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Corporate Services

**REPORT TO THE ELECTORAL AREA SERVICES COMMITTEE
MEETING OF WEDNESDAY, 07 NOVEMBER 2007**

SUBJECT **Gulf Islands School District plan for School Community Connections Program Application**

PURPOSE/ISSUE

The purpose of this report is to request CRD Board support for the Gulf Islands School District application for a School Community Connections Program grant application.

In a letter dated September 26, 2007 the Superintendent of School District No. 64 (Gulf Islands), Mr. Jeff Hopkins, has requested the support of the CRD in their application for a grant of up to \$40,000 for the planning of a proposed use of a new or existing school asset for broader community use.

BACKGROUND

The School Community Connections Program is a funding program jointly managed by the Union of BC Municipalities and the BC School Trustees Association on behalf of the BC Ministry of Education. The focus of the program is to make greater utilization of school facilities for broader community purposes. The funding was publicly announced in April, 2005.

The program objectives are:

- To make best use of underutilized facilities (assets);
- To reduce the costs of delivering community programs; and
- To develop prototypes that can be used to promote further school-community connections.

Each BC school board with its local government partner is eligible for funding under the program. School boards will take the lead in selecting the local government partner to carry out projects. All applications must be made jointly by school boards and local governments, supported by council and board resolutions.

The attached Program and Application Guide outlines the eligible applicants, eligible projects and eligible project costs. The program is divided into three steps. School District No. 64 is proceeding with Step II where 75% of the approved grant amount is forwarded upon approval of the project. A statement from the local government Chief Financial Officer or School Board Secretary Treasurer verifying the total cost of the project is also required.

Schedule B to the program sets out the Terms and Conditions which must be agreed to by the local government and school board and will form part of the funding agreement. The first term clearly sets out that, as the applicants, school boards and local governments are jointly responsible for receipt of funds and application and reporting functions, even when other agencies have been delegated responsibility for undertaking the project. Also, the terms state that any cost overages are the responsibility of the school board and local government partner.

The project for which School District No. 64 is seeking funding is for planning for a simple residential dormitory with simple kitchen and indoor workspace for the Saturna Ecological

Education Centre. The Centre is part of the regular school system but is different in that it fosters relationships and opportunities within the school, beyond the school and the greater community of Saturna Island.

ALTERNATIVES

- 1) That the Board support the application of School District No. 64 for a School Community Connections Program grant application to develop the connection with the community and the Saturna Ecological Education Centre. Step I has already been achieved and Step II would be a positive move for the school and the community.
- 2) That the Board not support the application of School District No. 64. There is no direct administrative or financial relationship between School District No. 64 and the CRD and the terms of reference state that there is joint responsibility for the undertaking of any project.

FINANCIAL IMPLICATIONS


The letter from School District No. 64 states that the School District will bear all costs related to the project. Schedule B, "Terms and Conditions" requires joint responsibility for the receipt of funds and for any cost overages on the project.

SUMMARY/CONCLUSIONS

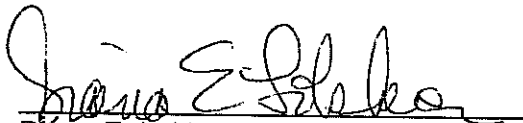
School District No. 64 (S.D.) is requesting the support of the CRD Board as its local government partner in applying for funding from the School Community Connections Program. This grant program is different from others that the Board has supported in that the terms and conditions not only make the local government partner jointly responsible for the receipt of funds and reporting but also for any cost overages on the project. The CRD expects to have a signed agreement from the S.D. wherein the S.D. will reimburse the CRD for any costs attributable to the CRD under this grant program. The application deadline for this program is December 1, 2007.

RECOMMENDATION(S)

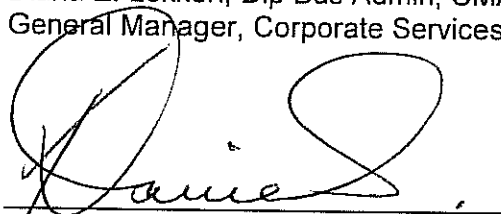
That the CRD Board agree to support the Gulf Islands School District's application for a School Community Connections Program grant.



Rita M. Estock, Dip Bus Admin, FCGA
Senior Manager, Financial Services Division

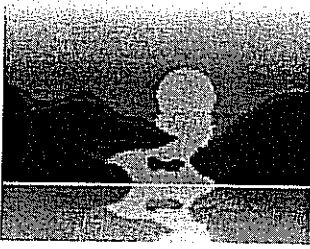


Diana E. Lokken, Dip Bus Admin, CMA
General Manager, Corporate Services



C.A.O. Concurrence

COMMENTS:



SCHOOL DISTRICT #64 (GULF ISLANDS)
112 RAINBOW ROAD
SALT SPRING ISLAND, BC
V8L 2L3

PHONE: 250-537-5548

October 26, 2007

Rita Estock
Senior Manager, Financial Services
Capital Regional District
625 Fisgard Street
Victoria, BC V8W 1R7

Dear Ms. Estock,

Further to my letter of September 26 regarding our request for the CRD to support us in our bid for a School Community Connections Program, I am writing now to better clarify the level of financial risk assumed by the CRD by agreeing to work with us.

Although the terms of the grant program normally make the local government partner jointly responsible for the receipt of funds, reporting, and any cost overages, the School District agrees to bear the entire financial burden, recognizing that the project is essentially under our management. In addition, to further protect the CRD if it supports us in this venture, the School District agrees to reimburse the CRD for any costs that could potentially be attributed to the CRD under the program terms.

Thank you for considering your participation in this important opportunity.

Sincerely,

Jeff Hopkins,
Superintendent, SD 64 (Gulf Islands)



SCHOOL DISTRICT #64 (GULF ISLANDS)
112 RAINBOW ROAD
SALT SPRING ISLAND, BC
V8J 2J3

PHONE: 250-537-5548

September 26, 2007

Rita Estock
Senior Manager, Financial Services
Capital Regional District
625 Fisgard Street
Victoria, BC V8W 1R7

Dear Ms. Estock,

I am writing you on the advice of Susan DeGryp with whom I met several days ago to discuss our plans for a School Community Connections Program application. The Gulf Islands School District is hoping to now move from Step 1 (Making a Connection) to Step 2 (Developing the Connection), as laid out in the terms of the grant application process.

The project for which we are seeking funding through this program is situated on Saturna Island, where we have recently started the Saturna Ecological Education Centre, or SEEC (see www.seec64.ca for more information). The Centre is part of our regular school system, but is different in that it truly blurs the lines between community and school, fostering relationships and opportunities within the school, beyond the school, and between the school and the greater community of Saturna Island.

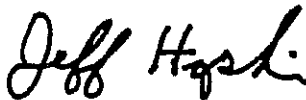
In order to fulfill our vision more completely, we hope to work with the CRD, our municipal partner, to develop plans that would enhance the facilities we are using for the centre in a way that would make our school-community program stronger, and that would also offer a focal point for potential related benefit for the greater community on the island. Specifically, a simple residential dormitory with simple kitchen and indoor

workspace, flexible enough to be useful to SEEC and to other community members on Saturna, is what we are planning. This vision will, of course, evolve as we gather input from community stakeholders and possibly the CRD itself.

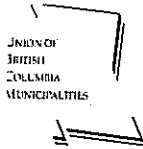
As Step 2 of the School Community Connections Program requires a letter of intent from both of us (the CRD and the School District) stating that we agree to plan together toward fulfilling this project, I am asking for a letter of support from you. There is no financial obligation on the part of the CRD, and the School District will bear all costs related to any planning activities as well. Susan DeGryp shared her enthusiasm for the project and suggested I write you to have this item shared with the Board for approval. Our deadline for application to Step 2 is December 1, 2007.

Please also see the link at <http://www.schoolconnections.ca/index.php> for a brief outline of the Program, as I am sure there will be some questions from those not already familiar with it. If you have any questions that are not answered in that way, please feel free to call me at 250-537-5548 or e-mail me at jhopkins@sd64.bc.ca and I would be glad to discuss this further.

Sincerely,

A handwritten signature in black ink that reads "Jeff Hopkins". The signature is written in a cursive, flowing style.

Jeff Hopkins,
Superintendent, SD 64 (Gulf Islands)



SCHOOL COMMUNITY CONNECTIONS Program and Application Guide



Contents

1. Introduction
2. Eligible Applicants
3. Eligible Projects
4. Eligible Costs
5. Selection Process
6. Payments
7. Policies and Procedures

1. Introduction

The Program and Application Guide lays out the purpose of the School Community Connections Program and describes the application process.

1.1 Purpose and Objectives

The School Community Connections Program is a funding program jointly managed by the Union of BC Municipalities and the BC School Trustees Association on behalf of the B.C. Ministry of Education. The program will provide \$10 million to school boards and their designated local government partners, to make greater utilization of school facilities for broader community purposes. The program will promote sustainable and innovative collaboration between school boards and local governments by providing joint funding in an equitable and transparent manner.

The Premier publicly announced the funding on April 2, 2005, stating:

We need to make better use of our school spaces so they benefit B.C. communities. The School Community Connections program will help school boards and local governments revitalize schools as centres for community learning and activity.

Program Objectives:

- To encourage and facilitate the co-location of services for students, their families and the larger community within school facilities;
- To make greater utilization of available or new school facilities; and
- To encourage collaborative, long-term facilities planning that takes into account the needs of the community as a whole.

1.2 Program Components

The program will be divided into three funding components, which should run consecutively for each *Connections* initiative. In select circumstances where comparable work for one of the program steps has already been undertaken by a school board /local government partnership, the preceding step may be bypassed, upon the approval of the program coordinator and demonstration that measures equal to the *Connections* requirements were undertaken.

Step I: "Making the Connection"

PURPOSE: To assist school boards and local governments to make initial contact, in order to identify and assess the viability of embarking on a joint initiative involving the use of school facilities for broader community use. School boards and local governments will jointly review the program materials, assign a project team, and assign roles and responsibilities for developing a *Connections* project.

FUNDING: Up to \$5,000 per potential *Connections* partnership. Funds will be managed jointly between school boards and local governments.

Step II: "Developing the Connection"

PURPOSE: To support the planning of a proposed use of a new or existing school asset for broader community use.

FUNDING: Up to \$40,000 per *Connections* partnership (one per school district). Funds will cover planning costs associated with assessing the type of program(s) to be delivered, the most efficient use of facilities, and other planning costs associated with the project.

Step III: "Completing the Connection"

PURPOSE: To support the implementation of *Connections* projects, by providing highly leveraged funding for start-up costs, including minor capital costs.

FUNDING: Up to \$125,000 per *Connections* partnership (one per school district). Funding will provide up to 25% of capital and/or other costs to implement each project. The remaining 75% of project funds must come from local governments, school boards, or other stakeholders.

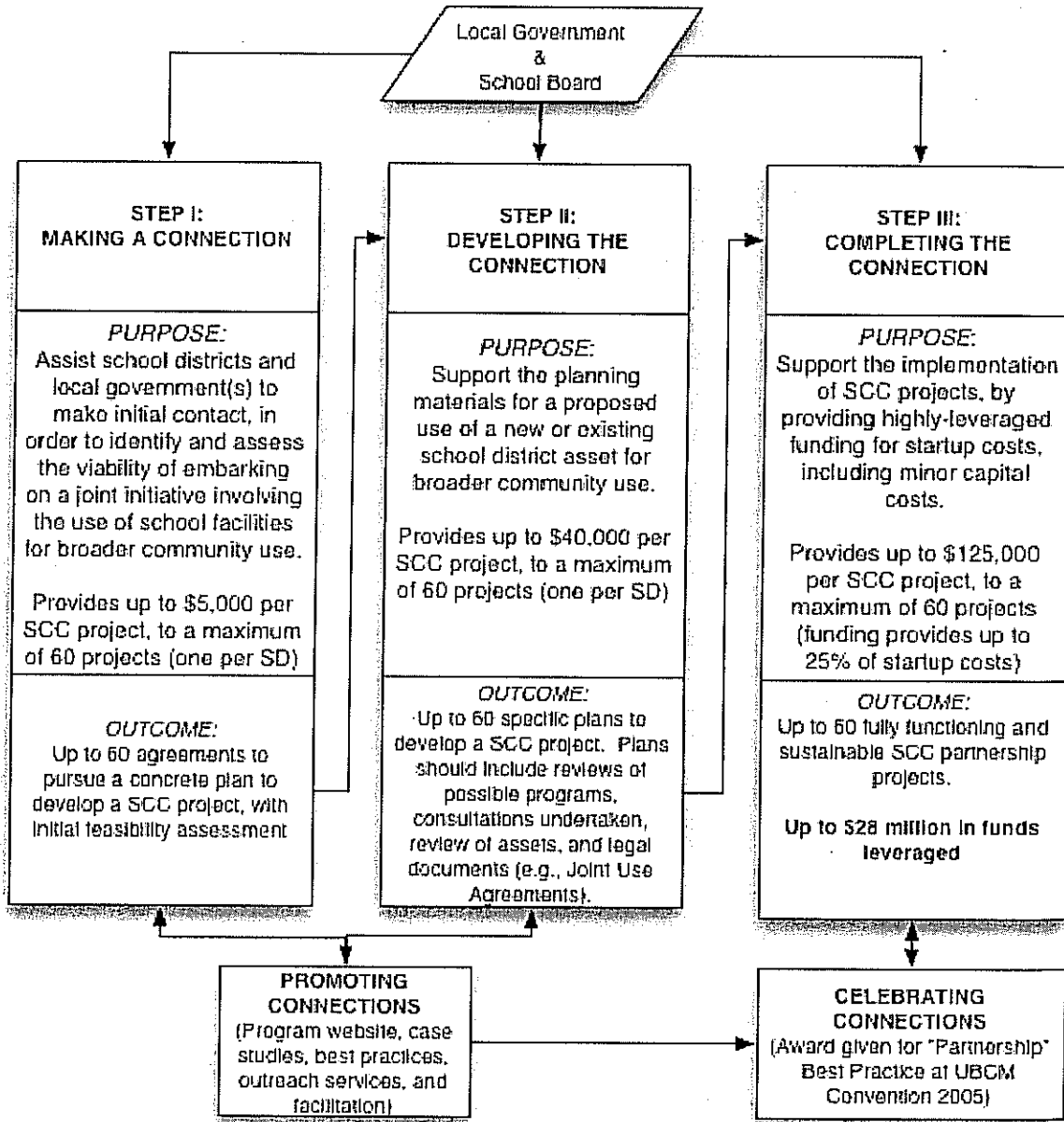
The following page provides a conceptual model of the School Community Connections Program. The specific procedural and documentation requirements for each step of the program can be found in *Schedule A*.

CONCEPTUAL MODEL SCHOOL COMMUNITY CONNECTIONS PROGRAM

Program Objectives:

- To make best use of underutilized facilities (assets);
- To reduce the costs of delivering community programs; and
- To develop prototypes that can be used to promote further school-community connections.

THREE CORE PROGRAM FUNDING STEPS
NOTE: EACH STEP CAN BE LINKED TO PRIOR STEPS, OR CAN STAND ALONE



2. Eligible Applicants

Each British Columbia school board with its local government partner(s) is eligible for funding under this program, including the Conseil Scolaire Francophone. School boards will take the lead in selecting the appropriate local government partner to carry out projects. Multiple local government partnerships should also be considered. Local governments are encouraged to approach the school board in their regions with suggestions of potential partnership programs to be promoted.

All applications must be made jointly by school boards and local governments, supported by council and board resolutions.

3. Eligible Projects

Eligible *Connections* projects are those that support the program objectives, including but not limited to:

- Renovating and/or re-allocating indoor classroom facilities for non-traditional school programming, such as early childhood development, daycare, seniors programming, etc.;
- Expanding and/or enhancing indoor gym facilities for community recreation use;
- Expanding and/or enhancing outdoor fields and sports facilities for community recreation use; and
- Expanding and/or or enhancing special equipment classrooms and resources, such as woodwork and metalwork shops, home economics facilities, music facilities, kitchens, cafeterias, swimming pools, etc., for broader community use.

Ineligible projects are those that do not directly support the program objectives, including but not limited to:

- Operational and staffing costs for projects beyond startup;
- Costs for existing projects and/or services already being delivered; or
- School programming for courses being taught as a part of the school curriculum.

4. Eligible Project Costs

Eligible costs are those costs that are directly and reasonably incurred in the development or implementation of each step of the program. The eligible and ineligible costs associated with each step of the program are noted below.

Step I – “Making the Connection”

Eligible Costs:

- Any costs associated with scheduling, conducting and documenting meetings between local governments and school boards; and
- Costs (including staffing) for drafting preliminary agreements.

Ineligible Costs:

- Any costs associated with meetings between local governments, school boards, and other potential partners prior to October 1, 2005; and
- Costs associated with meetings not related to promoting a new *Connections* initiative.

Step II – “Developing the Connection”

Eligible Costs

Eligible costs are those costs associated with:

- Inventory and evaluation of physical assets (school facilities) to identify those that will not be required solely for educational purposes for the foreseeable future (e.g., three to five years);
- Consultations with potential stakeholder and user groups of facilities, including broader public consultations with affected neighbourhoods;
- Research and consulting fees for developing plans;
- Legal research and documentation (e.g., Terms of Use Agreements, MOUs, liability coverage, etc.);
- *Preliminary* assessments and other feasibility studies (e.g., engineering, environmental, etc.); and
- Conducting meetings with the appointed advisory body (e.g., steering committee / project team).

Ineligible Costs

Ineligible costs are those costs associated with:

- Capital costs for construction and/or renovation of facilities;
- Regular operation of *Connections* projects (i.e., staffing); and
- Projects completed prior to October 1, 2005.

Step III: “Completing the Connection”

Eligible Costs

Eligible costs are those costs associated with:

- Additional costs associated with planning remaining from *Step II* (legal, site assessment, etc.);
- Site planning costs (environmental, engineering, construction, etc.);
- Building materials;
- Contractor / staff costs associated with planning and/or construction; and
- Any other costs associated with the physical construction and/or renovation of facilities.

Ineligible Costs

Ineligible costs are those costs associated with:

- Costs for planning and/or construction completed prior to October 1, 2005;
- Operational costs beyond initial project start-up – each project must be self-financing for its ongoing operations, including incremental costs associated with upkeep and maintenance of facilities;
- Any costs associated with normal programming of schools; and
- Any costs associated with the planning, enhancing, or expanding of facilities that will not be made available to the broader community.

5. Selection Process

5.1 Screening Criteria

All applications must meet the following criteria:

- Application must be submitted by "eligible applicants".
- Application must be for an "eligible project".
- Application must be complete and include the information outlined in *Section 7*.
- Application should demonstrate clear and measurable outcomes.

6. Payments, Records and Accounts for Approved Projects

6.1 Payments

The program coordinator will inform successful applicants by letter. For *Step I*, the full amount of \$5,000 will be forwarded upon approval of the project. For *Step II* and *Step III*, 75% of the approved grant amount will be forwarded upon approval. The balance will be paid on satisfactory completion of the project (or the project component to which the funding was applied) and the receipt of a satisfactory final report and financial summary. A progress report will be required 12 months after funding has been issued if the project is not complete.

A report on project achievements must be completed before final payment, and must demonstrate that the funding was used to enhance or expand the use of school facilities for broader community use. The details of the report are described in *Schedule A*.

A statement from the local government Chief Financial Officer or School Board Secretary Treasurer verifying the total cost of the project is also required. Where applicable, this statement should also identify other contributions such as "in-kind", matching funding, and other revenue sources required to complete the project. For *Step III*, the statement must demonstrate the source of the other 75% of funds leveraged toward the project. These funds cannot be derived from Ministry of Education funding. The balance of funding will be paid on receipt of a satisfactory report.

The program coordinator may require applicants to provide details of the types and amounts of expenses incurred.

6.2 Changes or Variations to an Approved Project

The appointed project team needs to advise, in writing, of any variation from the approved project (e.g. changes to timelines and deliverables). The program coordinator's approval may be required for such changes.

6.3 Accounting Records

Chief Financial Officers and/or Secretary Treasurers must maintain acceptable accounting records that clearly disclose the nature and amounts of the different items of cost pertaining to the program activities. Records must also attest that funding was for new activities and was not used to fund a previously existing program.

7. Policies and Procedures

7.1 Policies and Procedures Checklist

See *Schedule A*.

7.2 Where to Apply

Union of BC Municipalities/Municipal House
Local Government Program Services
545 Superior Street
Victoria, BC V8V 1X4

7.3 Contact Information

Program Coordinator: Sue Clark, Executive Coordinator
Phone: 250-356-5134
Fax: 250-356-5119
E-mail: sclark@civicnet.bc.ca

7.4 Application Contents

7.4(a) – Step I

Applications for *Step I* must indicate the following:

1. Intent to pursue a *Connections* initiative with a local government partner;
2. Name(s) of the local government(s) to be contacted; and
3. Contact information for the school district representative coordinator for the project.

7.4(b) – Step II

Applications for *Step II* must include the following components:

1. Description of the project(s) to be undertaken;
2. Stakeholder groups to be consulted to assist in determining high-needs program areas;
3. School board assets to be reviewed. The school board must submit a statement indicating that, to the best of its abilities at predicting the future demand for facilities, sites identified for *Connections* funding will not be needed for normal educational programming in the next 3-5 years;
4. How the concerns of affected neighbourhoods will be addressed (e.g., public consultations);
5. Planning activities to be undertaken, including the drafting of legal and technical documents, where applicable;
6. Evaluation procedures for the initiative. Evaluation criteria for Phase II include:
 - a. Expected impact on users;

- b. Efficiency of facilities renovation or construction (e.g., facilities preparation costs versus potential amount of new service to be provided); and
 - c. Perceived impact on neighbourhood (e.g., potential objections from neighbours, positive impacts on users).
7. General cost estimates for the activities to be funded;
 8. The date when a final report with accompanying financial statements will be submitted.
 9. A resolution from school board and local government council/board approving the application and accepting the terms and conditions of the program as set out in *Schedule B*.
 10. Contact information for the staff member(s) responsible for the application from each local government and school board.

7.4(c) – Step III

Applications for Step III must include the following:

1. Description of the project(s) to be undertaken, including:
 - a. Estimated cost of materials;
 - b. Estimated cost of labour (including contractors);
 - c. Estimated cost for any site-specific legal and/or technical assessments.
2. Funds leveraged from other partners (note: at least 75% of the project funds for Phase III must come from local governments, school boards, or other stakeholders);
3. Any start-up operational costs to be covered;
4. The date when a final report with accompanying financial statements will be submitted;
5. A resolution from school board and local government council/board approving the application and accepting the terms and conditions of the program as set out in *Schedule B*; and
6. Contact information for the staff member(s) responsible for the application from each local government and school board.

7.5 When to Apply

In order to accommodate school boards and local governments that may already have partnership initiatives underway, funding will be made available for all steps of the program at the same time.

The first intake of applications for all steps of the program will commence on October 1, 2005 and the deadline is April 1, 2007. Applications will be reviewed and decisions made within 90 days of submission.

Attachments:

Schedule A. Program Policies and Procedures Checklist

Schedule B. Terms and Conditions

Other sources of information provided on the program website:

- Communications materials related to the program;

- Links and materials showcasing existing school board / local government collaboration; and
- Updated information showcasing selected *Connections* projects as they are approved.

SCHEDULE A:

SCHOOL COMMUNITY CONNECTIONS PROGRAM "Policies and Procedures Checklist"

The following steps are required in order to secure funding under the School Community Connections Program. Note: the final 25% of funding will be withheld until all of these steps have been completed, with the exception of *Step I*.

STEP I: "Making a Connection"

- School board undertakes to identify potential project(s).
- School board informs program coordinator, in writing, of intention to pursue *Connections* project, receives funds.
- School board initiates contact with local government(s).
- School board reviews possible local government partners and preliminary expressions of interests from local government(s)
- School board selects local government partner(s).
- School board and local government partner(s) hold meeting, appoint a planning team to undertake *Step II* planning, review program materials, and assign roles and responsibilities.

STEP II: "Developing the Connection"

Required:

- Step I* or equivalent process undertaken to establish intention to promote a *Connections* partnership project according to terms set out in this Program Guide.
- Application submitted for funds (see Section 7.4(b) for requirements).
- Project team reviews and documents possible site(s) that will not be needed solely for normal educational purposes, including an explanation of why the site will not be needed for educational purposes in the next 3-5 years.
- Project team consults with stakeholder groups to identify potential program(s) and operational funding.
- Potential programs reviewed against possible facilities, scenarios developed and scored according to criteria developed by the program planning team. Criteria should include:
 - Expected impact on users;
 - Efficiency of facilities renovation or construction (i.e., facilities preparation costs versus potential amount of new service to be provided); and
 - Perceived impact on neighbourhood, including potential objections from neighbours.

- Planning team drafts (or contracts-out for drafting of) *Joint Use Agreement* for use of facilities – see *Sample Joint Use Agreement* on School Community Connections Program websites.
- Planning team recommends a partnership project to Council/Board.
- Council/Board vote on proposal, including *Terms of Use Agreement*.

Optional:

- Site appraisals (environmental and/or engineering studies).
- Drafting of other technical / legal agreements.
- Other general or site-specific planning activities.

STEP III: "Completing the Connection"

- School board and local government complete *Step II* or equivalent (with supporting documentation demonstrating completion of all required components for *Step II*).
- Planning team assesses total startup costs, including capital costs, materials, wages, and contractors' fees.
- Planning team submits application for funds (see Section 7.4(c) for application requirements).
- Project undertaken.
- Final report submitted to program coordinator after completion of project, including:
 - o Summary of work undertaken, including costs and timelines;
 - o Services to be provided, including potential number of users and hours facilities are available for community use; and
 - o Expected community benefits from project.

SCHEDULE B

SCHOOL COMMUNITY CONNECTIONS PROGRAM
"Terms and Conditions"

In applying for the School Community Connections grant jointly managed by UBCM and the BCSTA, the following terms and conditions must be agreed to by the local government and school board, and will form part of the funding agreement.

1. That, as the applicants, school boards and local governments are jointly responsible for receipt of funds and application and reporting functions, even when other agencies have been delegated responsibility for undertaking the project(s).
2. That all projects funded under this program must support the program goals of expanding and/or enhancing the use of school facilities for broader community use.
3. That funding will not be used to duplicate or subsidize existing programs.
4. That, where a funded project is not completed within a 12 month time frame, a progress report including funds expended to date, will be provided to the Program Coordinator.
5. That a final report detailing what was achieved will be prepared and submitted to the Program Coordinator on project completion.
6. That any unused funds will be returned to the program coordinator on expiry of the program.
7. That cost overages are the responsibility of the school board and local government partner(s).