SUMMARY REPORT

Corporate Planning and Policy Section
Edmonton Planning and Development Department

May 29, 2003

(Approved by City Council, July 2, 2003)

On July 2nd, 2003, Edmonton City Council approved the Future School Sites Study Report and its recommendations. This "Summary Report" was the key output of the study. The Council Agenda and Minutes to this meeting are available on the City's website at:

http://www.edmonton.ca/corp_services/city_clerk/meetings/council_meetings.html

For further information, please contact
Planning and Development Department staff:

Willard Hughes

(780) 496-6223

willard.hughes@edmonton.ca

Doug Kostashuk

(780) 496-6121

doug.kostashuk@edmonton.ca

Planning and Development Department
5th Floor, 10250 – 101 Street NW
Edmonton, Alberta, Canada
*T5J 3P4*

1.0 Introduction

Increasing concern in newly developing areas of the city over the lack of timely delivery of schools to residents and the increased number of longstanding vacant school sites led to the City Council direction that the Planning and Development Department undertake a study in an effort to improve the delivery of school sites. Close to fifty vacant assembled school sites in suburban areas was evidence of a problem.

To undertake this study, Edmonton Planning and Development assembled a team of professionals with a direct involvement in school site planning. The Future School Sites Study (FSSS) Working Committee is comprised of representatives from:

- Alberta Municipal Affairs
- Alberta Infrastructure
- Edmonton Public Schools (Joint Use Agreement partner)
- Edmonton Catholic Schools (Joint Use Agreement partner)
- Urban Development Institute
- Edmonton Federation of Community Leagues
- Edmonton Community Services (Joint Use Agreement partner)
- Edmonton Transportation and Streets
- Edmonton Asset Management and Public Works
- Edmonton Planning and Development

2.0 Future School Sites Study Process

The FSSS Working Committee initiated a *three phase process* for development of a Future School Sites strategy to provide school sites in future communities (see Figure 1).

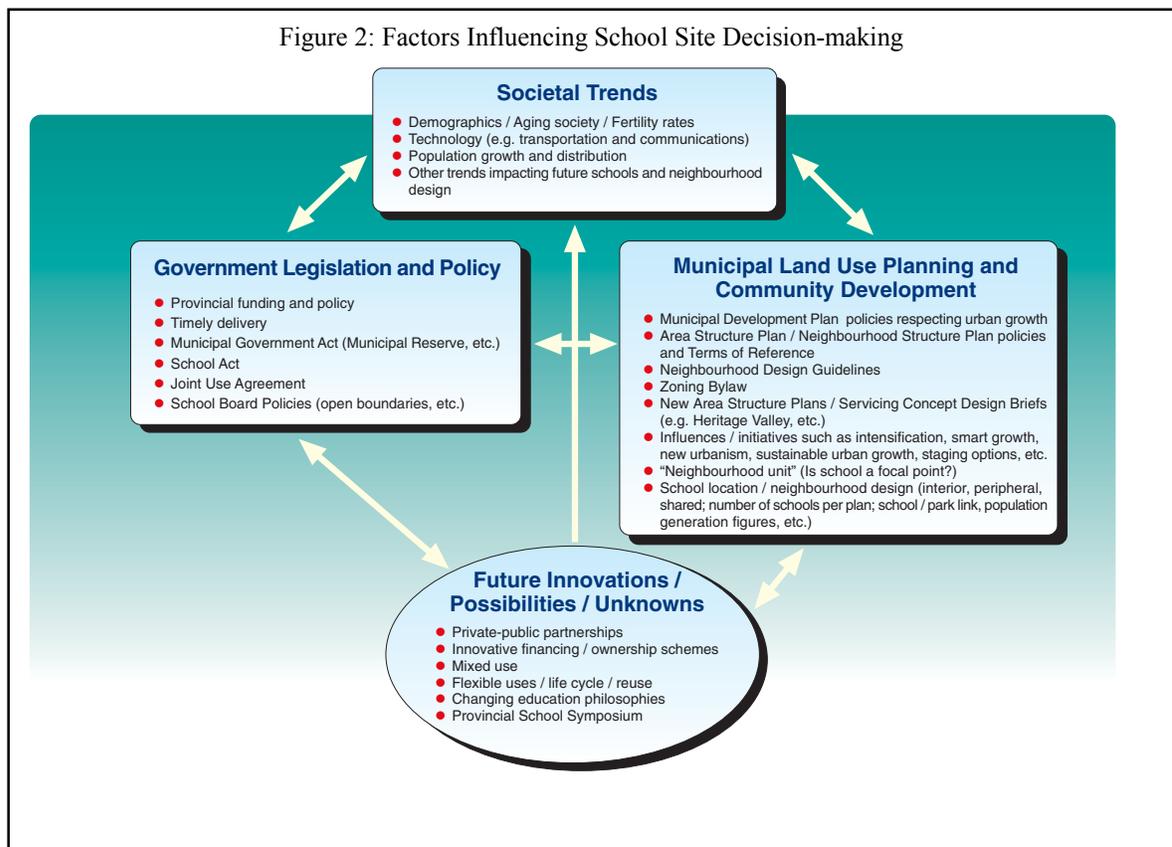Figure 1: Three Phase Future School Sites Study Process
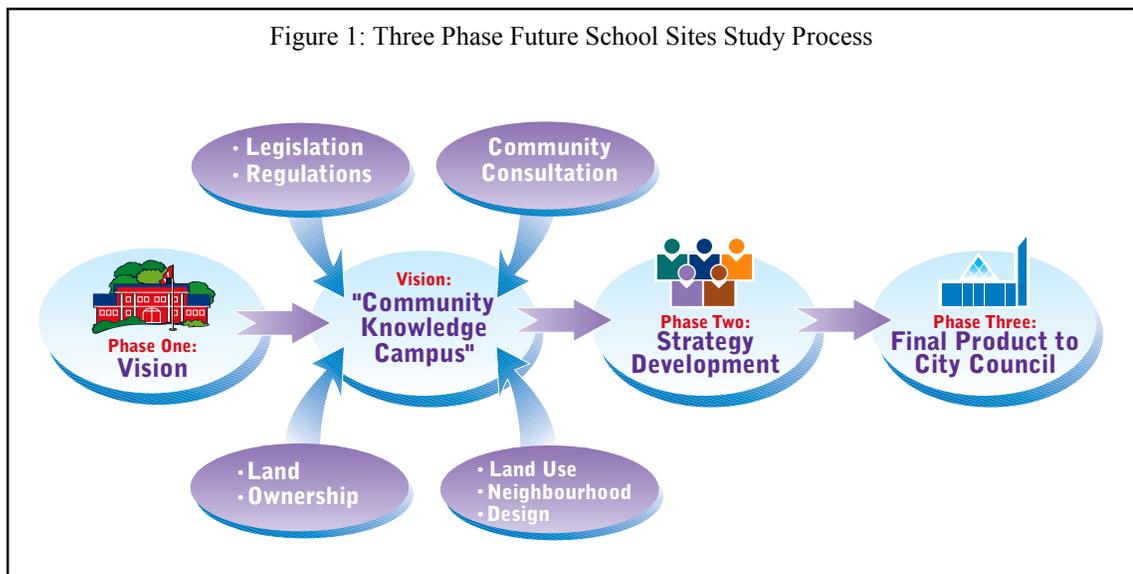
Phase One – Develop a Vision:

Two visioning workshop sessions resulted in production of the Visioning Workshop Session Report. This report summarizes the results of the workshop sessions and the preferred Vision of thirty key stakeholders. The Vision says:

> *"School sites in communities of the future will be centrally located, multi-use "community knowledge campuses" that serve students and learners of all ages and house a range of complementary recreational, community and public services. They will be "beacons" at the heart of the community that are relevant, adaptive, flexible and accessible."*

Phase Two – Develop a Strategy / Model:

Working Committee efforts shifted to the development of a strategy to implement the preferred vision. This included consideration of a wide range of factors influencing school site decision-making with acknowledgement of the limitations in the City's role in the process. (see Figure 2).

Figure 2: Factors Influencing School Site Decision-making

Societal Trends
- Demographics / Aging society / Fertility rates
- Technology (e.g. transportation and communications)
- Population growth and distribution
- Other trends impacting future schools and neighbourhood design

Government Legislation and Policy
- Provincial funding and policy
- Timely delivery
- Municipal Government Act (Municipal Reserve, etc.)
- School Act
- Joint Use Agreement
- School Board Policies (open boundaries, etc.)

Municipal Land Use Planning and Community Development
- Municipal Development Plan policies respecting urban growth
- Area Structure Plan / Neighbourhood Structure Plan policies and Terms of Reference
- Neighbourhood Design Guidelines
- Zoning Bylaw
- New Area Structure Plans / Servicing Concept Design Briefs (e.g. Heritage Valley, etc.)
- Influences / initiatives such as intensification, smart growth, new urbanism, sustainable urban growth, staging options, etc.
- "Neighbourhood unit" (Is school a focal point?)
- School location / neighbourhood design (interior, peripheral, shared; number of schools per plan; school / park link, population generation figures, etc.)

Future Innovations / Possibilities / Unknowns
- Private-public partnerships
- Innovative financing / ownership schemes
- Mixed use
- Flexible uses / life cycle / reuse
- Changing education philosophies
- Provincial School Symposium

Surveys of various Canadian municipal jurisdictions were undertaken. "Best practice" research was done. Expertise information and wisdom from the Working Committee was brought to the table including updates from various studies and ongoing activities from Committee members. Information was also considered from relevant parallel initiatives including the ongoing Provincial Minister's School Symposium.

Study Findings:

Consensus was reached among the Working Committee of the following three general findings:

- **The concept of 'Joint Use' of school and park sites is good.**
  The shared development and use of school sites in conjunction with abutting park sites reinforces strong bonds between schools and communities. Joint use is based upon positive principles of shared use, co-operative planning, shared costs, and efficiency / effectiveness. The dedication of Reserve land for public purposes of providing communities with land for parks, recreation, and schools through the Municipal Government Act (MGA) was confirmed as a legitimate public action now and into the future; also confirmed was the use of the 'joint use agreement' (JUA) mechanism, a framework for the equitable allocation of Reserve lands.

  Commitment exists among agreement partners to make improvements in JUA implementation, within both the current [expiring in 2005] and future agreements. Potential exists for additional future JUA partners.

- ***The 'Community Knowledge Campus' (CKC) Concept is desirable as a means of enhancing a community focal point.***

  The school site is seen to be a significant focal point for a community and the CKC concept is seen as a positive enhancement to the traditional way of developing schools. There is merit in providing a limited range of educational related partnership opportunities within school sites on Municipal Reserve lands. Consideration also should be given to a wider range of compatible community service partners on nearby non-Municipal Reserve lands, whether under private or public ownership. The opportunity for partnerships on school sites allows access to a wider range of community services and can take advantage of efficiencies associated with economies of scale and better use of existing physical infrastructure while meeting changing needs. It allows for flexibility and creativity in designing a CKC using a variety of land interests (reserve, public, private) depending upon the needs of the proponents and community. This enhanced opportunity also recognizes demographic realities, the increased emphasis on lifelong learning etc. This will create an environment that will encourage school sites to first provide core school services, and secondly, a limited range of complementary uses that will enhance its role as a community focal point [Note that a CKC can be developed solely on Reserve land, or can locate on a combination of Reserve lands and private or public (non Reserve) lands; also, note that a school site can be developed with or without partnerships as envisioned in the CKC model]. This enhanced opportunity through a CKC format may contribute to an improved school project proforma and lead to a more timely development on a site, better matching community needs. No changes to provincial or municipal legislation / policies are required to implement the CKC Concept. A

local example is George P. Nicholson Elementary School in Edmonton's Twin Brooks neighbourhood (see Figure 3).

Figure 3: George P. Nicholson Elementary School
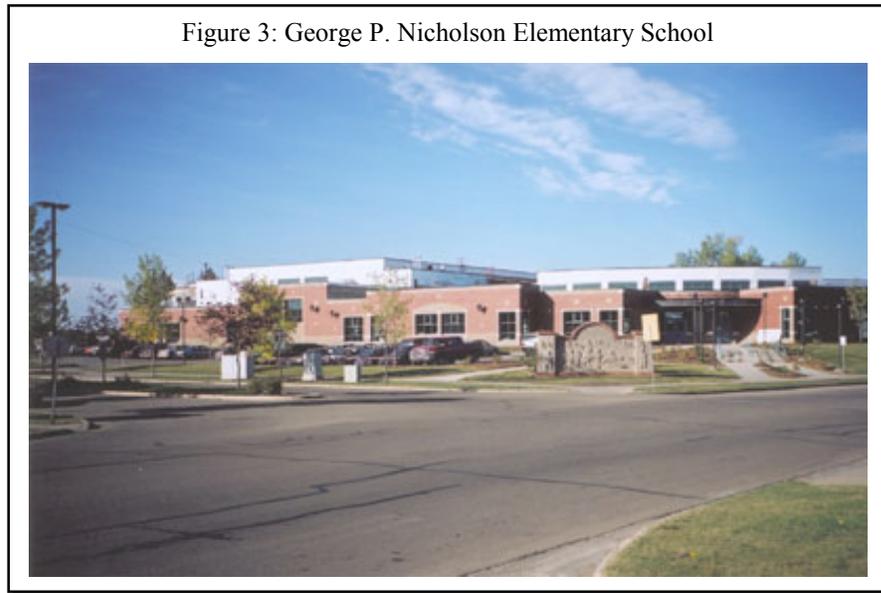
[Note that clearly there are limitations in the MGA regarding partnership opportunities on Reserve lands. The Alberta Infrastructure sponsored Minister's School Symposium is currently reviewing, among other things, the Reserve issue and provincial regulations thereto – and any changes could directly affect partnership options. The City has representation on this issue. The Symposium is also reviewing Alternative Procurement Opportunities (P3s), School in the Community, Sustainable School Buildings and the Planning and Design Process. A final report is expected later in 2003].

- **There will continue to be a shift to community level school sites serving clusters of neighbourhoods.**

Over the years, neighbourhoods in Edmonton have developed in a variety of design formats; however, most traditional neighbourhoods have included an 'elementary school site' near the centre. In recent years, there has been a move away from the 'one elementary school per neighbourhood' model. Factors such as reduced student generation numbers, the "open boundary" policy allowing flexibility of school selection, dispersed development patterns and slow build out under the projected densities and population of new neighbourhoods, the reality of numerous vacant school sites in developing areas (approximately 50 vacant assembled school sites) all cumulatively have resulted in a shift to larger attendance areas being utilised by the Boards. It is expected that this trend will continue and will translate into school sites being located in the centre of communities efficiently serving clusters of neighbourhoods (see Figure 4).

Figure 4: Centrally located with linkages to neighbourhoods
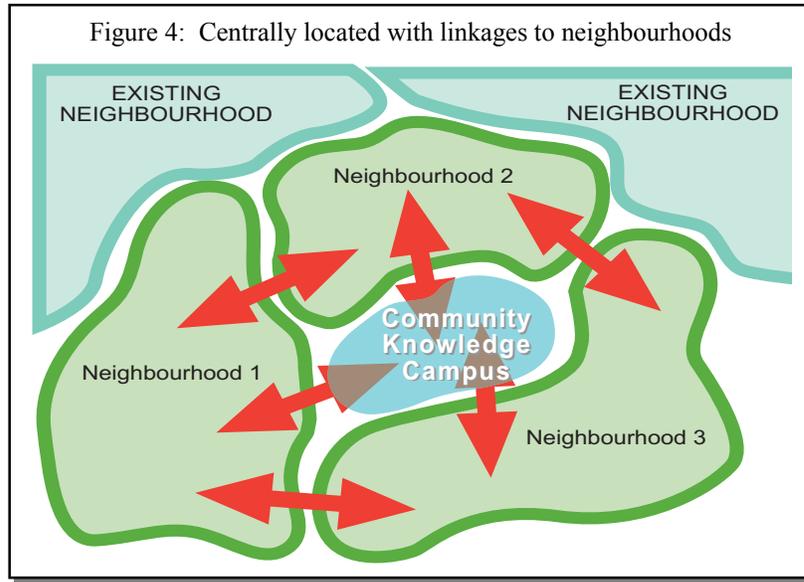
This does not imply a loss of the neighbourhood concept, but rather a more effective placement of schools in the context of neighbourhoods. This will also require careful design and placement of the school / CKC site near the centre of communities and the provision of good access linkages to groupings of neighbourhoods, including adjacent communities already in existence. The School Boards are currently reviewing their strategies / standards (both in existing and future planning areas) so as to improve the delivery of school facilities on school sites when needed. Increased attention is given to projected land requirements to meet school needs. For example, Edmonton Public Schools have recently undertaken reviews of new Plan areas, in efforts to justify or reduce planned school sites. A reduction, consolidation and redistribution in school sites is in process for the Structure Plans of the Lake District, Pilot Sound and Terwillegar Heights. This work continues and involves many stakeholders. Other related initiatives continue involving the Community Services Department and Joint Use Agreement partners in efforts to improve delivery of service.

3.0 Model for School/CKC Sites

The *Vision* in combination with the *Study Findings* provided the foundation for development of a model for the provision of school sites in future communities. In developing the future school sites model [hereafter referred to as *the Model*], a strategy that is overly prescriptive and rigid was not seen to be workable by the Working Committee, in that it would inhibit flexibility, particularly in recognition of the limits of municipal influence and the complexity of stakeholder relationships. Cooperation and clarity of communication among key stakeholders is critical.

The proposed Model is intended for use by all parties *in the business of school site planning and development*. It will serve as a guide for planning the placement of school sites in future communities. The Model is consistent with City plans, policies and directives including the Municipal Development Plan, and the Integrated Services Strategy's *community hubs* concept. No changes to provincial or municipal legislation are required to apply the Model.

The Model, developed by the Working Committee, is comprised of two parts. Part One contains the *Preferred Vision* and *Conceptual Model.* Part Two contains *Land Use Planning Process Requirements and Design Guidelines.*

Part One (see page 7) contains the Preferred Vision, which developed the CKC concept as a focal point of a community. The Conceptual Model considers the Vision and Study Findings and distributes the future sites among three levels – neighbourhood, community and district. The neighbourhood level may not include a school site, and will generally include a park component to meet resident recreation needs. The community and district levels will have a school / CKC site and a joint park site. The important role played by Community Leagues will not be diminished.

The scale and intensity of the school / CKC will be proportionate to the catchment area being served. The Model is intended to serve as a flexible guide and the eventual distribution will be largely determined by the ***School/CKC Needs Assessment*** identified in Part Two.

Part Two (see page 8) of the Model contains Land Use Planning Process Requirements and Design Guidelines that are to be used by Plan proponents in developing plans. A very important element is the ***School/CKC Needs Assessment,*** a proposed new information requirement in the planning process. The Needs Assessment will provide a clear scan of the environment of future school and lifelong learning needs, along with potential CKC partnerships, thereby more effectively delivering educational and thus other potential services to area residents in a more timely manner.

The assessment, as such, is a more rigorous and documented scan of future needs of residents. It will be a product of consultation with all stakeholders, primarily education providers, as well as applicable communities and any potential appropriate CKC partners. The assessment will utilize current student generation numbers, provide projections/scenarios of expected facility timing, and identify issues related to demographics, neighbourhood life cycles, etc.

Completion of this assessment will provide a clear framework for developing an overall plan by providing the necessary information required to develop a conceptual outline showing school site distribution at the neighbourhood, community and district levels. Details on the content, timelines, consultation methods for the *Needs Assessment* will need to be worked out by the Administration and stakeholders, then included in the Structure Plan terms of reference, as an information requirement. The requirement for a Needs Assessment will not apply until such details are concluded.

Part Two also contains two groupings of Design Guidelines. Firstly, *Off-Site Location Guidelines* lists locational criteria for providing school / CKC sites in new communities including items such as central location, accessibility and the like. Secondly, *On-Site Design Guidelines* provides some direction relating to the facilities/uses on the CKC site including such items as safety, shared parking, design innovation that will better enhance safe inter-action within the community that it serves. Lastly*, Land Use Planning Processes/Tools* contain a list of relevant tools/legislation to consider/address in developing a Plan.

Model for the Provision of School / CKC Sites in Future Communities

Future School Sites Study Vision

School sites in communities of the future will be centrally located, multi-use "community knowledge campuses" (CKC) that serve students and learners of all ages and house a range of complementary recreational, community and public services. They will be "beacons" at the heart of the community that are relevant, adaptive, flexible and accessible.

Source: Visioning Workshop, December 2001

Note: To assist in the implementation of the FSSS Vision, the Model consists of two parts:

Part One - *Conceptual Model – three levels of school/CKC sites (neighbourhood, community and district)*

Part Two - *CKC Land Use Planning Process and Design Guidelines – guidelines for preparation of Plans*

Part One – Conceptual Model

This Model serves as a guide for planning the placement of school sites in future communities. It also provides a guide for inclusion of joint use park sites and creates the opportunity for additional potential school site partnership. The school/CKC will be proportionate in scale/intensity to the area being served. The Model is intended to be a flexible guide that can be easily revised to respond to changing needs working closely with Part Two, particularly the required "School/CKC Needs Assessment". This Model can work with or without partnerships.

neighbourhood level

a. definition
Service delivery range is up to approximately 5,000 persons within a single, contained neighbourhood unit, within a Neighbourhood Structure Plan.

b. school/CKC overview

The School/CKC will generally not occur, except for unique situations (e.g. isolated or large neighbourhood). Generally, there will be one park per neighbourhood.

c. potential partnership continuum

TRADITIONAL SCHOOL — PARTNER — UNRESTRICTED PARTNERS

community level

a. definition
Service delivery range is two or more neighbourhoods of 5-20,000 persons within a Neighbourhood Structure Plan or Neighbourhood Area Structure Plan.
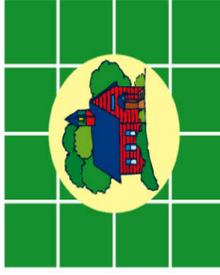
b. school/CKC overview

The School/CKC will locate near the centre of the community to serve clusters of adjacent neighbourhoods. It will include opportunities for a limited range of partnership uses as per MGA limits. It includes a joint use park site and can include a wider range of CKC partners on adjacent non-reserve land.

c. potential partnership continuum

TRADITIONAL SCHOOL — PARTNER — UNRESTRICTED PARTNERS

district level

a. definition
Service delivery range is two or more communities with a population range of 20,000+ persons within an Area Structure Plan or a Servicing Concept Design Brief.

b. school/CKC overview

The School (all levels)/CKC will locate in the centre of the district or sector in a distinct campus style. It will include opportunities for a range of CKC partnerships and will include district level parks. It can include a wider range of CKC partners, with limitations on reserve land.

c. potential partnership continuum

TRADITIONAL SCHOOL — PARTNER — UNRESTRICTED PARTNERS
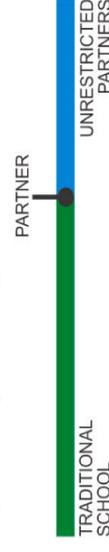
Note: CKC partners on Municipal Reserve land are limited to "school/park/recreation" restrictions of the MGA. Other CKC partnerships are encouraged, but must locate on non-reserve land (or require Municipal Reserve designation removal). [Municipal Reserve provisions are currently under Provincial review].

The following are land use planning process requirements and design guidelines for use by plan proponents in providing school / CKC sites in future communities.

School / CKC Needs Assessment

*A Needs Assessment "scan" is an examination of future school needs, and any potential projected partnership opportunities which provides a framework for the distribution of school / CKC sites within a new Plan area, at the **neighbourhood (N), community (C) and district (D)** levels (as per Part One of the Model). It will…*

- *be required with any structure plan submission (Plan Terms of Reference) and prepared by the proponent of the Plan in collaboration with stakeholders (municipality, education providers, any prospective school partners, landowners and residents,EFCL, known community interests);*
- *maximize awareness and opportunity for successfully meeting future community educational need, including linkages with existing adjacent communities;*
- *use current student generation numbers, undertake projections and scenarios of expected facility timing, issues related to demographics, neighborhood life cycle;*
- *enhance the timely delivery of a school / CKC site in a manner that best matches community need and optimizes the efficient use of land resources;*
- *be updated at various planning stages to best meet changing needs.*

Off-Site Location Guidelines for School / CKC Sites

- *Should be located such that it can be easily serviced and available early in the development of the community;*
- *Should be located central to a cluster or grouping of neighborhoods, and where possible central to attendance (catchment) areas;*
- *Should be double fronting where possible, along a transit route, and in proximity to other services; class of frontage (local, collector, arterial) will depend upon the nature of the CKC, but preferably the frontage should locate on collector roadway;*
- *Should be highly accessible and provide sufficient and safe pedestrian / bicycle linkage throughout the neighborhood / community and promote walkability; where possible, ensure connection to a comprehensive open space / pathway system.*

On-Site Design Guidelines for School / CKC Sites and Facilities

- *Site size and configuration, including park component, shall be designed with flexibility to accommodate a full range of potential future needs; such as shared parking, lifelong learning considerations, evening hour operations, other unique needs, etc.;*
- *Should provide safe and sufficient drop off locations, off street parking and loading, access/egress points;*
- *Should encourage the sharing of facility infrastructure, in the CKC concept, amongst potential partners, in order to maximize efficiencies of land, resources and services; this could include shared facilities between education providers or other 'MGA compatible' partners; or involve a wider range of partners on adjacent non reserve lands;*
- *Free-standing schools, or multi-use schools with CKC partners, shall strive to enhance a community focal point and strong sense of place; and contribute to a safe and healthy community which promotes fundamentals of 'smart choice' such as options, vitality, viability and access. They shall comply with CPTED principles and consider innovative design formats, including multi-level buildings to maximize land efficiency.*

Land Use Planning Processes/Tools

- *City - Municipal Development Plan, Structure Plans, Integrated Services Strategy;*
  Zoning Bylaw, Urban Services Zone (US) provides sufficient flexibility for the development of schools and an appropriate range of uses / partners, and flexibility also in built form / design options, while the Direct Control (DC2) Zone may at times be desirable to ensure all issues addressed where unique circumstances arise with the scale / use of development.
- *Province - The Municipal Government Act (MGA) regulates the use of Reserve land for park, recreation and school purposes. Includes a remedy to discharge reserve, where CKC may conflict with the MGA.*
- *Partnerships - Provisions of the Joint Use Agreement will provide a framework for ongoing operations and linkages with abutting parkland and community league facilities. Additional private agreements may also be required, dependent upon the nature of the partnership.*

4.0 Recommended Follow-up Activities

The Administration is recommending to City Council that the Future School Sites Study report be endorsed as the FSSS Model for the provision of school sites in future communities. Follow-up activities are outlined in the Planning and Development report to Council and include items such as revising Structure Plans terms of reference and include the requirement for preparation of a *School /CKC Needs Assessment*. Included also is direction to ensure awareness to plan proponents/stakeholders. In addition, outdated student generation and forecasting figures will be updated to reflect current demographic realities. Furthermore, bi-annual monitoring of the Model is proposed to ensure currency; any major changes would come back to City Council.

Also, it is proposed that the Department review the potential application of the Model to the portion of the City where there are approved plans with designated future school sites, or assembled vacant sites, or under-utilized built sites; and report back on the implications.

Finally, the Planning and Development Department will consider any report and recommendations from the 'Alberta Infrastructure Symposium on Schools', currently in progress, and if deemed necessary, prepare a report back on any significant implications.

5.0 Summary

The Future School Sites Model is considered to be a significant step in the City Administration's responsibilities for school site land use planning.

The Model has been developed in a manner that is consistent with the existing provincial and civic policy framework. Future school sites will continue to be assembled through the Reserve provisions of the Alberta Municipal Government Act. No changes are required to any municipal or provincial legislation, although the proposed strategy is flexible and can accommodate legislative changes. Ongoing activities by Working Committee members continue and add value in their efforts to improve delivery of service.

The Model will act as a flexible framework for the provision of school sites in future communities, serving as a useful tool articulating, to the benefit of all involved, a strategy for development of schools / CKCs. The Model does not force partnerships, but rather, creates a heightened awareness of such opportunities along with an environment within which CKCs can occur.

Finally, this Model is viewed as a positive step for all participants in efforts to provide school sites at an optimum location and in a timely manner that best meets the changing needs of the community. In so doing, the role of the school site as a community focal point will be enhanced.

The following illustrates an overview of this project.

Future School Sites Study (FSSS) - Project Overview

FINDINGS

☑ 1. "Joint Use" of School and Parks Sites

☑ 2. "Community Knowledge Campus" (CKC) Focus

☑ 3. Shift from Neighbourhood to Community Level School Sites

TWO PART MODEL

VISION

Part One: Conceptual Model

- Neighbourhood
- Community
- District

Part Two: Land Use Planning Tools / Guidelines

- 1. School / CKC Needs Assessment
- 2. Off Site Guidelines
- 3. On Site Guidelines
- 4. Planning Tools

FSSS VISION

School / CKC Needs Assessment - Key Component

Future School Sites Study