca, or Mathew Thomas at 416-326-9920 or Mathew.P.Thomas@ontario.ca.

Original signed by

Gabriel F. Sékaly
Assistant Deputy Minister
Financial Policy and Business Division

Attachments: Appendix A: Pupil Accommodation Review Guideline, March 2015
Appendix B: Community Planning and Partnerships Guideline, March 2015

Copy: Superintendents of Business
Superintendents of Planning



MINISTRY OF EDUCATION
PUPIL ACCOMMODATION REVIEW GUIDELINE

March 2015

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PREAMBLE

School boards are responsible for managing their school capital assets in an effective manner. They must respond to changing demographics and program needs while ensuring continued student achievement and well-being, and the financial viability/sustainability of the school board.

One aspect of a school board's capital and accommodation planning is reviewing schools that have underutilized space. These are schools where the student capacity of the school is greater than the number of students enrolled. When a school board identifies a school that is projected to have long-term excess space, a school board would typically look at a number of options such as:

- moving attendance boundaries and programs to balance enrolment between over and underutilized schools;
- offering to lease underutilized space within a school to a coterminous school board;
- finding community partners who can pay the full cost of operating the underutilized space; and/or
- decommissioning or demolishing a section of the school that is not required for student use to reduce operating costs.

If none of these options are deemed viable by a school board, the board may determine that a pupil accommodation review process take place which could lead to possible school consolidations and closures. These decisions are made within the context of supporting the school board's student achievement and well-being strategy and to make the most effective use of its school buildings and funding.

The Ministry of Education expects school boards to work with their community partners when undertaking capital planning, including when a school board is beginning to develop options to address underutilized space in schools. The Ministry of Education's *Community Planning and Partnerships Guideline* (CPPG) outlines requirements for school boards to reach out to their local municipalities and other community partners to share planning related information and to explore potential partnership opportunities. This version of the *Pupil Accommodation Review Guideline* (the "*Guideline*") builds upon the CPPG by providing requirements for school boards to share information with and seek feedback from their local municipalities and other community partners related to any pupil accommodation reviews a school board initiates.

If a pupil accommodation review results in a school closure decision, a school board will then need to decide whether to declare that school as surplus, potentially leading to the future sale of the property. These sales are governed by provincial regulation. Alternately, a school board may decide to use a closed school for other school board purposes, or hold the property as a strategic long-term asset of the school board due to a projected need for the facility in the

future. Each school board decides when it is appropriate to review its strategic property holdings to determine if these properties are still required to be held or should be considered surplus to the school board's needs and considered for a future sale.

This document provides direction to school boards on one component of their capital planning - the pupil accommodation review process. It provides the minimum standards the province requires school boards to follow when undertaking a pupil accommodation review. It is important to note that school boards have flexibility to modify their pupil accommodation review policies to meet their local needs, and can develop policies that exceed the provincial minimum standards outlined in this document.

I. PURPOSE

The purpose of the *Guideline* is to provide a framework of minimum standards for school boards to undertake pupil accommodation reviews to determine the future of a school or group of schools. This *Guideline* ensures that where a decision is taken by a school board regarding the future of a school, that decision is made with the involvement of an informed local community and is based on a broad range of criteria regarding the quality of the learning experience for students.

This *Guideline* is effective upon release and replaces the previous *Guideline* of June 2009.

II. INTRODUCTION

Ontario's school boards are responsible for deciding the most appropriate pupil accommodation arrangements for the delivery of their elementary and secondary programs. These decisions are made by school board trustees in the context of carrying out their primary responsibilities of fostering student achievement and well-being, and ensuring effective stewardship of school board resources. In some cases, to address changing student populations, this requires school boards to consider undertaking pupil accommodation reviews that may lead to school consolidations and closures.

Under paragraph 26, subsection 8 (1) of the *Education Act*, the Minister of Education may issue guidelines with respect to school boards' school closure policies.

III. GUIDING PRINCIPLES

The *Guideline* has been established to align with the Ministry of Education's vision and as such, focuses on student well-being; academic achievement; and school board financial viability/sustainability.

All school board pupil accommodation review policies should be designed to align with these guiding principles.

IV. SCHOOL BOARD ACCOMMODATION REVIEW POLICIES

School boards are responsible for creating and implementing a policy to address pupil accommodation reviews to serve their local needs. The Ministry of Education expects school boards to consult with local communities prior to adopting or subsequently amending their pupil accommodation review policies.

All pupil accommodation review policies must be clear in stipulating that the final decision regarding the future of a school or group of schools rests solely with the Board of Trustees. If the Board of Trustees votes to close a school or schools in accordance with their policy, the school board must provide clear timelines regarding the closure(s) and ensure that a transition plan is communicated to all affected school communities within the school board.

It is important to note that this *Guideline* is intended as a **minimum** requirement for school boards in developing their policies. School boards are responsible for establishing and complying with their pupil accommodation review policies to serve their local needs.

A copy of the school board's pupil accommodation review policy, the government's *Pupil Accommodation Review Guideline* and the *Administrative Review of Accommodation Review Process* documents are to be made available to the public as determined in the school board's policy, and posted on the school board's website.

The *Guideline* recognizes that pupil accommodation reviews include a school or group of schools to facilitate the development of viable solutions for pupil accommodation that support the guiding principles.

School board pupil accommodation review policies will include statements that encourage the sharing of relevant information as well as providing the opportunity for the public and affected school communities to be heard.

The Ministry of Education recommends that, wherever possible, schools should only be subject to a pupil accommodation review once in a five-year period, unless there are circumstances determined by the school board, such as a significant change in enrolment.

V. SCHOOL BOARD PLANNING PRIOR TO AN ACCOMMODATION REVIEW

As described in the *Community Planning and Partnerships Guideline*, school boards must undertake long-term capital and accommodation planning, informed

by any relevant information obtained from local municipal governments and other community partners, which takes into consideration long-term enrolment projections and planning opportunities for the effective use of excess space in all area schools.

School boards must document their efforts to obtain information from local municipal governments as well as other community partners that expressed an interest prior to the pupil accommodation review; and provide any relevant information from municipalities and other community partners as part of the initial staff report (see Section VI).

VI. ESTABLISHING AN ACCOMMODATION REVIEW

School boards may proceed to establish a pupil accommodation review only after undertaking the necessary assessment of long-term capital and accommodation planning options for the school(s).

Initial Staff Report

Prior to establishing a pupil accommodation review, the initial staff report to the Board of Trustees must contain one or more options to address the accommodation issue(s). Each option must have a supporting rationale. There must be a recommended option if more than one option is presented. The initial staff report must also include information on actions taken by school board staff prior to establishing a pupil accommodation review process and supporting rationale as to any actions taken or not taken.

The option(s) included in the initial staff report must address the following:

- summary of accommodation issue(s) for the school(s) under review;
- where students would be accommodated;
- if proposed changes to existing facility or facilities are required as a result of the pupil accommodation review;
- identify any program changes as a result of the proposed option;
- how student transportation would be affected if changes take place;
- if new capital investment is required as a result of the pupil accommodation review, how the school board intends to fund this, as well as a proposal on how students would be accommodated if funding does not become available; and
- any relevant information obtained from municipalities and other community partners prior to the commencement of the pupil accommodation review, including any confirmed interest in using the underutilized space.

Each recommended option must also include a timeline for implementation.

The initial staff report and School Information Profiles (SIPs) (see Section VIII) will be made available to the public, as determined in the school board's policy,

and posted on the school board's website following the decision to proceed with a pupil accommodation review by the Board of Trustees.

School boards must ensure that individuals from the school(s) under review and the broader community are invited to participate in the pupil accommodation review consultation. At a minimum, the pupil accommodation review process must consist of the following methods of consultation:

- Accommodation Review Committee (ARC) (see Section VII);
- consultation with municipal governments local to the affected school(s) (see Section IX);
- public meetings (see Section X); and
- public delegations (see Section XI).

VII. THE ACCOMMODATION REVIEW COMMITTEE

Role

School boards must establish an ARC that represents the school(s) under review and acts as the official conduit for information shared between the school board and the school communities. The ARC may comment on the initial staff report and may, throughout the pupil accommodation review process, seek clarification of the initial staff report. The ARC may provide other accommodation options than those in the initial staff report; however, it must include supporting rationale for any such option.

The ARC members do not need to achieve consensus regarding the information provided to the Board of Trustees.

The school board's staff resources assigned to the ARC are required to compile feedback from the ARC as well as the broader community in the Community Consultation section of the final staff report (see Section XI) to be presented to the Board of Trustees.

Membership

The membership of the ARC should include, at a minimum, parent/guardian representatives from each of the schools under review, chosen by their respective school communities.

Where established by a school board's pupil accommodation review policy, there may also be the option to include students and representation from the broader community. For example, a school board's policy may include a requirement for specific representation from the First Nations, Metis, and Inuit communities. In addition, school board trustees may be ad hoc ARC members to monitor the ARC progress.

Formation

The ARC should be formed following the Board of Trustees' consideration of the initial staff report but prior to the first public meeting. The school board will invite ARC members from the school(s) under review to an orientation session that will describe the mandate, roles and responsibilities, and procedures of the ARC.

Terms of Reference

School boards will provide the ARC with Terms of Reference that describe the ARC's mandate. The mandate will refer to the school board's education and accommodation objectives in undertaking the ARC and reflect the school board's strategy for supporting student achievement and well-being.

The Terms of Reference will also clearly outline the school board's expectations of the roles and responsibilities of the ARC; and describe the procedures of the ARC. At a minimum, the ARC will provide feedback on the initial staff report option(s).

The Terms of Reference will outline the minimum number of working meetings of the ARC.

Meetings of the Accommodation Review Committee

The ARC will meet to review materials presented by school board staff. It is recommended that the ARC hold as many working meetings as is deemed necessary within the timelines established in their school board's pupil accommodation review policy.

VIII. SCHOOL INFORMATION PROFILE

School board staff are required to develop School Information Profiles (SIPs) as orientation documents to help the ARC and the community understand the context surrounding the decision to include the specific school(s) in a pupil accommodation review. The SIP provides an understanding of and familiarity with the facilities under review.

The SIP is expected to include data for each of the following two considerations about the school(s) under review:

- value to the student; and
- value to the school board.

A SIP will be completed by school board staff for each of the schools under review. The following are the minimum data requirements and factors that are to be included in the SIP:

- Facility Profile:
 - School name and address.
 - Site plan and floor plan(s) (or space template) of the school with the date of school construction and any subsequent additions.
 - School attendance area (boundary) map.
 - Context map (or air photo) of the school indicating the existing land uses surrounding the school.
 - Planning map of the school with zoning, Official Plan or secondary plan land use designations.
 - Size of the school site (acres or hectares).
 - Building area (square feet or square metres).
 - Number of portable classrooms.
 - Number and type of instructional rooms as well as specialized classroom teaching spaces (e.g., science lab, tech shop, gymnasium, etc.).
 - Area of hard surfaced outdoor play area and/or green space, the number of play fields, and the presence of outdoor facilities (e.g., tracks, courts for basketball, tennis, etc.).
 - Ten-year history of major facility improvements (item and cost).
 - Projected five-year facility renewal needs of school (item and cost).
 - Current Facility Condition Index (FCI) with a definition of what the index represents.
 - A measure of proximity of the students to their existing school, and the average distance to the school for students.
 - Percentage of students that are and are not eligible for transportation under the school board policy, and the length of bus ride to the school (longest, shortest, and average length of bus ride times).
 - School utility costs (totals, per square foot, and per student).
 - Number of parking spaces on site at the school, an assessment of the adequacy of parking, and bus/car access and egress.
 - Measures that the school board has identified and/or addressed for accessibility of the school for students, staff, and the public with disabilities (i.e., barrier-free).
 - On-the-ground (OTG) capacity, and surplus/shortage of pupil places.

- Instructional Profile:
 - Describe the number and type of teaching staff, non-teaching staff, support staff, itinerant staff, and administrative staff at the school.
 - Describe the course and program offerings at the school.
 - Describe the specialized service offerings at the school (e.g., cooperative placements, guidance counseling, etc.).
 - Current grade configuration of the school (e.g., junior kindergarten to Grade 6, junior kindergarten to Grade 12, etc.).
 - Current grade organization of the school (e.g., number of combined grades, etc.).
 - Number of out of area students.
 - Utilization factor/classroom usage.

- Summary of five previous years' enrolment and 10-year enrolment projection by grade and program.
- Current extracurricular activities.
- Other School Use Profile:
 - Current non-school programs or services resident at or co-located with the school as well as any revenue from these non-school programs or services and whether or not it is at full cost recovery.
 - Current facility partnerships as well as any revenue from the facility partnerships and whether or not it is at full cost recovery.
 - Community use of the school as well as any revenue from the community use of the school and whether or not it is at full cost recovery.
 - Availability of before and after school programs or services (e.g., child care) as well as any revenue from the before and after school programs and whether or not it is at full cost recovery.
 - Lease terms at the school as well as any revenue from the lease and whether or not it is at full cost recovery.
 - Description of the school's suitability for facility partnerships.

School boards may introduce additional items that could be used to reflect local circumstances and priorities which may help to further understand the school(s) under review.

Each school under review will have a SIP completed at the same point-in-time for comparison purposes. The Ministry of Education expects school boards to prepare SIPs that are complete and accurate, to the best of the school board's ability, prior to the commencement of a pupil accommodation review.

While the ARC may request clarification about information provided in the SIP, it is not the role of the ARC to approve the SIP.

IX. CONSULTATION WITH LOCAL MUNICIPAL GOVERNMENTS

Following the Board of Trustees' approval to undertake a pupil accommodation review, school boards must invite affected single and upper-tier municipalities as well as other community partners that expressed an interest prior to the pupil accommodation review to discuss and comment on the recommended option(s) in the school board's initial staff report.

The invitation for this meeting will be provided through a written notice, and will be directed through the Clerks Department (or equivalent) for the affected single and upper-tier municipalities.

The affected single and upper-tier municipalities, as well as other community partners that expressed an interest prior to the pupil accommodation review, must provide their response on the recommended option(s) in the school board's initial staff report before the final public meeting. School boards must provide

them with advance notice of when the final public meeting is scheduled to take place.

School boards must document their efforts to meet with the affected single and upper-tier municipalities, as well as other community partners that expressed an interest prior to the pupil accommodation review; and provide any relevant information from this meeting as part of the final staff report to the Board of Trustees (see Section XI).

X. PUBLIC MEETINGS

Once a school board has received an initial staff report and has approved the initiation of a pupil accommodation review, the school board must arrange to hold a minimum of two public meetings for broader community consultation on the initial staff report. School board staff are expected to facilitate the public meetings to solicit broader community feedback on the recommended option(s) contained in the initial staff report.

The public meetings are to be announced and advertised publicly by the school board through an appropriate range of media as determined by the school board.

At a minimum, the first public meeting must include the following:

- an overview of the ARC orientation session;
- the initial staff report with recommended option(s); and
- a presentation of the SIPs.

XI. COMPLETING THE ACCOMMODATION REVIEW

Final Staff Report

At the conclusion of the pupil accommodation review process, school board staff will submit a final staff report to the Board of Trustees which must be available to the public as determined in the school board's policy, and posted on the school board's website.

The final staff report must include a Community Consultation section that contains feedback from the ARC and any public consultations as well as any relevant information obtained from municipalities and other community partners prior to and during the pupil accommodation review.

School board staff may choose to amend their proposed option(s) included in the initial staff report. The recommended option(s) must also include a proposed accommodation plan, prepared for the decision of the Board of Trustees, which contains a timeline for implementation.

Delegations to the Board of Trustees Meeting

Once school board staff submits the final staff report to the Board of Trustees, the school board must allow an opportunity for members of the public to provide feedback on the final staff report through public delegations to the Board of Trustees. Notice of the public delegation opportunities will be provided based on school board policy.

After the public delegations, school board staff will compile feedback from the public delegations which will be presented to the Board of Trustees with the final staff report.

Decision of the Board of Trustees

The Board of Trustees will be provided with the final staff report, including the compiled feedback from the public delegations, when making its final decision regarding the pupil accommodation review.

The Board of Trustees has the discretion to approve the recommendation(s) of the final staff report as presented, modify the recommendation(s) of the final staff report, or to approve a different outcome.

The Ministry encourages school boards not to make final pupil accommodation review decisions during the summer holiday period (typically from July 1 to the day after Labour Day).

XII. TRANSITION PLANNING

The transition of students should be carried out in consultation with parents/guardians and staff. Following the decision to consolidate and/or close a school, the school board is expected to establish a separate committee to address the transition for students and staff.

XIII. TIMELINES FOR THE ACCOMMODATION REVIEW PROCESS

The pupil accommodation review process must comply with the following minimum timelines:

- Following the date of the Board of Trustees' approval to conduct a pupil accommodation review, the school board will provide written notice of the Board of Trustees' decision within 5 business days to each of the affected single and upper-tier municipalities through the Clerks Department (or equivalent), other community partners that expressed an interest prior to the pupil accommodation review; and include an invitation for a meeting to discuss and comment on the recommended option(s) in the school board's

initial staff report. School boards must also notify the Director(s) of Education of their coterminous school boards and the Ministry of Education through the office of the Assistant Deputy Minister of the Financial Policy and Business Division.

- The affected single and upper-tier municipalities, as well as other community partners that expressed an interest prior to the pupil accommodation review, must provide their response on the recommended option(s) in the school board's initial staff report before the final public meeting.
- Beginning with the date of the Board of Trustees' approval to conduct a pupil accommodation review, there must be no fewer than 30 business days before the first public meeting is held.
- There must be a minimum period of 40 business days between the first and final public meetings.
- The final staff report must be publicly posted no fewer than 10 business days after the final public meeting.
- From the posting of the final staff report, there must be no fewer than 10 business days before the public delegations.
- There must be no fewer than 10 business days between public delegations and the final decision of the Board of Trustees.

XIV. MODIFIED ACCOMMODATION REVIEW PROCESS

In certain circumstances, where the potential pupil accommodation options available are deemed by the school board to be less complex, school boards may find it appropriate to undertake a modified pupil accommodation review process. The *Guideline* permits a school board to include an optional modified pupil accommodation review process in its pupil accommodation review policy.

A school board's pupil accommodation review policy must clearly outline the conditions where a modified pupil accommodation review process could be initiated by explicitly defining the factors that would allow the school board the option to conduct a modified pupil accommodation review process. The conditions for conducting a modified pupil accommodation review process need to be based on two or more of the following factors:

- distance to the nearest available accommodation;
- utilization rate of the facility;
- number of students enrolled at the school; or
- when a school board is planning the relocation (in any school year or over a number of school years) of a program, in which the enrolment constitutes more than or equal to 50% of the school's enrolment (this

calculation is based on the enrolment at the time of the relocation, or the first phase of a relocation carried over a number of school years).

School boards may consider additional factors that are defined in their pupil accommodation review policy to qualify for the modified pupil accommodation review process. Multiple factors may be developed by the school board to appropriately reflect varying conditions across the board (e.g., urban, rural, elementary panel, secondary panel, etc.). The Board of Trustees must approve these explicitly defined factors, after community consultation, in order to adopt a modified pupil accommodation review process as part of their school board's pupil accommodation review policy.

The guiding principles of this *Guideline* apply to the modified pupil accommodation review process.

Even when the criteria for a modified pupil accommodation review are met, a school board may choose to use the standard pupil accommodation review process.

Implementing the Modified Accommodation Review Process

The initial staff report will explain the rationale for exempting the school(s) from the standard pupil accommodation review process, in accordance with the school board's pupil accommodation review policy.

The initial staff report and SIPs must be made available to the public, as determined in the school board's policy, and posted on the school board's website.

A public meeting will be announced and advertised through an appropriate range of media as determined by the school board.

Following the public meeting, school board staff will submit a final staff report to the Board of Trustees which must be available to the public as determined in the school board's policy, and posted on the school board's website. The final staff report must include a Community Consultation section that contains feedback from any public consultations as well as any relevant information obtained from municipalities and other community partners prior to and during the modified pupil accommodation review.

Once school board staff submit the final staff report to the Board of Trustees, the school board must allow an opportunity for members of the public to provide feedback through public delegations to the Board of Trustees. Notice of the public delegation opportunities will be provided based on school board policy.

After the public delegations, school board staff will compile feedback from the public delegations which will be presented to the Board of Trustees with the final staff report.

The Board of Trustees has the discretion to approve the recommendation(s) of the final staff report as presented, modify the recommendation(s) of the final staff report, or to approve a different outcome.

The Ministry encourages school boards not to make final pupil accommodation review decisions during the summer holiday period (typically from July 1 to the day after Labour Day).

A transition plan will be put in place following the decision to consolidate and/or close a school.

Timelines for the Modified Accommodation Review Process

The modified pupil accommodation review process must comply with the following minimum timelines:

- Following the date of the Board of Trustees' approval to conduct a modified pupil accommodation review, the school board will provide written notice of the Board of Trustees' decision within 5 business days to each of the affected single and upper-tier municipalities through the Clerks Department (or equivalent), other community partners that expressed an interest prior to the modified pupil accommodation review; and include an invitation for a meeting to discuss and comment on the recommended option(s) in the school board's initial staff report. School boards must also notify the Director(s) of Education of their coterminous school boards and the Ministry of Education through the office of the Assistant Deputy Minister of the Financial Policy and Business Division.
- The affected single and upper-tier municipalities, as well as other community partners that expressed an interest prior to the modified pupil accommodation review, must provide their response on the recommended option(s) in the school board's initial staff report before the final public meeting.
- The school board must hold at least one public meeting. Beginning with the date of the Board of Trustees' approval to conduct a modified pupil accommodation review, there must be no fewer than 30 business days before this public meeting is held.
- The final staff report must be publicly posted no fewer than 10 business days after the final public meeting.
- From the posting of the final staff report, there must be no fewer than 10 business days before the public delegations.
- There must be no fewer than 10 business days between public delegations and the final decision of the Board of Trustees.

XV. EXEMPTIONS

This *Guideline* applies to schools offering elementary or secondary programs. However, there are specific circumstances where school boards are not obligated to undertake a pupil accommodation review. These include:

- where a replacement school is to be built by the school board on the existing site, or built or acquired within the existing school attendance boundary, as identified through the school board's policy;
- where a replacement school is to be built by the school board on the existing site, or built or acquired within the existing school attendance boundary and the school community must be temporarily relocated to ensure the safety of students and staff during the reconstruction, as identified through the school board's policy;
- when a lease for the school is terminated;
- when a school board is planning the relocation (in any school year or over a number of school years) of grades or programs, in which the enrolment constitutes less than 50% of the school's enrolment (this calculation is based on the enrolment at the time of the relocation, or the first phase of a relocation carried over a number of school years);
- when a school board is repairing or renovating a school, and the school community must be temporarily relocated to ensure the safety of students during the renovations;
- where a facility has been serving as a holding school for a school community whose permanent school is over-capacity and/or is under construction or repair; or
- where there are no students enrolled at the school at any time throughout the school year.

In the above circumstances, a school board is expected to inform school communities about proposed accommodation plans for students before a decision is made by the Board of Trustees. The school board will also provide written notice to each of the affected single and upper-tier municipalities through the Clerks Department (or equivalent), as well as other community partners that expressed an interest prior to the exemption, and their coterminous school boards in the areas of the affected school(s) through the Director of Education, and to the Ministry of Education through the Assistant Deputy Minister of the Financial Policy and Business Division no fewer than 5 business days after the decision to proceed with an exemption.

A transition plan will be put in place following the Board of Trustees' decision to consolidate, close or move a school or students in accordance with this section.

XVI. DEFINITIONS

Accommodation review: A process, as defined in a school board pupil accommodation review policy, undertaken by a school board to determine the future of a school or group of schools.

Accommodation Review Committee (ARC): A committee, established by a school board that represents the affected school(s) of a pupil accommodation review, which acts as the official conduit for information shared between the school board and the affected school communities.

ARC working meeting: A meeting of ARC members to discuss a pupil accommodation review, and includes a meeting held by the ARC to solicit feedback from the affected school communities of a pupil accommodation review.

Business day: A calendar day that is not a weekend or statutory holiday. It also does not include calendar days that fall within school boards' Christmas, spring, and summer break. For schools with a year-round calendar, any break that is five calendar days or longer is not a business day.

Consultation: The sharing of relevant information as well as providing the opportunity for municipalities and other community partners, the public and affected school communities to be heard.

Facility Condition Index (FCI): A building condition as determined by the Ministry of Education by calculating the ratio between the five-year renewal needs and the replacement value for each facility.

On-the-ground (OTG) capacity: The capacity of the school as determined by the Ministry of Education by loading all instructional spaces within the facility to current Ministry standards for class size requirements and room areas.

Public delegation: A regular meeting of the Board of Trustees where presentations by groups or individuals can have their concerns heard directly by the school board trustees.

Public meeting: An open meeting held by the school board to solicit broader community feedback on a pupil accommodation review.

School Information Profile (SIP): An orientation document with point-in-time data for each of the schools under a pupil accommodation review to help the ARC and the community understand the context surrounding the decision to include the specific school(s) in a pupil accommodation review.

Space template: A Ministry of Education template used by a school board to determine the number and type of instructional areas to be included within a new school, and the size of the required operational and circulation areas within that school.



MINISTRY OF EDUCATION

**COMMUNITY PLANNING AND PARTNERSHIPS
GUIDELINE**

March 2015

Purpose

The purpose of the *Community Planning and Partnerships (CPP) Guideline* is to encourage school boards to reach out to community organizations to share planning information with community organizations on a regular basis. In particular, boards are encouraged to ensure that additional efforts are made to share this information with community organizations prior to commencing a pupil accommodation review.

This information sharing will allow school boards and other entities to work together to the benefit of boards, students and the community, and to optimize the use of public assets owned by school boards. This *Guideline* is intended to assist boards in establishing more facility partnerships, and to support effective planning with community partners regarding land-use and green space/park planning. Boards are expected to revise or develop their own policy/policies that are consistent with this *Guideline*.

This *Guideline* focuses on opportunities to share facilities with community partners when building new schools and undertaking significant renovations, when considering the use of unoccupied space in schools, and when considering properties associated with schools that may close and sites that may be considered for future disposition. The *Guideline* is consistent with the legal framework outlined in the *Education Act* regarding the disposition of both surplus and non-surplus property and the joint use of schools.

Overview

Cooperative and collaborative relationships between school boards and community organizations are part of the foundation of a strong, vibrant and sustainable publicly funded education system. Around the province, school boards have successful facility partnerships with co-terminous boards and other entities that enable boards to reduce facility costs and/or improve educational opportunities. Some boards have successfully leased or sold space to their local municipality, resulting in a re-purposed local community hub or in protected public access to green space/parks. The Ministry is encouraging boards and their community partners to build on that success by putting measures in place to increase the opportunities for expanding the number of partnerships as well as long-term planning in a way that is well-informed, well-coordinated, transparent, sustainable and supportive of student achievement.

It is the responsibility of all levels of government to make the best use of public assets. The twin challenges of local enrolment changes and making the best use of education funding to support student achievement create an incentive and opportunity to maximize the use of school board facilities and properties. Offering space in schools to partners can also strengthen the role of schools in communities, provide a place for programs and facilitate the coordination of, and improve access to, services for students and the wider community.

School boards' primary responsibility is to support the achievement and safety of students. Within that context, the intent of the *Community Planning and Partnerships Guideline* is to:

- Reduce facility operating costs for school boards and government;
- Improve services and supports available to students;
- Strengthen relationships between schools boards and community partners and the public;

- Maximize the use of public infrastructure through increased flexibility and utilization; and
- Provide a foundation for improved service delivery for communities.

The *Guideline* has eight components, outlined below:

1. The identification of CPP opportunities in board planning.
2. The development or review of board CPP policies.
3. The development of a process to notify community partners.
4. Planning for an annual CPP meeting.
5. School board planning prior to a pupil accommodation review.
6. The consideration of opportunities for co-building with community partners.
7. The consideration of opportunities for sharing unused space in schools with community partners.
8. Partnership agreements and cost-recovery.

School boards have the authority to make decisions regarding their school facilities and the use of their properties that are consistent with the *Education Act*. This *Guideline* does not prevent boards from building, renovating or closing schools or from disposing of surplus assets when required. Boards will continue to identify which schools will or will not be suitable for facility partnerships based on board-determined criteria.

Boards will continue to follow Ontario Regulation 444/98 regarding the lease or sale of surplus assets, including schools or parts of schools. Boards currently have the authority to co-build schools with other entities and to enter into a variety of facility partnerships through license or joint use agreement as outlined in paragraph 44 of subsection 171 (1), paragraph 4 of subsection 171.1 (2), and sections 183, 194 and 196 of the *Education Act*, although the *Education Act* requires Minister approval in some circumstances. While boards will continue to declare facilities and unused space surplus where appropriate, the Ministry recognizes that there are circumstances in open and operating schools where a board may not consider unused space to be surplus. These circumstances may be related to enrolment fluctuations, program changes or the size of space. Boards may choose to enter into license or joint use agreements for space that is unused but not surplus.

The *Guideline* is not intended to disrupt agreements with existing facility partners. The *Guideline* focuses on facility partnerships, and does not address the service or program exchanges between boards and community organizations or other entities. Strong partnerships between boards and service providers can and do exist without co-location. At the same time, experience demonstrates that the sharing of facilities may create opportunities for coordination and collaboration in service and program delivery, so boards are encouraged to build relationships with their facility partners.

The Ministry recognizes that encouraging community planning and facility partnerships will be most effective when community partners work with school boards and notify them in a timely manner when they are looking for space or considering new construction.

1. School Board Planning and Broader Community Objectives

School boards are expected to have capital plans that address the future needs of their students. Areas of enrolment growth and decline should be presented. Plans should include

enrolment projections, school capacity, renewal needs, potential consolidations and the construction of new schools or additions, including significant renovations.

Through this planning process, boards forecast where new schools or additions may be needed; which schools will remain well-utilized; which open and operating schools may have unused space; and which schools may be candidates for consolidation or closure. This information will assist boards in identifying facilities that may be suitable for facility partnerships with respect to new construction and unused space in schools and in administrative buildings. It also provides an opportunity to consider potential surplus properties in which community partners may be interested.

School boards are expected to share this planning information with community partners so that external entities may have sufficient time to respond to presented opportunities. These opportunities may include participation in a facility partnership or contribution to land-use or green space/park plans. Boards are expected to include information related to their CPP policy and discussions with community organizations in school information profiles when undertaking the accommodation review process.

Where unused space is declared surplus, boards will continue to follow the circulation process outlined in O. Reg. 444/98. Where the unused space in open and operating schools is not surplus, but is available for partnership, or where the partnership opportunity involves new construction, the information will be provided to potential partners through the notification process outlined in Section 3 below.

2. Community Planning and Partnership (CPP) Policies

It is the role and responsibility of school boards to determine what facilities are suitable and not suitable for facility partnerships, what entities are suitable and not suitable partners, and when to enter into a partnership. The intent of the *Community Planning and Partnerships Guideline* is to ensure that these decisions are made in a way that is well-informed, well-coordinated, transparent and consistent with student achievement and safety.

Boards are expected to develop CPP policies that identify:

- Principles and criteria regarding the eligibility of partners;
- How available space in schools will be selected;
- What entities will be selected for the notification list;
- How potential partners will be notified of available space and construction plans;
- How entities will be selected for partnerships, including prioritization, if applicable.

When developing criteria regarding the eligibility of partners, boards are expected to consider the value of the partnership to students. Boards, in compliance with local bylaws, may consider both for-profit and non-profit entities, as they see fit. Boards will also incorporate the following requirements:

- Health and safety of students must be protected.
- Partnership must be appropriate for the school setting.
- Partnership must not compromise the student achievement strategy.

- Entities that provide competing education services such as tutoring services, JK-12 private schools or private colleges, and credit offering entities that are not government-funded, are not eligible partners.

At a minimum, board CPP policy or policies are expected to reflect the requirements of the Ministry *Guideline*. Where a board has more than one policy related to facility partnerships, the board is encouraged to ensure all relevant policies are accessible to and understandable by the public.

Facility sharing between publicly funded school boards through co-ownership, lease or other agreements remains a priority for the Ministry and school boards. Board facility partnerships policies should not disadvantage co-terminous boards that have priority status under O. Reg 444/98.

3. CPP Notification Process

For surplus space being offered for sale or lease, boards will continue to follow the circulation process outlined in O. Reg. 444/98. For non-surplus space, boards will follow a new notification process similar to the circulation process in O. Reg. 444/98.

For the notification process, boards are to post information on their website regarding their intention to build new schools and to undertake significant renovations and information regarding unused space in open and operating schools and administrative buildings that is available for facility partnerships. This information should be updated at least once a year in the case of space in existing schools, and as needed in the case of co-building opportunities. Boards are also expected to post on their website the name and contact information of the staff member at the board who will respond to questions regarding facility partnerships throughout the year.

Boards are also expected to inform entities on their notification list when key information regarding community planning or facility partnerships is changed or updated. To create the notification list, boards will address the following requirements:

- List will reflect at a minimum the entities listed in Ontario Regulation 444/98 – Disposition of Surplus Real Property, and must specifically include:
 - All applicable levels of municipal government (single, upper, lower tiers)
 - Applicable District Social Services Administration Board(s) or Consolidated Municipal Service Manager(s)
 - Applicable Public Health Boards, Local Health Integration Networks and Children’s Mental Health Centres
- Boards may prioritize their notification list as they see fit.
- If child care operators or government-funded organizations request it, they will be added to the notification list.
- Boards may add any other entity to their notification list based on their CPP policy.

4. Annual CPP Meeting

Boards are to hold **at least** one meeting per year to discuss potential planning and partnership opportunities with the public and community organizations. Additional staff-level meetings may be held to discuss additional information with relevant entities. Boards are

expected to notify both the entities on their notification list and the general public about the annual meeting.

During the annual CPP meeting, the school board will provide/present all or a portion of the board's capital plan (as described in Section 1.), details of any schools deemed eligible for facility partnerships, relevant information available on their website and any supplementary CPP information. This information should be shared either during the public meeting or during the optional staff-level meeting, as appropriate.

When inviting entities on the notification list to the annual meeting, school boards must clearly request that organizations prepare to bring relevant planning information, including but not limited to, population projections, growth plans, community needs, land-use and green space/park requirements. The school board is to listen to what needs or plans community partners may have. The invitation list, the entities in attendance at the annual CPP meeting and any information exchanged should be formally documented by the school board.

The CPP meeting may be a stand-alone meeting or may be held as part of a scheduled board meeting. Boards that cover a large geography may want to consider holding meetings in more than one community over time.

5. School Board Planning Prior to a Pupil Accommodation Review

In addition to the annual CPP meeting, school boards should continue discussions with affected municipalities and other community organizations as they explore options to address underutilized space issues in schools within specific areas of their board. These discussions will inform proposals that school board staff may present to the Board of Trustees, including recommendations to undertake a pupil accommodation review process.

As part of these discussions with community organizations, school boards should obtain a clear indication of any community planning and partnership opportunities in areas where a pupil accommodation review may take place. Additionally, school boards are to request technical information from the local municipality or municipalities where a planned pupil accommodation review will occur. This technical information is to be specified by the school board and can include, but is not limited to, population and future development projections in the area.

The *Pupil Accommodation Review Guideline* provides a full description of the pupil accommodation review process that school boards are required to undertake prior to making a pupil accommodation decision.

6. Co-building with Community Partners

The construction of new schools, additions and renovations represents a significant public investment in a long-term asset. It is also an opportunity to leverage other infrastructure investments by co-building with entities that provide services and programs for children, their families and the broader community. For example, a municipality may seek to build an adjoining community centre or child care centre.

The Ministry's objective is to give potential partners enough time to evaluate their own need

for a new facility and to identify funding sources. As part of the planning process, when considering building a new school or undertaking a significant addition or renovation, boards are expected to notify the entities on their notification list 1 to 3 years prior to the potential construction start date. Boards should provide as much information as possible about their plans and the site to support potential partners in determining the project's suitability for their purposes.

The notification should be supported by a board resolution. Boards do not need to have an identified source of funding or Ministry approval when they notify their partners of their plan or intention to build. Similarly, plans to build may be contingent on board decisions that have not yet been made.

Once notified, entities may express their interest in co-building with the board. The board will then evaluate the expressions of interest to select partner(s) based on its CPP policy. The Minister's approval may be required depending on the provision under the *Education Act* authorizing the transaction. Partnership agreements cannot be finalized until both the board and the partner/s have an approved source of funding. Requests for Ministry funding and requests for transfer from reserve approvals are expected to reflect that boards have already solicited interest from partners. The Ministry prefers that boards and facility partners have ownership of their respective portions of the facility, where the portions are sizeable.

Boards should encourage community partners to provide notification to the board when community partners have proposals or plans to build their own new facilities. Boards should enable community partners to provide this information directly or during the facility partnership-related public meetings held by the board. When building or renovating schools, school boards and the Ministry often have deadlines related to student accommodation needs or funding parameters. School boards are expected to make their timelines clear to potential partners and may establish policies to ensure that timelines are maintained.

7. Sharing Unused Space in Existing Schools with Community Partners

The Ministry expects that boards will review underutilized open and operating schools and administrative facilities for their suitability for partnership, based on criteria outlined by the board. As a starting point, boards should review facilities that have been 60 percent utilized or less for two years and/or have 200 or more unused pupil places, and then should extend their review to other potentially suitable facilities. Boards must consider the space needs of existing educational programming and initiatives.

The Ministry recognizes that available space is not the only criteria for selecting schools for partnerships. Boards will also consider issues related to student safety, the board's student achievement and pupil accommodation strategies (including those that may result in school consolidations and closures), zoning and site use restrictions, facility condition, the configuration of space and the ability to separate the space used by partners from the space used by students, among other factors. These factors should be outlined in the board's CPP policy.

If the space is both suitable for facility partnerships and is available for the long-term, boards are expected to consider declaring the space surplus and circulating it for lease through O. Reg. 444/98. If the space is suitable for facility partnerships but is not surplus to board needs, boards are expected to follow the notification process outlined in the *Guideline*. This notification should be supported by a board resolution. Boards are expected to provide

information about the available space, including but not limited to size, location, facility amenities, and required renovations, if needed.

Entities may then express their interest in using the space. Boards will evaluate the expressions of interest to select partner(s) based on their CPP policy. Boards then may enter into a license or joint use agreement. The Minister's approval may be required depending on the provision under the *Education Act* allowing the transaction.

8. Partnership Agreements and Cost-Recovery

Boards are responsible for providing clear instructions to potential partners regarding their rights and responsibilities as tenants, including maintenance standards and the applicability, or the lack thereof, of board user policies, including accessibility and inclusiveness policies. Boards are responsible for ensuring proper legal agreements that respect the *Education Act* and protect their rights.

Boards are not expected to take on additional costs to support facility partnerships, although boards will continue to use their discretion in supporting partnerships based on their student achievement strategy. On a cost-recovery basis, the fees charged to partners should cover the operations and capital cost, including administrative costs and property taxes (if applicable), to the board of the space occupied by the partner. Additional costs to perform minor renovations to protect student safety, provide appropriate washrooms, and otherwise make the space suitable for use by facility partners should be borne by the partners. Financial expectations should be made clear to potential partners in the board's policy.

In co-building, partners will be required to pay for and finance their share of construction, including a proportional share of joint-use or shared space. Boards will continue to be expected to build within Ministry space and funding benchmarks for the board portion of the facility.