

St. Albert School Site Allocation Memorandum of Understanding Review

June 2017





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Section One

Introduction and Methodology

The allocation of municipally owned sites for new school development in the City of St. Albert occurs via an administrative committee (the School Site Allocation Committee) under the terms and conditions outlined in the School Site Allocation Memorandum of Understanding (MOU). The MOU and the Committee are intended to take school sites, already identified by the City of St. Albert, and assign them to the most appropriate and approved school development project.

The intent of this review process (as presented herein) is to review and assess the effectiveness and pertinence of the School Site Allocation Memorandum of Understanding and suggest improvements—if applicable. This review has been completed by analyzing the existing MOU document (see Appendix D). As well personal interviews and group meetings with key stakeholders were conducted along with the gathering of input from key stakeholders via a web based survey tool. Finally, a review of how other jurisdictions address the allocation of school sites to multiple school authorities was conducted using web searches and telephone interviews (see Appendix C).

The results of this review are meant to influence the future relationship of the parties and improve the school site allocation process in the City of St. Albert. Although there are a number of suggestions made based on the research conducted, none of these suggestions are binding and will ultimately be subject to stakeholder approval.

The initial identification and approval of school sites is conducted via City of St. Albert staff, through the ASP process, and formally approved by City Council. School sites are provided by the City via the allocation of Municipal Reserve dedicated by a developer to the City under the provisions outlined in the Municipal Government Act. For more information please refer to the administrative report entitled “Process Review for the Recommendation of School Sites” (January, 2015)

The process to have a school built in Alberta requires significant input from three major bodies. While it is the responsibility of the school jurisdictions to identify requirements for new school infrastructure, Alberta municipalities are looked upon to provide sites for new school developments. In addition, the Province of Alberta Ministry of Education approves and funds the capital construction of new schools.

Section Two

Memorandum of Understanding Overview

The City of St. Albert School Site Allocation Memorandum of Understanding is an agreement between the parties identified below.

1. The City of St. Albert
2. The Greater St. Albert Roman Catholic Separate School District No.734
3. The Regional Authority of the Greater North Central Francophone Education Region No.2
4. St. Albert Public School District No.5565

The current version of the MOU has been in effect since 2015; the agreement has been in place since 1997.

The three school jurisdictions operate schools within the boundaries of the City of St. Albert. The Regional Authority of the Greater North Central Francophone Education Region No. 2 also oversees school operations in areas beyond the City of St. Albert boundaries while the other two jurisdictions operate exclusively within the City boundaries.

The MOU has three main components. It includes six philosophical pillars to guide the actions of the parties and articulate the overarching spirit and intent of the MOU and the relationship. It also includes fourteen principles that specify the actions of each party and the collective group in enacting the MOU and allocating school sites. Finally it provides an overview of the composition and responsibilities of the Site Allocation Committee as it relates to the allocation of school sites via the pillars and principles outlined in the MOU.

MOU Principles: Summarized

1. The City will identify at least one school site in each new Area Structure Plan.
2. The City will be the custodian of reserve land.
3. The School Boards will be responsible for articulating and justifying the need for land in a timely and understandable fashion.
4. The City shall plan for a sufficient number of school sites to meet the needs of School Boards.
5. The City shall produce, with the involvement of the School Boards, an annual School Site Allocation Report which will include a review of potential school/park sites.
6. No pre-allocation of school sites will occur.

7. No school site will be identified as being available to only one Board.
8. If construction of a new school with land allocated to it does not commence within 2 years of allocation, the site will be available for reallocation.
9. Allocation of school sites will occur only when the land is zoned and registered appropriately for school development and Board identifies a need for the site, has approval of funding, and has applied for a development permit and submitted building plans.
10. The City will transfer only the school portion of the site to the respective School Board.
11. All costs associated with transferring title shall be borne by the City.
12. In the event that there are competing claims for a potential school site, the competing School Boards shall mediate the situation at their own cost.
13. If a Board no longer requires an allocated site, all parties shall determine whether or not any other partner requires the site.
14. If a Board no longer requires an allocated site and no other Board requires the site, the site will be transferred back to the City, unless the Board is unable to do so due to other legislative requirements.

As per the MOU, the Site Allocation Committee is chaired by the City's representative and includes the City Manager and the Superintendent of each School Board. In summary, the Committee's role is to:

- Meet at least once a year to review facility plans of each party.
- Determine how school sites might be allocated given available Reserve Lands.
- Review proposed new Area Structure Plans (or amendments to existing).
- Contribute to the completion of the annual School Site Allocation Report.
- Allocate sites between School Boards.

Section Three

Stakeholder Input

Stakeholders representing each of the four partner organizations were either personally interviewed (members of City Council were met with individually and in person) or received a group presentation (see Appendix B; School Boards from each jurisdiction were met with in a group setting) followed by a chance to individually complete an online web survey. Face to face stakeholder engagement occurred during the month of December 2016 and the web survey was open until late January 2017. Stakeholders were asked to answer the questions outlined in the Stakeholder questionnaire found in Appendix A.

Overall effectiveness of the MOU.

When asked if stakeholders felt that the current MOU was effective in ensuring that appropriate land was in place for future school sites, the majority indicated that it is very ineffective. Although this does speak to a possible lack of communication with the partnership agreement, the overall amount of available land is more a function of the Area Structure Plan process, which is outside the scope of the MOU itself. Those that felt the current relationship is ineffective in ensuring lands are available for future school sites did not feel the issue was with the wording of the agreement nor the “buy-in” of partners (only one stakeholder thought that partner buy-in was an issue) instead the issue was the lack of overall site availability.

Relevancy of the philosophical pillars.

The relevancy of the six existing MOU philosophical pillars was also tested with stakeholders. The majority of stakeholders felt that the existing pillars were relevant. That said, requests to further articulate the pillars in the agreement and comments regarding partners not always demonstrating the intent of the pillars in their actions were made.

Other comments included the following:

- Wording of the “strategic allocation” pillar could be enhanced to reflect “allocation based on overall enrollment.”
- Strengthening the “consultation and communication” pillar,
- Adding three new pillars - the first to exclude political influence from the site allocation process, the second to be a philosophical statement around constitutional rights, and the third to further public interest.

Agreement with principles.

In general, the majority of stakeholders were in agreement with the 14 principles outlined in the current MOU. The following comments were made:

- In reference to principle “a”: the limitation of at least one site may not be enough; site appropriateness in terms of size, access, etc. should also be articulated (2/4)
- In reference to principle “c”: some felt that the School Boards should not be responsible for articulating need in a timely and appropriate fashion as the School Boards are responsible to articulate need to the Province which provides formal approval after a site readiness checklist is completed (2/4)
- In reference to principle “f”: school sites should be pre-allocated to a certain School Board in some instances to meet site readiness protocols of the Provincial government (1/4)¹
- In reference to principle “g”: the two year timeline may not be long enough under certain circumstances (4/4)
- In reference to principle “h”: the prerequisites for actual site transfer from the City to the School Boards are not achievable as the Province requires land in place before funding approval (2/4)
- In reference to principle “i”: the transfer of only the immediate school portion of the site is not ideal in its current form and should be expanded to include potential future growth and building accessibility (1/4)

When asked about potential additional principles, the following comments were made.

- Site allocation should enable school jurisdictions to sustain their market share; providing sites for all jurisdictions in areas with student populations such as growing neighborhoods is ideal (1/4)
- Board Trustees and City Council will not be involved with the work of the committee (1/4)

¹ This comment was supported via a St. Albert Public School District Board of Trustees Motion March 9, 2016.

Agreement with composition and responsibilities of the Site Allocation Committee.

The majority of stakeholders felt that the responsibilities given to the Site Allocation Committee were appropriate (3/4). Furthermore, the majority of stakeholders felt that the composition of the Committee is also appropriate in terms of the number of committee members and the administrative nature of the committee (3/4). The potential of adding representation from the Province of Alberta to provide insight as to the school approval process was identified. As well, the imbalance on the committee of general public versus school-based interests was identified as an issue by some stakeholders as was the lack of formal committee voting protocols.

Agreement with the Site Allocation Committee having final approval in school site allocation.

The majority of stakeholders felt that the Committee should have final approval in school site allocation (3/4). That said, the concept of a “check and balance” or “appeal” system was mentioned by some stakeholders (2/4) to ensure that major issues can be avoided. The majority of stakeholders felt that the final site allocation decision should not require the formal approval of City Council (3/4).

If you could change one thing about the current MOU.

When asked to change one thing about the current MOU and relationship, the following answers were given.

- A mechanism must be put in place that assures access for all boards to be allocated sites in new growth areas.
- The relationship should ensure that school jurisdictions are allocated a site prior to a school project being awarded by the Province.
- The allocation of sites (number and geographic location) needs to consider overall student enrollment.

Other comments.

Finally, stakeholders were asked to provide final comments. Suggestions around improving the dispute resolution process, ensuring that public expectations are not set for specific sites to have specific types of schools prior to approval, and increasing the overall number of appropriate school sites were provided. Comments around the responsibility of providing sites for schools ideally being a provincial responsibility instead of a municipal responsibility were also made. The potential introduction of having a sunset clause on sites identified as future school sites was also mentioned.

Section Four

Other Practices

A review of how school sites are allocated in other jurisdictions was conducted to further complement the stakeholder input gathered. In total, eleven municipalities provided input throughout the month of January 2017. Input was gathered primarily through telephone conversations and email. Review of municipal websites was also conducted where necessary. Please refer to Appendix C for the list of questions asked and the responses from each municipality.

Of the 11 municipalities reviewed, 4 indicated they had two different School Boards operating within their boundaries while the other 7 indicated they had 3 or more.

Just over half (6) of the municipalities had a formal process in place to allocate sites to different School Boards while two did not and three were in the process of developing a formal process. Of the six who had a formal process in place, each had an agreement although two indicated that their agreements were “outdated”. Four of the municipalities had an organized group/body/committee in place to oversee school site allocation, while one was in the process of creating a committee. Six of the municipalities did not have a formal group in place and were not planning on having one in the future. **The majority of municipalities reviewed either have a formal agreement in place or are in the process of developing one. Although most see the need to have a process and agreement, only half (approximately) have a formal committee or group in place to oversee the process.**

When asked if municipal councillors had any say in the allocation of school sites, only one indicated Council was involved in the process while ten indicated there was no involvement from Council after the Area Structure Plan stage (at which point school sites are identified but not allocated). **The majority (10 of 11) of other municipalities do not involve municipal council in the school site allocation process.**

Municipalities were also asked if they had a sunset clause built in to the identification of municipal reserve for school lands should no schools be developed within a certain time period. **None of the municipalities reviewed had a sunset clause related to land identified as potential future school sites (as indicated during the Municipal Reserve dedication process).**

Interviewees were also asked to provide any other insights they had regarding the allocation of school sites in their specific municipality or beyond. These comments are summarized as follows:

Insights related to relationships, communication, and inclusion.

Note: the following are excerpts from discussions with other municipalities.

- Sit down right at the front end with ASP. Planning developer, School Boards, etc. so that no one feels left out of loop. City liaises with developers. Talk to boards about wants and needs.
- Great relationships are as important as a great framework.
- We need to formalize things because people, organizations and communities change. Let's make sure we have something that we can all agree upon and monitor. Way to track MR expense, supply and school needs on an annual base. We need to track the community and school trends. Competing all for the same dollar and piece of lands.

Municipalities Reviewed

1. Airdrie
2. Calgary
3. Camrose
4. Edmonton
5. Fort Saskatchewan
6. Grande Prairie
7. Leduc (City)
8. Lethbridge
9. Medicine Hat
10. Red Deer
11. Spruce Grove
12. Strathcona County

Insights related to the need for good information.

- Take a look at the 10%/opportunities/numbers/population growth. Where is the highest demand for the next school?
- Growth projections will have a big influence on which school has priority. Has the province allocated resources?

Insights related to the inter-relatedness of schools/parks/trails.

- Proximity to other sites and facilities; opportunities for schools to partner to provide better resources to other citizens; where are deferred sites that are big enough for schools; green space master plan.
- You cannot look at school sites by themselves. Integrated MR is required... City will take control of MR acquisition and disposition strategies. School sites will maximize the benefits.

Insights related to possible challenges with the allocation of school sites.

- Typically park sites are in use prior to the school being built; development impacts already built infrastructure.
- We have old school sites that have been assembled and ready for 10 – 15 years. They were planned based on the size of schools that the province was building at that time. Now schools are bigger and we have trouble fitting the building on the site.
- Site had to be serviced; developer had to pay; but the timeline was the School Board's not the developer's.
- The School Districts' perceptions seem to be that when a school site is identified on the plan, the site is ready for a school. That is not the case. When we look at a best place for the school in the Area Structure Plan, it may be 10 years away.

Insights related to important elements to successful relationships.

- Generally members are all higher level – GM/Commissioner level—need decision makers at table because that is where decisions are being made. Multi-departmental – Planning, Parks and Rec Commissioner, Superintendents from the School Boards.
- City will work with School Boards to determine site locations without assigning it to a particular board. At the end of the day, until there is an announcement from the Province, we will NOT know who will get the school.
- Uncertainty of when the schools will be built. The boards don't know when, or if, the school will be built, then there is a short turn around when it is funded.
- Agreement states that sites are not allocated to a particular board until provincial funding is approved. School must be built within 2 years. If it does not get built, the site comes back to us for review and possible re-allocation.
- Level of school is indicated as either K-9 or Grades 10- – 2.
- The developer will try to put the site where they think it works, not what the School Board needs. At least two accesses are needed. The developers want a great community, but their pro forma must work. They need a clear set of guidelines from the City to consider.

Section Five

Conclusions

The conclusions are based upon the review and assessment of the existing MOU, input received from stakeholders, review of the process in other municipalities, and the observations of the consulting team. These conclusions are outlined as observations related to the context, suggestions regarding the MOU and future of the relationship, and suggestions regarding items outside the scope of the MOU but related to it.

Observations related to the school site allocation context.

- Fundamentally and generally, there are two strategic interests represented in the MOU, those of the elementary and secondary education/students and those of the broader community (general public).
- School Boards are responsible for defining their needs for new infrastructure. Municipalities are relied on to provide land, while their MR requests to developers during the development/land dedication are governed by the Province. The Provincial government ultimately approves and funds development of new schools. As this system is not integrated, with limited cross-input from stakeholders into each aspect of school siting and development and there is no one body responsible for the entire process (needs assessment, capital fund approval, and siting) the potential for issues related to timing, site availability and appropriateness, and complete funding is high.
- The City of St. Albert is limited as to how much Municipal Reserve it can ask for during land development via the provision outlined in the Province of Alberta Municipal Government Act. Limitations regarding Municipal Reserve and competing interests for public land (parks and recreation, civic operations, schools, libraries, arts and culture, economic development, etc.) have forced, and will continue to force, the City to acquire additional public lands at a cost to local taxpayers.
- The Province of Alberta does not have a formal and consistent methodology related to the assessment of need for, approval, and siting of school infrastructure.
- St. Albert is a better community with appropriately provided school facilities. Under the current funding and approval system, the community will be better off if it is positioned and ready to accept any and all approved school projects.

Suggestions to the School Site Allocation Memorandum of Understanding and the Future of the Relationship between partners.

- Continue to have a formal Memorandum of Understanding (MOU) in place with each of the three school divisions (as well as any other that may materialize over time) to outline the roles, responsibilities, and parameters around the allocation of school sites.
- Continue to utilize a School Site Allocation Committee to steward the MOU and be responsible for the allocation of school sites.
- Adjust Committee representation to balance community and school interests (currently at a ratio of 1:3).
- Explore the possibility of adding Provincial representation to the Committee or other methods to incorporate consistent provincial input to the process.
- Articulate (briefly) the general strategic interests of each party in the MOU to create clarity, transparency, and consistency.
- Formalize the decision making process for the Committee (introduce voting rights).
- Include an Appeal Process for disputing the decisions of the Committee for anyone party to the agreement.
- Adjust the “Strategic Allocation” pillar to further articulate balance via proportionate enrollment and geographic access to all areas for all jurisdictions.
- Include a new pillar to reference the avoidance of “political influence” in Committee decision making.
- Include a new pillar to recognize and articulate the “strategic interests” of all partners.
- Adjust principle “c” to include the provision that each school division should outline future needs in a consistent fashion based on an agreed to template (outlining rationale for a new school, enrollment projections, likelihood of approval and when, etc.)
- Adjust principles “f”, “g”, and “h” to ensure that site readiness protocols of the Province for school approval can be met.
- Adjust principle “i” to enable school authorities to garner enough site capacity to accommodate future envelop expansion.

Suggestions outside the scope of the School Site Allocation Memorandum of Understanding but related to it.

- The City should develop and enforce internal protocols related to the identification of potential school sites at the Area Structure Plan level so as not to set market expectation regarding the type, size, or orientation of an actual school facility until formal approval and funding is in place.
- The City should involve the school authorities, via the School Site Allocation Committee, in the administrative review and comment of Area Structure Plans prior to Council approval.
- Collectively, School Boards should develop generic conceptual models for different types of schools (e.g. elementary, secondary, specialty, etc.) outlining generic and agreed to site size and servicing (adjacencies, access/egress, etc.) requirements to better assist the City in accepting Municipal Reserve Dedications and identifying public lands appropriate for future needed schools.
- All parties should advocate for adjustments to the overall school construction process to include site selection and acquisition as part of the school construction capital development and approval process.

The parties of the City of St. Albert School Site Allocation Memorandum of Understanding now have a basis from which to set the stage for school site allocation in the future. The suggestions made herein are just that, suggestions, it is incumbent upon the parties involved to discuss these, raise others, and adjust the relationship moving forward.

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St. Albert School Lands School Site Allocation Stakeholder Discussion Questions

December 2016



Please answer the following questions.

1. Please indicate how effective the current school site allocation memorandum of understanding (MOU) is at helping all partners (City and all 3 school boards) in ensuring appropriate land is available for future school sites?
☐ Very effective
☐ Somewhat effective
☐ Neutral
☐ Somewhat ineffective
☐ Very ineffective
2. If you have indicated the MOU is either somewhat or very ineffective, can you clarify why that is your opinion?
☐ The content and direction outlined in the MOU is incorrect and/or inappropriate
☐ The stakeholders involved are not bought into the relationship
☐ The stakeholders involved do not follow the principles and directions outlined in the MOU
☐ Other: _____

The following pillars are outlined and explained in the MOU.

- Accountability
- Collaboration
- Consultation and Communication
- Flexibility
- Openness
- Strategic Allocation

3. After reviewing the descriptions included in the MOU for each of these pillars, please indicate your level of agreement with each being foundational to a fruitful school site allocation relationship.

Pillar	This Pillar is Relevant	Not Sure	This Pillar is Irrelevant
Accountability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Collaboration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consultation and Communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Flexibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Openness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Strategic Allocation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Are there any pillars missing from the previous list that would add strength to the relationships between the partners involved? Please list them below.

5. The following statements summarize the principles outlined in the current MOU. For each of these 14 principles, please indicate your level of agreement. For more detail, please refer to the actual MOU document.

MOU Principle Summary Statement	Strongly Agree	Somewhat Agree	Unsure	Somewhat Disagree	Strongly Disagree
The City will identify at least one school site in each new Area Structure Plan.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The City will be the custodian of reserve land.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The school Boards will be responsible for articulating and justifying the need for land in a timely and understandable fashion.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The City shall plan for a sufficient number of school sites to meet the needs of school Boards.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The City shall produce, with the involvement of the school Boards, an annual School Site Allocation Report which will include a review of potential school/park sites.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No pre-allocation of school sites will occur.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No school site will be identified as being available to only one Board.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If construction of a new school with land allocated to it does not commence within two years of allocation, the site will be available for reallocation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MOU Principle Summary Statement	Strongly Agree	Somewhat Agree	Unsure	Somewhat Disagree	Strongly Disagree
Allocation of school sites will occur only when the land is zoned and registered appropriately for school development and Board identifies a need for the site, has approval of funding, and has applied for a development permit and submitted building plans.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The City will transfer only the school portion of the site to the respective school Board.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
All costs associated with transferring title shall be borne by the City.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In the event that there are competing claims for a potential school site, the competing school Boards shall mediate the situation at their own cost.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If a Board no longer requires an allocated site, all parties shall determine whether or not any other partner requires the site.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If a Board no longer requires an allocated site and no other Board requires the site, the site will be transferred back to the City, unless the Board is unable to do so due to other legislative requirements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. Are there any other principles you think should be added that would add strength to the relationships between all partners involved? Please list them below.

The current MOU is enacted by the Site Allocation Committee. The role of the Site Allocation Committee is to meet at least once a year to review facility plans of each party, determine how school sites might be allocated given available Reserve Lands, review proposed new Area Structure Plans (or amendments to existing), contribute to the completion of the annual School Site Allocation Report, and ultimately allocate sites between School Boards. The Committee is chaired by the City's representative and includes the City Manager and the Superintendent of each School Board.

- 7a. Do you agree with the responsibilities given to the Site Allocation Committee?

- ☐ Yes
☐ Unsure
☐ No

- 7b. Please provide your comments below.

8a. Do you agree with the composition of the Site Allocation Committee?

☐ Yes

☐ Unsure

☐ No

8b. Please provide your comments below.

9. Do you have any other comments to make regarding the Site Allocation Committee?

10a. The current MOU enables the Site Allocation Committee to have final approval in the allocation of school sites. Do you think this is appropriate?

☐ Yes

☐ Unsure

☐ No

10b. Please provide your comments below.

10c. Do you think that allocation of designated school sites to competing school authorities should be a political decision (should final allocation decisions require City Council approval)?

- ☐ Yes
☐ Unsure
☐ No

10d. Please provide your comments below.

11. If you could change one thing about the current agreement, what would you change?

12. Do you have any other comments to make regarding the allocation of school sites in the City of St. Albert?

13. What best describes your position:

- ☐ City Council
☐ City Administration
☐ School Board
☐ School Administration

Thank you for your time.

St. Albert School Site Allocation Memorandum of Understanding Review



Introductions

RC Strategies+PERC



The City of St. Albert



The Greater St. Albert Roman Catholic Separate
School District No.734



Greater St. Albert
Catholic Schools

The Regional Authority of the Greater North
Central Francophone Education Region No.2



St. Albert Public School District No.5565



Purpose

Review and assess the effectiveness and pertinence of the School Site Allocation Memorandum of Understanding and suggest improvements (if applicable)



Memorandum Overview

Six Pillars

- Accountability
- Collaboration
- Consultation and Communication
- Flexibility
- Openness
- Strategic Allocation



Memorandum Overview

Fourteen Principles **summarized*

1. The City will identify at least one school site in each new Area Structure Plan.
2. The City will be the custodian of reserve land.
3. The school Boards will be responsible for articulating and justifying the need for land in a timely and understandable fashion.



Memorandum Overview

Fourteen Principles

4. The City shall plan for a sufficient number of school sites to meet the needs of school Boards.
5. The City shall produce, with the involvement of the school Boards, an annual School Site Allocation Report which will include a review of potential school/park sites.
6. No pre-allocation of school sites will occur.



Memorandum Overview

Fourteen Principles

7. No school site will be identified as being available to only one Board.
8. If construction of a new school with land allocated to it does not commence within 2 years of allocation, the site will be available for reallocation.
9. Allocation of school sites will occur only when the land is zoned and registered appropriately for school development and Board identifies a need for the site, has approval of funding, and has applied for a development permit and submitted building plans.



Memorandum Overview

Fourteen Principles

10. The City will transfer only the school portion of the site to the respective school Board.
11. All costs associated with transferring title shall be borne by the City.
12. In the event that there are competing claims for a potential school site, the competing school Boards shall mediate the situation at their own cost.



Memorandum Overview

Fourteen Principles

13. If a Board no longer requires an allocated site, all parties shall determine whether or not any other partner requires the site.
14. If a Board no longer requires an allocated site and no other Board requires the site, the site will be transferred back to the City, unless the Board is unable to do so due to other legislative requirements.



Memorandum Overview

The Site Allocation Committee is chaired by the City's representative and includes the City Manager and the Superintendent of each School Board. The Committee role is to:

- Meet at least once a year to review facility plans of each party
- Determine how school sites might be allocated given available Reserve Lands
- Review proposed new Area Structure Plans (or amendments to existing)
- Contribute to the completion of the annual School Site Allocation Report
- Allocate site between School Boards.



Discussion Questions

How effective the current school site allocation memorandum of understanding (MOU) is at helping all partners (City and all 3 school boards) in allocating land available for future school sites? If it is not effective, why?



Discussion Questions

How relevant are the 6 Pillars? Are there any that are missing?

1. Accountability
2. Collaboration
3. Consultation and Communication
4. Flexibility
5. Openness
6. Strategic Allocation



Discussion Questions

How relevant are the 14 Principles?

Are there any aspects of the relationship that need to be further articulated (missing principles)?



Discussion Questions

Is the composition, responsibility, and authority of the Site Allocation Committee appropriate?

Should the Site Allocation Committee have final approval in the allocation of school sites?

Do you think that allocation of designated school sites to competing school authorities should be a political decision (should final allocation decisions require City Council approval)?

If you could change one thing about the current agreement, what would it be?

Other comments?



Next Steps and Timing

1. Gather and compile feedback from all stakeholders (December/January)
2. Conduct leading practices analysis (December/January)
3. Develop draft and final reports (February)



Feedback

Click here:

[Stakeholder Survey](#)

Please complete by December 16, 2016

Mike Roma, RC Strategies+PERC
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Appendix C: Other Practices Results

The following table outlines the results of telephone and email correspondence with representatives of other municipalities during January, 2017. Web research also supplements where appropriate.

Airdrie	
1	<p>Do you have more than one School Board that you are responsible for providing sites for?</p> <p>a. Do you have a formal process you use to allocate school sites to different Boards and/or to identify school sites?</p> <p>b. Do you have a formal agreement in place to deal with allocation of sites to different Boards and/or to identify school sites?</p> <p>c. Do you have an organized group/body/committee set up to deal with allocation of sites to different Boards and/or to identify school sites?</p>
	<p>Three School Divisions:</p> <ul style="list-style-type: none"> • Rocky View School Division • Calgary Catholic School Division, • École Francophone d'Airdrie <p>Airdrie has developed a "Joint use Committee." City Admin sits on it. Parks Department and Planning both sit on the committee, along with Superintendents or Facility Planning Managers from the School Boards. (Mostly the on-the-ground person responsible for planning.) They meet once a month. Minutes are read and approved. Formalized process to go back to decisions.</p> <p>Best person Archie Lang, Chairs the Committee and is Manager Parks for Airdrie—ext. 6416.</p> <p>No formal agreement right now, working with a signed MOU that says we all agree to get along to develop public lands. Cooperative team - work with School Boards as we are developing a new neighbourhood. Take a look at the 10% / opportunities / numbers / population growth. Where is the highest demand for the next school? Sit down and talk with them.</p> <ul style="list-style-type: none"> • City hosts meeting, Archie is Chair, planning members and a rep from School Boards, pull others for individual meeting as required. Better than not at all. • Dealing with School Boards and putting cards on table, and collectively coming to decisions. <p>Working on a formalized agreement, not signed, but about 90% complete. Waiting to see what the province comes up with MGA re-write. Regional development and management. MGA may include an insistence of a Joint Use Committee for all.</p> <ul style="list-style-type: none"> • Reviewing the 10%. School Boards want more land – but that comes at a cost to developers, to home owners, etc. • Conflict – always some and always a discussion. It's not perfect, but it seems to be working well. Talk logically, reasonably, we also need parks, lineal parks. Conflict resolution process will come in formal Agreement. <p>Airdrie likes to sit down right at the front end with ASP. Planning developer, School Boards, etc. so that no one feels left out of loop. City liaises with developers. Talk to boards about wants and needs.</p> <p>ASP- Community Area Structure Plans IDs future school locations. Neighbourhood Structure Plans. IDs school size, footprint, potentially some of playfield amenities. Boards are involved right from ASP level. Or even before then. Annexed 1200 acres and the developers are asking to go forward. We involve the School Boards at that level.</p>
2	<p>Does Council have any say in allocation of school sites? Is there political influence in the process?</p>
	<p>Other than adopting the plans, No. They are not involved in the Committee. Two Councillors sit on the ASP committee. Not a good idea to involve politics</p>

Airdrie		
3	Do you have any other comments to make about the allocation of school sites amongst different Boards and/or the identification of school sites in general?	<ul style="list-style-type: none"> • Fact that the School Boards decide ahead of time is helpful. When we move from the ASP to the NSP we already know which board we are working with. • As new communities come up we apprise the School Boards of all new developments. Pull out the plans and show the School Boards “x” acres. Often a total of 15 acres. School envelope 4-4.5 acres. With the 11 acres remaining, we develop community recreational space and school spaces as well – trying to combine both. • MGA talking about cooperative development and planning. Keep as much green space as possible available to all. Challenges with regional government and management. Largest city is the centre of planning core, then regional cities are part. New MGA seems to be hoping to realize some efficiencies.
4	Do you have a sunset clause on lands designated for schools (or other purposes)? Preventing development in established neighbourhoods.	It’s all public land. The land is all deeded to the City. Look at the criteria for the new schools before it is designated for a particular board. At that point in time, it would be joint ownership. If the school ever deemed it excess; it would come back to the City - after it has been looked at by other School Boards. The building itself, if it was still usable, would be looked at as a community use building.

Camrose		
1	<p>Do you have more than one School Board that you are responsible for providing sites for?</p> <p>a. Do you have a formal process you use to allocate school sites to different Boards and/or to identify school sites?</p> <p>b. Do you have a formal agreement in place to deal with allocation of sites to different Boards and/or to identify school sites?</p> <p>c. Do you have an organized group/body/committee set up to deal with allocation of sites to different Boards and/or to identify school sites?</p>	<p>Three Boards:</p> <ul style="list-style-type: none"> • Battle River School Division • Elk Island Catholic Schools • École des Fondateurs <p>ASP – “The applicant must pursue consultation with the local school districts in order to determine if there is need for additional school sites. . . . School sites identified in the ASP must distinguish the type of school planned (ex. elementary, junior high, K to 9, etc.), but at this point shall not specify the particular district (i.e. public or separate) that the school is intended for.”</p> <p>We are a part of that conversation. The guidelines are new – no experience in how that conversation would be structured. In the past, City would send referrals to School Boards and they would send requests to the City, and that would be sent back to developer.</p> <ul style="list-style-type: none"> • Long range planning was not done at all in the past. As subdivision built out, planning would go phase by phase. • A little about their lesson of “How not to do it.” We have a ValleyView West developing in Camrose. The Subdivision Plan had NO discussion with either School Board about needs, locations, servicing, and site allocation. We are still in a very bad position trying to design a site to accommodate land for two schools. The City may need to actually purchase additional reserve land. What would seem best possible location is not going to happen. Working with remaining options. The School Boards’ needs came about through Subdivision referrals sent to utilities, School Boards, etc. Boards replied saying that you need to supply a school site here. We weren’t planning on one, but needed two! • Our new requirements require that this process is now done at the very initial planning phases. • The School Boards have started to send annual growth projections and student populations to City. This new information will help us in the future. • City has a very positive relationship with the School Boards individually. But School Boards do not get along at all – a lot of history. A lot of representatives of Public Board lobbied hard to stop the first Catholic School - generational bad blood. Francophone Board is new (1 year). • Service agreements with each of the School Boards (separately) that we will share resources and facilities.

Camrose		
2	Does Council have any say in allocation of school sites? Is there political influence in the process?	Yes, very much so. We are wrestling with this. Should not be part of their mandate. They need to give us the authority to make the recommendations back to them. They each bring a different perspective. What they personally think the needs are, rather than what the data is telling us. Reflects the past history.
3	Do you have any other comments to make about the allocation of school sites amongst different Boards and/or the identification of school sites in general?	<p><i>How should this work?</i> Camrose's approach to determining sites: Proximity to other sites and facilities; opportunities for schools to partner to provide better resources to other citizens; where are deferred sites that are big enough for schools; green space masterplan. Growth projections that show areas of the City that are growing. Trying to find the synergies to find best location for school and City. Existing services as well.</p> <ul style="list-style-type: none"> • Growth projections will have a big influence on which school has priority. Has the province allocated resources? How much of a priority is this site for the School Boards. We haven't had a chance to have conversations about how that could be structured or who would be around the table. We should be able to figure it out. • We meet as needed, never both the School Boards around the table. Separate School Board feud started about 25 years ago. They make regular reminders that they are a "separate" board; not to be combined. <p>Undertone of stealing students from one to the other. In fact they have signed an agreement that they "do not" get along. Public High School has a huge site 15.1 hectares – Boards got together to say they would not "Co-locate."</p> <p>MGA - forced collaboration. We haven't taken it to try to get School Boards together. There are very small population clusters – may have to consider the School Boards if it is required.</p>
4	Do you have a sunset clause on lands designated for schools (or other purposes)? Preventing development in established neighbourhoods.	No. That is one thing that is positive of not planning long range. When we need to dedicate a site; the schools don't come to us until they need land. They approach us at that critical stage. As soon as it is designated construction starts within a year or two. Lands were not designated ahead of time. We will have to deal with usage of smaller schools in older locations at some point.

Edmonton		
1	<p>Do you have more than one School Board that you are responsible for providing sites for?</p> <ol style="list-style-type: none"> Do you have a formal process you use to allocate school sites to different Boards and/or to identify school sites? Do you have a formal agreement in place to deal with allocation of sites to different Boards and/or to identify school sites? Do you have an organized group/body/committee set up to deal with allocation of sites to different Boards and/or to identify school sites? 	<p>4 School Districts</p> <ul style="list-style-type: none"> • Edmonton Public School Board • Edmonton Catholic School Division • Conseil scolaire Centre-Nord <p>Joint-Use Agreement (JUA)– membership</p> <ul style="list-style-type: none"> • The City of Edmonton, relevant departments of which include: • Community Services Department • Asset Management and Public Works Department • Planning and Development Department • Transportation Department • - Edmonton Public School Board; • Edmonton Catholic School Board; and • Conseil scolaire Centre-Nord No. 2 • Joint Use Agreement Partners will involve other potential CKC partners as appropriate, including but not restricted to: • Public sector and Non-profit stakeholders (e.g. Edmonton Federation of Community Leagues, individual community leagues, Capital Health, Edmonton Public Libraries, Edmonton Sport Council); and • Private sector stakeholders. Joint Use Agreement Partners will include the plan proponent in any consultations held with other potential CKC partners.

Edmonton		
		<p>They have the JUA and essentially it determines how we look at School Allocation. The Urban Parks Management Plan allocates how much space when a school need is identified. We work with the School Boards to determine needs. What their services are; what their supply is. Two approaches:</p> <ul style="list-style-type: none"> • Existing or mature neighbourhood is one process. It involves the re-purposing of schools in older areas. New schools that are being proposed service larger school/student bases. Swap out three old schools and building 1 new. After this is done and led by the School Boards. • New sites new schools are different. Applications for ASP first. Serving a new population base of 60-80K people. CKC needs assessment. That will define the number of school sites that are required. • JUA dictates that all groups meeting together to discuss needs. Hierarchy of committees. JU Steering Committee and two sub-committees. Land Management Committee (planning of the facilities) and Facilities Management Committee (jointly using the site – bookings, etc.). These are the working groups and they report up to the Steering Committee. • We look at the allocations – generalization numbers that determine student generation will be. School sizes and what will be needed. What is our student generation prediction? CKC Needs Assessment comes into play. Where we want to place the schools and how they can enhance the remaining open space – ecological protection – community hub. How can we incorporate those? We allocate school sites to particular boards and level of schools in the ASP. Boards have their own calculations and they provide them. It is a standard number that we apply at that level. Neighbourhood plans revisit. ASP has 4-6 neighbourhoods. • Francophone Board is smaller. Trying to get them recognized in the Statutory Plans (ASP, NSP). Francophone board does not always know their needs. • CKC process. Technical document required to validate what the developers are proposing. ASPs brought to us by the developers.
2	Does Council have any say in allocation of school sites? Is there political influence in the process?	There certainly have a role - our ASPs and NSPs go to Council for approval on recommendations of support or non-support from Administration.
3	Do you have any other comments to make about the allocation of school sites amongst different Boards and/or the identification of school sites in general?	<ul style="list-style-type: none"> • One of the things we deal with changing needs of the School Boards and the Province. We have old school sites that have been assembled and ready for 10-15 years. They were planned based on the size of schools that the province was building at that time. Now they are bigger. We have trouble fitting the building of that size on the older plots. Trickle effect on the surrounding areas – parks, etc. • Advancements of Province now they are being more flexible with building envelope footprint. Cookie cutter approach or site specific. Topography, road alignment etc. • Typically park sites are in use prior to school being built – impacts already built infrastructure. • More detailed that you can be the better <ul style="list-style-type: none"> » Include the process of surplussing of school sites, first right of refusal. » Appraisal principles are missing. Lots of school sites are pre-MGA and not reserve land. If we want to retain them as park space, we have to pay the value of those. High level appraisal principles to know the future potential costs to get it back. No appraisal principles needed for non-reserve land. » Principles around servicing costs could be included as well. Now developers are more responsible for servicing, but not in the past. Municipality had to do it up front.

Edmonton		
4	Do you have a sunset clause on lands designated for schools (or other purposes)? Preventing development in established neighbourhoods.	No sunset clause remains a school site until boards declare it surplus. We typically designate them as MR. we are in the midst of changing how that land ownership takes place. For the Catholic it becomes theirs. It is joint between the City and Public for Public School Board.

Fort Saskatchewan		
1	<p>Do you have more than one School Board that you are responsible for providing sites for?</p> <p>a. Do you have a formal process you use to allocate school sites to different Boards and/or to identify school sites?</p> <p>b. Do you have a formal agreement in place to deal with allocation of sites to different Boards and/or to identify school sites?</p> <p>c. Do you have an organized group/body/committee set up to deal with allocation of sites to different Boards and/or to identify school sites?</p>	<p>2 School Boards:</p> <ul style="list-style-type: none"> • Elk Island Public • Elk Island Catholic Schools <p>We don't have much of a process in place right now. Looking at developing something more similar to St. Albert. New MGA will require it.*</p> <p>New sites are determined in new ASPs. Each site is listed as intended for particular age ranges. I.e: This site is for a high school; this is for a K-9. Parameters are outlined in the ASP. School Boards must decide from among these options.</p> <p>One situation occurred when we had identified a high school site near a recreation centre. We had two boards building schools. One School Board was building a K-9; the other a high school. The K-9 was considering the site, but they were redirected elsewhere because the ASP outlined a high school site.</p> <p>Currently there is no specific board, requests are handled by the Director of Planning and the Engineering team. We plan to have a committee (Maybe early 2018.) – beginning to consider membership right now. Our experience is suggesting more the “on the ground” people. Project Manager would put forth a recommendation. Leadership team would be advised of the decision.</p>
2	Does Council have any say in allocation of school sites? Is there political influence in the process?	Not at this time. Future is TBD.
3	Do you have any other comments to make about the allocation of school sites amongst different Boards and/or the identification of school sites in general?	<p>One of the challenges we have faced is that the site recently requested for the school was un-serviced when the Board started knocking on our door. There was another site available, but they wanted to be in the new growth area. Put us in a precarious situation where we were negotiating with developer. When we go to do our new school plan, we will be talking about that. City was in the middle. Site had to be serviced; developer had to pay; but the timeline was the School Board's not the developer's. Pressure to get it done sooner. We were trapped. Servicing costs have to be built into Alberta Infrastructure budgeting. Someone needs to upfront that money – who? In the end the developer did front the cost. The time, negotiations and energy it took were unpleasant.</p> <p>Our School Boards are asking for a lot of land. Design considerations could look at going up more instead of out. At this point the “asks” are eating through our MR dedications quickly.</p>
4	Do you have a sunset clause on lands designated for schools (or other purposes)? Preventing development in established neighbourhoods.	Yes, there are areas that are identified as possible school sites, but not formally designated or turned over. Putting schools on them now would be challenging. They are big parks and highly valued assets in the community - making it challenging to put school now.

Grande Prairie	
1	<p>Do you have more than one School Board that you are responsible for providing sites for?</p> <ol style="list-style-type: none"> Do you have a formal process you use to allocate school sites to different Boards and/or to identify school sites? Do you have a formal agreement in place to deal with allocation of sites to different Boards and/or to identify school sites? Do you have an organized group/body/committee set up to deal with allocation of sites to different Boards and/or to identify school sites?
	<p>3 School Divisions:</p> <ul style="list-style-type: none"> Grande Prairie Public School Division GP and District Catholic Schools Conseil Scolaire du Nord-ouest No 1 <p>"Well... I would have to say that I don't think there is a process at all." Certainly we have a P&D process, ASP, we ID future school sites. At some point they get developed by the developers.</p> <ul style="list-style-type: none"> Do a single school sites at about 5 hectares that are generally for the Public Division, Or do 10 hectares sites that are for both school Divisions. <p>When vacant sites are available, who gets that site is based on a conversation between the Boards. Generally, the City does not get involved. City plans for the sites, developers build them. Boards decide between themselves.</p> <ul style="list-style-type: none"> SCORES committee City and Boards jointly meet once in a while (maybe once every three months. Discuss things of common interest. School gyms are rented out in the evenings. Agreement states that City does all the booking. Might be where they talk about who gets what site. Membership is comprised of the City's Director of Community Living, and Superintendents from each Division. Francophone Division just became a member of the SCORES Agreement at the last update. Dan will look to see if it is public, then share if he can. Recently we have a case where ASP had both a single and double site. Catholic chose to go on the single site. Not sure what will happen to second half of dual site where public school is now located. Province is now requiring Divisions to build larger schools. In the future that might affect allocation. We may end up having surplus school sites. <p>Francophone – they have a K-12 school in GP. Couple years ago they were looking to expand, and maybe have 2 schools. They were looking around a little bit for a potential site. Instead decided to expand their existing.</p>
2	<p>Does Council have any say in allocation of school sites? Is there political influence in the process?</p>
	<p>I would say, beyond adopting the planning document, I would say very little to none.</p>
3	<p>Do you have any other comments to make about the allocation of school sites amongst different Boards and/or the identification of school sites in general?</p>
	<p>There are always benefits to having formal processes. Yet, when the fickle finger of government suddenly makes money available and then disappears. Formal processes become needlessly bureaucratic. Here there has been no conflict. Unsure of how it would be decided if there was a conflict or even who would make decision.</p> <p>Some of the sites are designed for both of the schools. 8-9 hectares. Eg. Francophone sitting on a site for 9 years, then another public school was added last year. Still lots of room.</p> <p>Our Catholic Board is regional so they serve a large rural population outside of the City, but build all the schools inside the City. There has been some issues. More bussing of students in. Francophone is bringing in from across the whole City, and maybe even outside. Rural public School Board also owns land in the City and have schools here.</p>

Grande Prairie		
4	Do you have a sunset clause on lands designated for schools (or other purposes)? Preventing development in established neighbourhoods.	I don't know if it is 100% related to larger schools. We do have a couple sites in ASPs that haven't even been developed yet. Probably not going to ever see a school on them. One is in the far SE corner, and development is not happening really fast there. City growth is east and NW. Might be unnecessary. At this point, my expectation it will probably be one of the City's MR with soccer fields, baseball fields.

Leduc		
1	<p>Do you have more than one School Board that you are responsible for providing sites for?</p> <ol style="list-style-type: none"> Do you have a formal process you use to allocate school sites to different Boards and/or to identify school sites? Do you have a formal agreement in place to deal with allocation of sites to different Boards and/or to identify school sites? Do you have an organized group/body/committee set up to deal with allocation of sites to different Boards and/or to identify school sites? 	<p>2 School Boards</p> <ul style="list-style-type: none"> STAR Catholic Schools Black Gold Regional Schools <p>Right now School Boards decide. They determine if they need a school in that community, or not, and we accommodate them ASPs done by developer and they communicate directly with the Boards. Onus is on the developer, when they bring their draft in to City, there is a school site; we then refer out to the School Boards again for comment.</p> <p>Sylvain Losier undertaking a project to review school allocations. Idea is to have the City designating school sites until a board actually has the provincial support. Currently, the public board will ask for a site in almost every section. Catholic Board didn't ask for much of anything. Then all of a sudden, they needed one and the fight was on. A few years ago, there was a site designated to the public board, but the Catholic Board got the funding. City had to negotiate to give the land to the Separate School, and then arrange for other land within the same development.</p> <ul style="list-style-type: none"> In new process, City would communicate with the Board about their numbers, and designate in the plan who it belongs to. Designate larger sites with joint schools, rather than two separate sites (which would be more land). Encouraging joint sites in the last year or so. Trying to get more of those. 10% MR only goes so far. <p>Sylvain – Expensive adventure to work with their School Boards. We are working towards the answer - For 2 years What we have concluded ...You cannot look at school sites by themselves. Integrated MR is required.</p> <ul style="list-style-type: none"> Divided process into 5 phases. 1. The City will map existing and future sites in ASP. We will work with School Boards to determine capacity in existing schools and evaluate feasibility of putting a school in future sites. School site status and requirements are changing. In 2010 we looked at K-6. Now trend is K-9. Now need to re-evaluate if they are equipped with amenities. The City will evaluate our future for next 50 years. What are land supply requirements? Involve School Boards with formula to determine school site requirements. City will define community standards of parks and trails that we want to ensure in each neighbourhood. Out of the 10% what is dedicated to each use. Where are gaps and shortfalls? City will work with School Boards to determine site locations without assigning it to a particular board. At the end of the day, until there is an announcement from the Province, we will NOT know who will get the school.

Leduc	
	<ul style="list-style-type: none"> Currently, there are signed agreements with each School Board. At the time, the agreements stated that we would supply the amenities. We are not meeting these. High school – our agreement dictates that we would provide 20 acres site. The most important thing is not the size, rather the location and amenities that it has available. Issues around what we build, how and who maintains it is surfacing. City and School Boards will need to discuss “share” agreements. Students and residents may have to share those facilities. <p>City will take control of MR acquisition and disposition strategies. School sites will maximize the benefits.</p> <p>Likely there will be a series of documents. First one we will be signing in the next couple weeks. An MOU to understand the scope of work and process. All three parties will be signatories. Then a MR policy – such a key component in life quality of community. Having a school site that is not connected is detrimental, or alternatively having beautiful parks without schools don’t make sense either. Adopt a City policy for the acquisition, allocation and disposition of School reserves. Keep everything MR until there is an announcement made, then we do the transfer. Currently there are binding agreements that say if there is a SR that doesn’t get built, the board is compensated.</p> <p>User Agreement will be the last document to define relationship between the City and the Schools for shared use.</p> <p>Cost of working in silos is too high. Subsidizing a lot of rural folks education costs. City of Leduc pays all the costs from the rural students from surrounding areas.</p> <p>City will be more involved with developers. The developer will try to put the site where they think it works, not what the School Board needs. At least 2 accesses are needed. The developers want a great community, but their pro forma must work. They need a clear set of guidelines to consider. We will let them know ahead of time whether they need a school site, and the criteria for that site.</p> <p>Currently we have 13 school sites. And 3-4 of them will likely need to be amended. A difficult situation for City because people move there with the expectation of having a school and if it is moved – they will uproar about losing their school AND the existing greenspace.</p> <p>We need to formalize things because people, organizations and communities change. Let’s make sure we have something that we can all agree upon and monitor. Way to track MR expense, supply and school needs on an annual base. We need to track the community and school trends. Competing all for the same dollar and piece of lands.</p>
2	<p>Does Council have any say in allocation of school sites? Is there political influence in the process?</p> <p>No – if there was a site that was previously designated that is no longer needed. There would be an understanding by the Boards that it is no longer needed and Council gets involved with the disposal or other developments.</p>
3	<p>Do you have any other comments to make about the allocation of school sites amongst different Boards and/or the identification of school sites in general?</p> <p>Struggling with the size of the schools. Previously designated sites are now considered too small. They need much more land. Existing sites are not able to accommodate a school. Apparently there is not a standard, just general guidelines. If Alberta Ed could come up with a standard size that would go into the future.</p> <p>Process has been good to date. Uncertainty of when the schools will be built. The boards don’t know when, or if, the school will be built, then there is a short turn around when it is funded.</p>

Leduc		
4	Do you have a sunset clause on lands designated for schools (or other purposes)? Preventing development in established neighbourhoods.	No, we don't. That's another thing that Sylvain is working on. Getting the School Boards to re-evaluate their numbers, and if they don't need the sites, to give them back.

Lethbridge		
1	<p>Do you have more than one School Board that you are responsible for providing sites for?</p> <p>a. Do you have a formal process you use to allocate school sites to different Boards and/or to identify school sites?</p> <p>b. Do you have a formal agreement in place to deal with allocation of sites to different Boards and/or to identify school sites?</p> <p>c. Do you have an organized group/body/committee set up to deal with allocation of sites to different Boards and/or to identify school sites?</p>	<p>4 School Divisions</p> <ul style="list-style-type: none"> • Lethbridge School District No 51 • Holy Spirit Roman Catholic Separate Regional District • Palliser Regional Schools • Francophone – recently added to discussions. <p>Not specifically no – there are no formal agreements. They got caught a bit on the GOA announcements of new schools. We went from a proactive to reactive stance. Now going back after flurry - two recent schools built, one in process. Now we have the projections and we talk back and forth about the information. The City shares the Traffic studies that indicate growth areas.</p> <p>ASP seeks to involve the school districts. The School Districts' perceptions seem to be that when a school site is identified on the plan, the site is ready for a school. That is not the case. When we look at a best place for the school in the ASP, it may be 10 years away. From one perspective it is good to have it in the middle of the area (10-15 years to development) or at the edge of the community - if it is needed at the beginning of the process. Walkability means you have to wait.</p> <p>Lethbridge has slower (2%) growth rate than other municipalities. Average 25 years to develop a school site. We have had instances where the district has a capital plan in place, they want a school in a specific site, and they may have to wait. Now they are in a forced position to change plans and retrofit existing plans to meet the need.</p> <p>Joint Use Agreements are a three pronged document - wanting to finalize with Districts. One prong explains MR and school sites. Another prong outlines Joint use of school building and grounds; third part outlines parks standards being introduced includes sizing. Not part of the MDP, hoping to include in the 2019 review as an appendix at least. City upsizes gymnasiums and playing fields and then rent them out to community groups.</p> <ul style="list-style-type: none"> • We have joint meetings quarterly – share information. Information of the day (cell phone towers), growth areas, needs, allocation. And then if we have a project on the go it is more often. • Discussions being led by our senior planning team – planning, community services, real estate and land development. Wrinkle is the RE and Land department that is able to accommodate faster than the private developers can. Education process for all. We are now trying to formalize things with School Districts because of retirements there so that new people can better understand the process. <p>We used to do Outline Plans years ago identifying school sites for each district. Now just outlining the level. (i.e. K-9; 10-12)</p> <p>Now they wait to see who it suits the best. Separate school district does more bussing. Prefer schools on outskirts of neighbourhood. Francophone now looking at west side. Whose needs are the most urgent or has the most spaces.</p> <p>Two update plans coming up. We are going to try to work more closely with the districts to identify the best site. Hopefully they will embrace and learn from that.</p>

Lethbridge		
2	Does Council have any say in allocation of school sites? Is there political influence in the process?	Only on the approval of ASP and re-zoning. Mostly just a check. They have been great.
3	Do you have any other comments to make about the allocation of school sites amongst different Boards and/or the identification of school sites in general?	<p>Whole idea of site sizing is important. Those built in 60s-70s were smaller. In the past, school districts told us what they wanted and we gave it to them. Now trying to look more at information and data. Now incorporating Dry ponds. How do you share the use of the school sites? Balance for everyone developer, schools, etc. School Districts have a better idea of what the parents are saying to them.</p> <ul style="list-style-type: none"> • Need for parent drop off, good pedestrian connections and separations from the drivers. <p>Being honest and realistic about the function and demands.</p> <p>Biggest thing is to keep the lines of communication open. We need to continually re-educate the educators. They are responsible to their boards and the province as well.</p>
4	Do you have a sunset clause on lands designated for schools (or other purposes)? Preventing development in established neighbourhoods.	We have only had 1 school site that did not revert to a different school district. Normally they get taken over by another division. One given up by the Catholic Board was turned into a large daycare. There was no MR designation and it was sold to a church. Old school sites from the 30s-40s. Site in the 80s as a MR – took part of this as housing. We do not turn our MR into SR until there is actually a school. Province agrees to fund it. It means we have to work more closely with the Districts because they do not have any land.

Medicine Hat	
1	<p>Do you have more than one School Board that you are responsible for providing sites for?</p> <p>a. Do you have a formal process you use to allocate school sites to different Boards and/or to identify school sites?</p> <p>b. Do you have a formal agreement in place to deal with allocation of sites to different Boards and/or to identify school sites?</p> <p>c. Do you have an organized group/body/committee set up to deal with allocation of sites to different Boards and/or to identify school sites?</p>
	<p>2014 – Erin noted that MH was working on a framework</p> <p>2 School Boards</p> <ul style="list-style-type: none"> • Medicine Hat School District No 76 • Medicine Hat Catholic Board of Education <p>Since 2014, no, we have not developed a new framework. We have a 1980 Agreement in place with the School Boards and it has worked OK until now. We knew that the MGA update may require changes. "Continuing the Conversation" talked about changes to site selection and Joint Use – just waiting to see what comes out of that.</p> <p>Existing process – We don't have anything special. Case by case; project by project basis. Either the City or Developer will reach out to the School Boards. What are their needs? When it gets to us as regulator, we ensure that what has been agreed to /proposed is the right amount. We still struggle with each project. We are not a big municipality. Our boards are not large. We have growth, but not enough for the School Boards to have dedicated planners who adequately determine their needs. The default is standard – ask for more because they don't really know their needs.</p> <p>We have twice a year meetings (semi-annually) with the School Boards and City Staff that work on broad issues – sometimes site selection. Project by project basis. We are asking the Boards that if you request sites, please back up with statistics. Percent of school kids, catchment areas.</p> <ul style="list-style-type: none"> • Bussing and driving to different areas is possible. Catchment areas are relatively open because of geographic size of. <p>Generally members are all higher level – GM/Commissioner level – need decision makers at table because that is where decisions are being made. Multi-departmental – Planning, Parks and Rec Commissioner, Superintendents from the School Boards.</p> <p>Conflict is typical – just hammered out and negotiated on a site by site basis. There have definitely been some neighbourhoods where they both want sites. Trying to get creative and work on it. Generally want sites in the newer subdivisions. Their needs may or may not match community needs. It gets worked out. People are pretty practical.</p>
2	<p>Does Council have any say in allocation of school sites? Is there political influence in the process?</p>
	<p>No – other than they do adopt the ASP bylaw. If the Boards, developers and City were at odds they may come to the table.</p>
3	<p>Do you have any other comments to make about the allocation of school sites amongst different Boards and/or the identification of school sites in general?</p>
	<p>Not necessarily – the 1980 Agreement is OK for site allocation. The bigger issue will be the Joint Use that will likely come from the MGA.</p> <p>Great relationships are as important as a great framework. To date, in the absence of a great framework, we have built great relationships. Resources are strained; until we get resources from the Province we don't get too excited about changing processes.</p>
4	<p>Do you have a sunset clause on lands designated for schools (or other purposes)? Preventing development in established neighbourhoods.</p>
	<p>No. We don't hand them over as School Reserves until they have the money from the Province. We ask the developers to fully landscape the sites, so at worst, if they don't ever get Provincial funding, it may not be the best site for parks, but it is at least landscaped.</p>

Red Deer	
1	<p>Do you have more than one School Board that you are responsible for providing sites for?</p> <ol style="list-style-type: none"> Do you have a formal process you use to allocate school sites to different Boards and/or to identify school sites? Do you have a formal agreement in place to deal with allocation of sites to different Boards and/or to identify school sites? Do you have an organized group/body/committee set up to deal with allocation of sites to different Boards and/or to identify school sites?
	<p>3 School Divisions</p> <ul style="list-style-type: none"> Red Deer Public School District Red Deer Catholic School District École la Prairie <p>Joint Use Agreement that exists. He will contact someone to send to me.</p> <ul style="list-style-type: none"> School site locations were located and dedicated to a specific School Board within each ASP. More recently, the sites are allocated as a school site without dedication. Ran into issues with those not required. Reduced the number Identified in the Neighborhood structure Plan. Have not gone back to change existing plans. Major ASP covers 10 sections of land or more. Neighborhood deals with 1-2 quarters. Each site is allocated on a "First come first served" basis, and the needs of the School Board. Joint use agreement is from years ago. That plan does not cover most recent approach. Unknown about how conflict would be handled. Likely by civil conversations within Joint Use. Based mostly on who is ready to build next. Within Agreement – Community Services is responsible, Recreation Parks and Culture manager (MR pieces default to parks), each of the School Boards. Planning provides assistance. Outlines have a park in it, a portion of which the School would get. Outlines for what parcel sizes are. Not too strict; that parcel may shift. Consultation process is that School Boards are brought in once or twice as a check in. All School Boards on all plans.
2	<p>Does Council have any say in allocation of school sites? Is there political influence in the process?</p>
	<p>They do when they approve the major ASP. Sign off on it again at the Neighbourhood Structure Plan.</p>
3	<p>Do you have any other comments to make about the allocation of school sites amongst different Boards and/or the identification of school sites in general?</p>
	<p>School Boards are pretty involved in the process. They know when and where the next site is going to be available. ASP will have a design plan for the site. Sets things up before the need in consideration of construction of sites.</p> <ul style="list-style-type: none"> Level of school is indicated as either K-9 or Grades 10-12. Former school site identified as K-9 and they didn't need the site. The Francophone school wanted to build a K-12, so public had to be consulted because of the high school proposal. What level of school to go on site is outlined. Most is developer funded through the MR fund that we collect. Standards include soccer field, baseball field, etc., snow bank rink.
4	<p>Do you have a sunset clause on lands designated for schools (or other purposes)? Preventing development in established neighbourhoods.</p>
	<p>No, but it would be nice to have. It would be ideal because schools have turned over a few recently. Used to be every ¼ section had a central park. Now we have shifted and attempt to make a more reasonable estimation of what is needed. Depends on the amount of information the School Board is able to provide.</p>

Spruce Grove

1	<p>Do you have more than one School Board that you are responsible for providing sites for?</p> <p>a. Do you have a formal process you use to allocate school sites to different Boards and/or to identify school sites?</p> <p>b. Do you have a formal agreement in place to deal with allocation of sites to different Boards and/or to identify school sites?</p> <p>c. Do you have an organized group/body/committee set up to deal with allocation of sites to different Boards and/or to identify school sites?</p>	<p>2 School Divisions:</p> <ul style="list-style-type: none"> • Parkland School Division No 70 • Evergreen Catholic Separate Regional Division No 2 <p>No Formal process – school division comes to us and says “we need a school ... NOW,” and this is about where we think we want it. Then we work together to find one.</p> <ul style="list-style-type: none"> • The 1982 Agreement is between the Town, County and Separate School Division. Does not include Parkland School Division. • There is an Agreement with Parkland, but not in relation to site allocation. <p>We have been “flying by the seat of our pants.” Division gets money from the Province and then they work with the planning department to figure it out. It just kind of happens. We were lucky with the last site, there was a developer planning for the area. This new school site was allocated to Parkland Division with enough space to build another school for the Catholic divisions.</p> <ul style="list-style-type: none"> • No formal decision-making body or process in place. <p>Under our old ASPs, School sites were allocated, but schools were never built, Sites were too small. We do have MR sites sitting there that were originally allocated for schools, but will never be one.</p> <p>We haven’t had conflicts between the Divisions. People have been working well together. School Divisions need to be happy that they are getting land at. MGA does not say that the municipality MUST provide the land, only that their MRs could be used for schools.</p>
2	<p>Does Council have any say in allocation of school sites? Is there political influence in the process?</p>	<p>Ultimately they approve the ASP and Land Use Plan. But in practice, by the time it gets to Council, the allocation has been made.</p>
3	<p>Do you have any other comments to make about the allocation of school sites amongst different Boards and/or the identification of school sites in general?</p>	<p>To the Provincial Government – municipalities have a lot of frustration about the lack of direction, or consistent direction, to municipalities on the requirements for school sites! Who is responsible to service site? Developers give up the land, but don’t want to service it. School Divisions cannot afford to service it. The municipality is left in the middle of the discussion.</p> <ul style="list-style-type: none"> • Everyone should strive to work well together. Divisions are generally happy that they are getting a new school at all. Spruce Grove has been under the gun with the rate of growth. We have had two new schools in the last 10 years.
4	<p>Do you have a sunset clause on lands designated for schools (or other purposes)? Preventing development in established neighbourhoods.</p>	<p>We do not. What we did allocate under the ASP in the past was in the form of an MR that could be used for a school, but now they are just too small. Too many players at work for Sunset Clauses, unless it is linked to growth rate.</p>

NOTES: Debra Irving, Director of Planning and Development, was on holidays. She is the person with the primary responsibility for school site allocations. I was put through to Sue Armstrong.

Strathcona County/Sherwood Park	
1	<p>Do you have more than one School Board that you are responsible for providing sites for?</p> <p>a. Do you have a formal process you use to allocate school sites to different Boards and/or to identify school sites?</p> <p>b. Do you have a formal agreement in place to deal with allocation of sites to different Boards and/or to identify school sites?</p> <p>c. Do you have an organized group/body/committee set up to deal with allocation of sites to different Boards and/or to identify school sites?</p>
	<p>3 School Boards:</p> <ul style="list-style-type: none"> • Elk Island Public Schools • Elk Island Catholic Schools • Francophone Education <p>Just re-did our agreement with the School Boards in December 2016. Our agreement follows pretty close to St. Albert – values, principles, etc. Outlines the “Allocation Committee.” Members include Chief Commissioner and Superintendents of each of three boards. Administration brings reports to the committee that they use for decision-making. Committee will meet once a year; first meeting will be in March.</p> <p>Agreement states that sites are not allocated to a particular board until provincial funding is approved. School must be built within 2 years. If it does not get built; the site comes back to us for review and possible re-allocation.</p> <p>ASP – meet with the boards, discuss. Ensure appropriate school sites are planned. Designate the level of school. True allocation doesn’t come until approval comes from Province.</p> <p>Before this new Agreement there was no formal process. In the past, the boards would come and we would fit them into what we had existing.</p> <ul style="list-style-type: none"> • Some of planned sites, ASP done in 1998, took a 9 acres site. Now Boards need a 15 acres site. • Old sites were on a lease – not formally turned over <p>As we build new schools with the new agreement, we are giving the schools the land instead of keeping it as County land. Push to have it in the board’s name. Cleaning up thing. We still have the first opportunity to buy a surplus site.</p> <p>Also have a Joint Use Agreement with our boards. Special access to our pools; we have access to their gymnasiums. That agreement has been around for a while, and is now under review.</p>
2	<p>Does Council have any say in allocation of school sites? Is there political influence in the process?</p>
	<p>No – ASP approval.</p>
3	<p>Do you have any other comments to make about the allocation of school sites amongst different Boards and/or the identification of school sites in general?</p>
	<p>Making sure that all needs are included. Francophone school is new and want to make sure everyone is on the same page.</p> <p>If a school becomes surplus, Strathcona County has first option to buy it. If not, Board can subdivide land and sell it. Municipality does not want to lose valuable recreational site if it is a surplus school.</p> <p>We have sold our first surplus school and the second is coming up – old and rural schools with land not needed by County.</p> <p>Agreement has put the formal process in place that we didn’t have before. True written up process that continues regardless of persons in positions.</p>
4	<p>Do you have a sunset clause on lands designated for schools (or other purposes)? Preventing development in established neighbourhoods.</p>
	<p>No</p>

Appendix D: School Site Allocation Memorandum of Understanding

To Be Inserted

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