

Community Planning and Facility Partnerships Policy 319



Category:	Administration
Administered by:	Director of Education or Designate
First adopted:	April 2010 (former Facility Partnerships Policy)
Revision History:	June 2016
Next Review:	2020-2021 School Year

1. Policy Statement

- 1.1 It is the policy of the Upper Grand District School Board (UGDSB) to support and provide direction necessary to achieve the board's overall Vision, Guiding Principles and Strategic Plan priorities.
- 1.2 Within the framework of its primary responsibility to support student achievement and safety, the UGDSB recognizes that facility partnerships can:
 - reduce facility operating costs for school boards and governments;
 - improve services and supports available to students;
 - strengthen relationships between school boards, 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.

2. Details

- 2.1 The board's long-term capital and accommodation planning takes into account opportunities for partnerships with other school boards (if viable) and appropriate public organizations that are financially sustainable, safe

for students and support the board's Vision, Guiding Principles and Strategic Plan priorities.

- 2.2 Community planning and partnerships are an integral part of the board's Pupil Accommodation Review process. Regular discussions between Board staff and affected municipalities and community organizations regarding partnerships will inform proposals that Board staff may present to the Board of Trustees, including recommendations to undertake a Pupil Accommodation Review process.
- 2.3 It is the role and responsibility of the UGDSB to determine what facilities are suitable or not suitable for facility partnerships, what entities are suitable and not suitable partners, and when to enter into a partnership.

3. References

This policy operates in conjunction with:

- Education Act
- Ministry of Education Community Planning and Partnerships Guideline (Rev March 2015)
- UGDSB Policy 305 – Pupil Accommodation Review
- UGDSB Policy 320 – School Boundary Review
- Ontario Regulation 444/98 – Disposition of Surplus Real Property
- UGDSB Policy 311 – Disposal of Board Property
- UGDSB Policy 200 – Community Use of Schools

Community Planning and Facility Partnerships

Procedures Manual 319-A



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Administered by:	Director of Education or Designate
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1. Terms and Definitions

Attendance area

A geographical area where the boundaries of which are designated by the board to provide for the educational needs of the children of the area.

Board Staff

Refers to resource staff from different board departments including but not limited to Superintendents of Education, Finance, Operations and Capital, Planning and the Principal(s) for the schools involved.

Co-building opportunities

When the Board has approved the potential for a partnership in a new school, addition or significant renovation project in an existing facility.

Consolidation

The reorganization of students into one or more schools within the same review area and/or into a new school.

Facility partnerships

Mutually beneficial and supportive arrangements between the board and business, community and government agencies.

Facility Partnership Agreement

A legal document that outlines the terms and conditions of the partnership, and complies with all existing Upper Grand District School Board policies and procedures. The agreement is signed by both/all parties prior to implementation.

Long-term capital and accommodation planning

A comprehensive review that considers the condition and utilization of current facilities, and possible accommodation solutions designed to enhance achievement, learning opportunities and well-being for students.

Notification List

The board's Notification List includes:

- entities listed in Ontario Regulation 444/98 including all applicable levels of municipal government
- applicable District Social Services Administration Board(s) or Consolidated Municipal Service Manager(s)
- Wellington-Dufferin- Guelph Public Health
- Waterloo Wellington Local Health Integration Network
- children's mental health centres
- child care providers with current operations in UGDSB schools
- other existing partners in UGDSB facilities

On the ground (OTG) capacity

Refers to the capacity of a school as determined by the Ministry of Education by loading all instructional spaces within a facility to current Ministry standards for class size requirements and room areas. OTG capacity does not include capacity in temporary facilities (i.e. portables or portapaks).

Overcrowded

Full Time Equivalent (FTE) enrolment exceeds a school's On the Ground (OTG) capacity resulting in a utilization rate of 110% or higher.

Partners

Community non-profit or profit entities expressing interest in participating in Facility Partnership Agreements that are deemed eligible by the board.

Review area

The attendance area of an individual school or group of schools, family of schools, municipal or any other geographic area.

Underutilized

Full Time Equivalent (FTE) enrolment falls below a school's On the Ground (OTG) capacity resulting in a utilization rate of 80% or lower.

Unused space

Unoccupied space in a facility that has not been declared surplus to the needs of the board.

Utilization

A measure of the extent to which a school is operating at full capacity. The board uses two points of reference to compare school utilization; Underutilized and Overcrowded.

2. Identification of Facility Partnership opportunities in Board Planning

- 2.1 The Upper Grand District School Board is committed to improving the learning environment in its schools and enhancing learning opportunities and well-being for students.
- 2.2 The Upper Grand District School Board will prepare and update long-term capital and accommodation planning information to address the future accommodation needs of its students including:
 - enrolment projections
 - school capacity/utilization
 - renewal needs
 - potential consolidations (closures)
 - construction projects (new schools, additions, significant renovations)
- 2.3 The Upper Grand District School Board will use the long-term capital and accommodation planning information as the basis for identifying space that is suitable for facility partnerships and co-build opportunities and unused space in schools. This information also provides an opportunity to consider potential surplus properties in which community partners may be interested.
- 2.4 Annually, in the spring, the board receives the Identified Schools Reports (Elementary and Secondary) that include a section which identifies schools with space eligible for potential facility partnerships.
- 2.5 Annually in the fall, the Partnership Report, which identifies potential partnership space and co-build opportunities, is presented to the Board of

Trustees for consideration. Approval of partnership space or co-build opportunities by the Board of Trustees is necessary.

- 2.6 Identification of facilities suitable for facility partnerships will take into consideration several criteria including:
 - 2.6.1 Facilities that have been 60% utilized or less for the past two (2) years and/or facilities that have had two hundred (200) or more unused pupil places for at least the past two (2) years.
 - 2.6.2 Facilities that are projected to be 60% utilized or less for the next five (5) years.
 - 2.6.3 Facilities that have not been designated as surplus space as per Ontario Regulation 444/98.
 - 2.6.4 Facilities that have space available for the self-contained, exclusive and secure use of the partners, separate from the school's day to day operations.
 - 2.6.5 Facilities that have space that is not required for board programming.
 - 2.6.6 Future co-building opportunities known at the time of the presentation of the Partnership Report.
- 2.7 Following the Board of Trustees' approval, entities on the Notification List will be advised of available partnership space or co-build opportunities.
- 2.8 Information on available partnership space or co-build opportunities will be posted on the board's website.
- 2.9 A Community Planning and Partnerships public meeting will be held by the Upper Grand District School Board to provide information on available partnership space or co-build opportunities.

3. Partner Eligibility

- 3.1 Entities identified on the Notification List will be considered eligible partners.
- 3.2 Entities that express an interest in becoming a partner will be subject to review by the Property Committee.

- 3.3 Partner eligibility will be based on the following:
- 3.3.1 Health and safety of students.
 - 3.3.2 Appropriateness of partnership and its associated activities for a school setting.
 - 3.3.3 Partnership will not compromise student achievement and the operation of school site or facility.
 - 3.3.4 Partnership does not provide competing education services (i.e. tutoring services, JK-12 private schools or colleges or credit offering entities that are not government funded).
 - 3.3.5 Zoning and site use restrictions.
 - 3.3.6 Facility condition including the adequacy of utilities.
 - 3.3.7 Partnerships will exist on a cost-recovery basis to the board.
- 3.4 In addition to the above criteria, the potential partner must:
- 3.4.1 Be able to pay for and finance their share of the capital costs of construction, including a proportional share of joint-use or shared space.
 - 3.4.2 Agree to operate in accordance with board policies.
 - 3.4.3 Be willing to enter into a lease, license, or joint-use/facility partnership agreement.
 - 3.4.4 Be able to cover the cost of agreement preparation and pay for rent, utilities and the operational costs of the space.
 - 3.4.5 Be able to bear the costs of renovations to protect student safety, provide appropriate washrooms and otherwise make the space suitable for use by the partner.

4. Communication to the Community

- 4.1 The Upper Grand District School Board will inform entities on the Notification List when key information regarding community planning or facility partnerships is changed or updated.

- 4.2 The Upper Grand District School Board will hold a Community Planning and Partnerships public meeting annually to discuss potential partnership opportunities with community organizations and the public.
- 4.3 Notice of the meeting will be sent to the entities on the Notification List and the general public. Additional staff-level meetings may be held to discuss additional information with relevant entities.
- 4.4 When inviting entities on the Notification List to the annual meeting, the board will clearly request that organizations bring relevant planning information, including but not limited to, population projections, growth plans, community needs, land-use and green space/park requirements to the meeting.
- 4.5 When the Upper Grand District School Board has determined surplus space for sale or lease, it will follow the circulation process outlined in Ontario Regulation 444/98.
- 4.6 For non-surplus space, the Upper Grand District School Board will follow a new notification process similar to the circulation process in Ontario Regulation 444/98.
 - 4.6.1 Information will be posted on the board's website regarding the following:
 - intention to build new schools
 - intention to undertake significant renovations
 - information regarding unused space that is available for facility partnerships
 - 4.6.2 The information on available space in existing schools will be updated annually and as needed in the case of co-building opportunities.
 - 4.6.3 The Manager of Planning will be the contact name provided on the website responsible for responding to questions regarding potential facility partnerships.

5. Applications and Proposals

- 5.1 A partner or potential partner may submit a Partnership Project Application (Appendix A) to the board expressing interest in the use of available partnership space.
- 5.2 The Partnership Project Application will include the following:
 - name of the partner/proposed partner
 - the available space of interest
 - a brief outline of the considered use of the space
 - financial details and availability of funds
 - contact information
 - any other information or details required by the board
- 5.3 Partner eligibility criteria will be applied to the application by the board's Property Committee.
- 5.4 An administration fee will be applied to cover the board's cost to process the application will be applied.
- 5.5 Partners who are deemed by the Property Committee to have eligible partnership applications may be invited to submit a Partnership Project proposal to the board.
- 5.6 The necessary requirements of a Partnership Project proposal will be developed by the board, and reviewed and revised as required.
- 5.7 At a minimum, Partnership Project proposals must include:
 - 5.7.1 A description of the service(s) to be provided.
 - 5.7.2 A description of how the service supports the board's mandate.
 - 5.7.3 A complete financial breakdown for the project's development and ongoing operation.
 - 5.7.4 A concise description of space needs, including size of the space, number of rooms, washroom and parking requirements, renovations and capital changes necessary, zoning amendments, hours of operation, and number of users/clients/occupants.



- 5.8 An administration fee will be applied for reviewing a Partnership Project proposal.
- 5.9 Board Staff will review the Partnership Project proposal to determine if it is complete, and appropriate for the facility and for the board.
- 5.10 All costs of the development of the Partnership Project proposal will be borne entirely by the partner including: the application process, legal costs, obtaining information on rezoning, building and/or renovations, and any other costs involved in developing the proposal.

6. Co-building with Community Partners

- 6.1 The Upper Grand District School Board will notify entities on the Notification List one (1) to three (3) years prior to considering building a new school or undertaking a significant addition or renovation to a school.
- 6.2 The Board does not need to have an identified source of funding or Ministry approval when they notify their partners of their plan or intention to build and/or renovate and any opportunities for co-building.
- 6.3 The Board will supply all available information about the project in order to allow potential partners to evaluate the possibility of a co-building opportunity.
- 6.4 Co-building opportunities will not impede the construction schedule and requirements of the board.
- 6.5 Partnership agreements will not be finalized until both the board and the partner(s) have an approved source of funding.
- 6.6 Site size, topography and other restrictions may limit co-building partnership opportunities.
- 6.7 All co-building proposals will be assessed on a case-by-case basis to determine suitability.
- 6.8 The Upper Grand District School Board encourages entities on the Notification List to provide notice to the board when they have proposals or plans to build new facilities.

7. Partnership Agreements and Cost-Recovery

- 7.1 No additional costs will be incurred by the Board to support facility partnerships.
- 7.2 All partnerships will be on a full cost-recovery basis. Fees charged to partners will cover the operations and capital cost, including administrative costs and property taxes (if applicable) to the board for the space occupied by the partner for the duration of the partnership agreement.
- 7.3 Additional costs to perform renovations to protect student safety, provide appropriate washrooms, and otherwise make the space suitable for use by facility partners will be borne by the partners.
- 7.4 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.
- 7.5 The costs involved in applying for partnership space or co-building opportunities and developing and submitting a Partnership Project proposal will be borne by the partner. Further, all partners will be required to enter into a partnership agreement developed by the board, with the costs of the development of the agreement to be paid by the partner.

8. Intermittent, Temporary or Part Time Use

- 8.1 Potential partners requiring a small amount of space, space for intermittent use, or on a temporary or part time basis is covered under UGDSB Policy #200 – Community Use of Schools.

PARTNERSHIP PROJECT APPLICATION

DATE

ORGANIZATION

COMPLETE ADDRESS

CONTACT NAME

TITLE

TELEPHONE

E-MAIL

Location of Interest (name of school or property):

Please provide a brief description of your organization and its goals :

The type and amount of space required by your organization (square footage):

Please provide a brief outline of the intended use of the space requested:

What is your source of funding for this partnership?

What is your target date to begin occupying the space, and for how long?

What would be the hours of operation?

How many staff/visitors/clients would you estimate to access your operations in a day?

How many parking spaces would you require?

Please provide any additional information that you feel is relevant to this application:

Disclaimer: This application does not guarantee a facility partnership with the Upper Grand District School Board. I understand that this is an application form to express interest only. This application will be reviewed by one or more representatives of the Upper Grand District School Board. If this application is considered further in the Upper Grand District School Board's facility partnership development process, additional information may be requested. By clicking the "I Agree" button below and/or submitting this form, I am acknowledging that I understand that submission of this form is only an expression of my interest in a facility partnership.

I Agree

For questions or more information, contact:

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