

DalewoodElementary Accommodation Review

Dalewood – Prince Philip – G.R. Allan

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Report To: Director of Education
Hamilton-Wentworth District School Board

Report From: Dalewood Accommodation Review Committee

Submitted On: **December 2, 2011**

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1.0 Daniel – tables are all labelled X and will need to be labelled appropriately.

2.0 Daniel – any references to page #s will have to be adjusted throughout the report if paging changes.

3.0 Executive Summary

On January 24, 2011, the HWDSB Board of Trustees approved a recommendation by the Committee of the Whole to initiate the Dalewood Accommodation Review. The review catchment included Dalewood, Prince Philip, and G.R. Allan elementary schools; with the scope to review attendance boundaries and “school consolidation to align with the Board’s Capital Priority submission to the Ministry of Education” (Executive Report To Committee of the Whole, January 10, 2011). The rationale for implementing an ARC in this area was two pronged; the facility condition index (FCI) showed that all three schools required extensive repairs beyond the operational budget of the board, and although the 10 year enrolments were projected to be 89% of capacity, the three schools were expected to have 14 surplus classrooms.

The Dalewood Accommodation Review Committee carefully reviewed, considered, and analyzed the information provided by the HWDSB staff, community members, and expert opinion. Based on consideration of the best learning environment for our children, the Dalewood ARC recommends that:

- a. All three of the schools identified in the Dalewood ARC remain open and their existing grade structure and program offering remain intact (Map #1). The approval of this recommendation was achieved through a consensus vote at Working Group Meeting #7 (Appendix ##). This is a cost effective option that protects the distinct healthy walkable communities within the ARC, and is most responsive to the data considered and the input received from the community.
- b. The Board explore with the Ministry of Education the ability to reclassify or remove the classrooms in the basement of G.R. Allan from the SFIS database, when the classrooms are no longer required as teaching spaces, as they are a suboptimal learning environment due to noise.
- c. The board support capital investment to maintain all three facilities. The board has not placed priority on the renewal needs of Dalewood and Prince Phillip, as these schools have not been considered viable by the board. The shadow of the PTR designations continues to affect renewal priority. The ARC committee recommends this practice cease as the evidence supports long term viability for all three schools.
- d. The Board of Trustees consider the following recommended upgrades to Dalewood and G.R. Allan when making their final decision.

Dalewood	G.R. Allan
Elevator	Elevator
Larger staff and work room	Larger staff/work room OR Book room
Book room	Accessible washroom
Accessible washroom	2 nd Floor washroom

- e. **The Board of Trustees review revised enrolment projections based on Oct 31 2011 enrolment data, Mandarin program maturation and Special Education capacities (see page 21 Table X)**

The Dalewood ARC developed and analyzed a total of 13 possible options before making the above recommendations. A number of factors made it possible to dismiss many of these options very early on in the discussion, including grade structure, the possibility of split grades due to low enrolments, limited land available at each site, unmoveable geographical boundaries, and the financial impact.

Upon thorough examination of the data, the ARC concluded that there was little support for the consolidation of any of the three schools. The facility condition data, enrolment projections, capacity, program offerings, transportation costs, and the health benefits of walkable local schools provide clear evidence that the best option to support student achievement is to maintain all three schools with their current programming.

The Dalewood ARC believes that the HWDSB option to close Prince Philip and consolidate the student body at GR Allan is not a suitable option as it relies on inaccurate enrolment projections, inaccurate FCI ratios, is more expensive without a guarantee of adequate funding and will not address the imbalance in the English and French immersion program streams in the long-term.

2.0 Introduction

2.1 Accommodation Review Policy

In June 2009, the Ministry of Education revised its “Pupil Accommodation Review Guideline” which outlines the necessary steps to follow when school closures are being considered. In accordance with the guideline, the Hamilton-Wentworth District School Board revised its Pupil Accommodation Review Policy (No. 12.0, Appendix ##), in December 2009.

The Pupil Accommodation Review Policy states that the Hamilton-Wentworth District School Board is committed to providing viable learning programs in quality facilities in a fiscally responsible manner. Various factors may result in the need to consolidate, close or relocate one or more schools in order to align pupil accommodation with resident enrolment. These factors include: changes in demographics and/or student enrolment, mobility rates and/or migration

patterns, government policies or initiatives, curriculum or program demands, operating costs, and the physical limitations of buildings.

The mandate requires an ARC to produce a report to the Board which addresses a number of different criteria including accommodation, facility condition, program, transportation, funding, and implementation.

This report outlines the recommendation of the Dalewood Accommodation Review Committee and details the work completed by the ARC throughout the entire process.

2.2 Rationale for initiating the Dalewood ARC

In 2006, Dalewood and Prince Phillip were designated as “Prohibitive to Repair” [PTR] under the Good Places to Learn framework by the Ministry of Education [MOE] (Memorandum, PTR School Options, October 31, 2006). The PTR designation was given to schools with an FCI or Facility Condition Index of 65 or greater. The FCI is a ratio of repair expenses to school replacement costs. Schools designated as PTR were not considered for capital investment related to “high and urgent needs” as it was assumed “that these schools were candidates for replacement rather than renewal investments” (Memorandum, PTR School Options, October 31, 2006). Although the PTR inventory was eliminated in 2007, Dalewood and Prince Phillip continued to be plagued by the designation and the precipitous renewal assumption receiving only 42k in renewal investments from 2008 to 2010. Given the lack of investment in the three schools over the seven year period from 2006- 2011, it is not surprising that the FCI ratio has steadily increased, precipitating this accommodation review process.

On January 24, 2011, the Trustees approved a recommendation by the Committee of the Whole, to initiate the Dalewood Accommodation Review Process, which included Dalewood, Prince Philip, and G.R. Allan elementary schools with a scope to review attendance boundaries and “school consolidation to align with the Board’s Capital Priority submission to the Ministry of Education” (Executive Report To Committee of the Whole, January 10, 2011). The scope differed from the other recommended accommodation reviews where “potential consolidation” was to be considered.

Approval to initiate the Dalewood ARC was based on FCI data that two of the three schools were too expensive to repair; all three schools currently exceeded the critical classification of 30% with two of the schools exceeding 80% [refer to Table X]. The 10 year renewal costs were expected to be almost 13.7M dollars while replacement of all three schools was expected to be 21M [source: SIP]. The exclusion of these schools from consideration for renewal investment continues and remains until the ARC process is completed.

As well, enrolment projections for the three schools were not favourable to maintaining all three facilities, as 2009 projections by the board predict a decline of 16% by 2020. This predicted decline results in a cumulative capacity of 76% (or a shortage of 273 students) in just over a decade.

In preparation for the Accommodation Review process, a data entry error was discovered and corrected resulting in revised FCI for all three schools. The revised FCI were all below the 2006 PTR candidacy threshold of 65. One would ask if an ARC would have been recommended and initiated by the Trustees based on the enrolment projections and the revised FCI data. Furthermore, without the PTR designation, the schools would have been eligible for much needed capital investment over the past seven years, resulting in an improved facility condition index.

Table X: Facility Condition Index Data Comparison

School	Committee of the Whole Data		ARC Support Data		% Change	
	Current FCI	10 year FCI	Current FCI	10 year FCI	Current FCI	10 year FCI
Dalewood	105.22%	145.53%	45.75%	63.27%	59.47	82.26
Prince Phillip	80.24%	97.74%	54.62%	66.69%	25.62	31.05
GR Allan	58.6%	86.81%	45.93%	66.35%	12.67	20.46

An Accommodation Review Committee (ARC), comprised of parents, students, community representatives, principals, teachers, trustees and non-teaching staff began its work on April 6, 2011.

3.0 Accommodation Review Process

3.1 Purpose of the Accommodation Review

School Boards in Ontario are responsible for providing schools and facilities for their students and for operating and maintaining their schools as effectively and efficiently as possible to support student achievement. The purpose of the Pupil Accommodation Review Policy is to provide direction on the future of a school or group of schools.

The Accommodation Review Committee (ARC) serves as an advisory body to the Board of Trustees of the Hamilton-Wentworth District School Board. The mandate of the Dalewood ARC, as outlined in the Terms of Reference ([Appendix ##](#)), is to produce a report to the Board that encompasses the following:

- (a) Accommodation:** Develop recommendations to maximize the utilization (enrolment as a percentage of Ministry “on-the-ground capacity”) of Board facilities in the review area with a target of 100% utilization for a

future ten-year period achieved through accommodation changes including, but not limited to, school closures, new school construction, permanent additions, (i.e., bricks and mortar structures), non-permanent additions (i.e., portables or portapaks), and partial decommissions (i.e., the demolition or shut-down of part of a building).

(b) Facility Condition: Develop recommendations for capital improvements (i.e., repairs, renovations or major capital projects such as new construction) into existing facilities and sites along with a funding strategy to pay for those improvements.

(c) Program: Develop recommendations around the strategic locations of Elementary School programs, including, but not limited to, regular programs, programs of choice, French immersion, special education, care treatment and correctional programs and alternative education.

(d) Transportation: Develop recommendations that address the implications of other recommendations on pupil transportation.

(e) Funding: Develop a funding strategy to address any capital works that are contemplated in the recommendations above.

(f) Implementation: Develop recommendations for implementation timeframes for any of the above recommended changes.

(g) Scope: The ARC's work (i.e., discussion and recommendations) applies only to the following schools: Dalewood, Prince Philip and G.R. Allan.

(h) Timeline: The ARC will complete its work and submit its report to the Director of Education by Friday, October 28, 2011. Please note that the Dalewood ARC requested and was granted an extension by the Board of Trustees to extend its report deadline until Friday, December 2, 2011.

To fulfill this mandate a number of key criteria was considered by the ARC. These *Reference Criteria* include the following:

(a) Facility Utilization: Facility Utilization is defined as enrolment as a percentage of "on-the-ground" capacity. The goal is to maximize the use of Board-owned facilities over the long term.

(b) Permanent and Non-permanent Accommodation: Permanent accommodation refers to “bricks and mortar” while non-permanent construction includes structures such as portables and portapaks. The goal is to minimize the use of non-permanent accommodation as a long-term strategy while recognizing that it may be a good short-term solution.

(c) Program Offerings: The ARC must consider program offerings, each with their own specific requirements, at each location. Program offerings include, but are not limited to: regular programs, programs of choice, French immersion, special education, care treatment and correctional programs and alternative education, etc.

(d) Quality Teaching and Learning Environments: The ARC should consider the program environments and how they are conducive to learning. This includes spaces such as Science Labs, gymnasias, other specialty rooms, etc.

(e) Transportation: The ARC should consider the Board’s existing Transportation Policy and how it may be impacted by or limit proposed Accommodation Scenarios.

(f) Partnerships: As a requirement of the HWDSB Policy and Ministry of Education guidelines, the ARC should also consider opportunities for partnerships.

(g) Equity: The ARC should consider the Board’s Equity Policy, specifically as it relates to accessibility, both in terms of the physical school access as well as transportation and program environments.

3.2 Composition of the Accommodation Review Committee (ARC)

The Board’s policy stipulates that ARC membership will consist of the following persons:

- **Chair - One Member of Executive Council** *(to be appointed by the Office of the Director) who will not have any “Voting” status;*

Voting Members Include the Following:

- **One Principal** that is not directly associated with any of the schools in the Review Area *(to be chosen by the respective Principals’ Association);*
- **One Teacher** that is not directly associated with any of the schools in the Review Area *(to be chosen by the respective Teacher Union Executive);*

- **Two Student Leaders** from outside the review area (to be chosen by Executive Council in the case of an Elementary ARC);
- **Two “Public School Supporter” Community Leaders** (*Community Leaders must not be directly associated with any of the schools in the Review Area. Community Leaders are to be appointed by the Parent Involvement Committee*);
- **Two Parent Representatives** from each of the schools directly affected by the accommodation review (*to be appointed by School Council*);

Non-voting Members include the Following:

- **Any Superintendent of Education** whose direct responsibilities include a school in the Review Area;
- **The Trustee(s)** whose ward includes a school in the Review Area;
- **The Ward Councillor(s)** whose ward includes a school in the Review Area;
- **One Principal** from each of the schools directly affected by the accommodation review;
- **One Teacher** from each of the schools directly affected by the accommodation review (*to be chosen by teaching peers*);
- **One Non-Teaching Staff Representative** from each of the schools directly affected by the accommodation review (to be chosen by non-teaching staff members at each of the schools).

In accordance with the above composition guidelines the table below represents the Dalewood Accommodation Review Committee membership list:

Position	School Affiliation	Name
Chair & Superintendent of Student Achievement		Krys Croxall
Voting Members		
One Principal Representative		Maria Carbone
One Teacher Representative		
Two Student Leader Representatives		Emily Reid
Two Public School Community Leader Representatives		Pamela Irving
Two Parent Representatives	Prince Philip	Nadia Coakley Michael Reid
Two Parent Representatives	G.R. Allan	Suzanne Brown Kristen West
Two Parent Representatives	Dalewood	Kim Newcombe Anita McGowan

Non-Voting Representatives		
Area Trustee		Judith Bishop
Area Ward Councillor		Brian McHattie
Principal	Prince Philip	Denise Minardi
Principal	G.R. Allan	Michelle Rodney-Bartalos
Principal	Dalewood	Joanne Hall
Teacher	Prince Philip	Colleen Morgan
Teacher	G.R. Allan	SilvanaGalliLamarche
Teacher	Dalewood	Peter Martindale
Non-Teaching Staff Representative	Prince Philip	Debra Lewis
Non-Teaching Staff Representative	G.R. Allan	Heidi Harper
Non-Teaching Staff Representative	Dalewood	Margaret Jobson

3.3 Meetings of the Accommodation Review Committee

In preparation for the four public meetings, the ARC was also involved in ten (10) working group meetings. The Terms of Reference for the Dalewood ARC originally identified only four (4) working group meetings; however the Committee felt that they required additional time to properly review the data, develop options, and feel comfortable with their final recommendation and as a result held six additional (6) meetings, including two additional meeting added at the end of the process to finalize the ARC report. Although working group meetings were centred on ARC members' discussion, the public was invited to attend as observers.

As outlined in the Terms of Reference, the ARC held four public meetings in order to receive input from the community as follows:

a. **Public Meeting #1 (April 6, 2011, Dalewood)**

Members of the Public in Attendance: 73

At the first public meeting, the ARC described its mandate, provided an overview of the accommodation review process, and reviewed the data contained within the School Information Profiles (SIP). After the presentations by resource staff, the ARC Chair facilitated a question/answer session with members of the public. **Members of the public expressed considerable consternation regarding the absence of the board option at this meeting. Many in attendance wanted to hear the board's recommendation at this meeting, and felt their time had been wasted in coming to hear only about the process.**

b. **Public Meeting #2 (May 19, 2011, Dalewood)**

Members of the Public in Attendance: 103

At the second public meeting, resource staff provided an overview of the accommodation review process and presented the accommodation option created by Board staff. After the presentations by resource staff, the ARC Chair facilitated a question/answer session with members of the public. In preparation for Public Meeting #2, the ARC held the following working group meetings:

- Working Group Meeting #1 (April 28, 2011)

c. **Public Meeting #3 (October 5, 2011, Dalewood)**

Members of the Public in Attendance: 76

At the third public meeting, resource staff provided an overview of the accommodation review process and members of the ARC reviewed the work that they had completed to date, presented the three proposed accommodation options and discussed the next steps of the committee. After the presentations, the ARC Chair facilitated a question/answer session with members of the public. In preparation for Public Meeting #3, the ARC held the following working group meetings:

- Working Group Meeting #2 (June 8, 2011)
- Working Group Meeting #3 (June 22, 2011)
- Working Group Meeting #4 (September 7, 2011)
- Working Group Meeting #5 (September 14, 2011)
- Working Group Meeting #6 (September 27, 2011)

d. **Public Meeting #4 (October 19, 2011, Dalewood)**

Members of the Public in Attendance: 57

At the fourth public meeting, resource staff provided an overview of the accommodation review process while ARC members presented their final recommendation. The presentation provided an outline of the ARC report that will be presented to the Director of Education December 2, 2011. After the presentations, the ARC Chair facilitated a question/answer session with members of the public. In preparation for Public Meeting #4, the ARC held the following working group meetings:

- Working Group Meeting #7 (October 12, 2011)

Another Working Group Meeting (#8) was held on November 10, 2011 to review community input from Public Meeting #4 prior to finalizing the ARC option and report. Two final working group meetings were held on November 23, 2011 and November 29, 2011 to finalize the ARC report. Detailed minutes of all of the public meetings and working group meetings were recorded, made available to the public via the Board's website and are attached as appendices to this report.

3.4 Resources Available to the Accommodation Review Committee

Throughout the entire process ARC members relied on a number of resources and data to assist them in developing and assessing potential accommodation options. These resources include the School Information Profiles (**Appendix ##**), the ARC resource binder and the knowledge of resource staff. All of the information contained within the resource binder (including the School Information Profiles) was made available to the public via the ARC website and has been included in the appendices of this report.

3.4.1 School Information Profiles (SIP)

Prior to the commencement of the ARC, the Board in accordance with the Ministry of Education Guideline developed and approved a School Information Profile. The SIP is a “tool” available to the ARC designed to provide an overview of each of the schools based on the following considerations:

- *Value to the student*
- *Value to the community*
- *Value to the school board*
- *Value to the local economy*

The SIP document provided a starting point and the ARC then customized each school profile to address unique local factors which should be considered during the ARC process. Review of the SIP allowed the ARC members to gain a better understanding of all the schools involved in the process.

3.4.2 School Tours

Tours of the facilities involved in the ARC process were conducted June 22, 2011. During that time, ARC members were provided with the opportunity to participate in guided tours of schools included in the accommodation review process. The 30-45 minute tours included a site walk of the outside of the facility as well as a tour of the interior (i.e., gymnasium, classrooms, library, etc.).

3.4.3 Resource Staff and Meeting Minutes

Resource staff was available at all public and working group meetings to assist the ARC members in deciphering any information in the resource binder and to address any questions regarding Board/ Ministry of Education policies and guidelines. Resource staff was also available to respond to requests for additional information from the ARC, as directed by the Chair. The ARC also used the minutes of all meetings as reference documents.

3.5 Communication Strategy

Very early on in the process the Board realized the importance of developing an effective communication strategy to ensure that the community was continuously informed throughout the process. Notice of the public meetings was provided to the

public through flyers sent home by the schools with the students, the Board’s (ARC) website, and advertisements in local community newspapers (Appendix ##). All public meeting notices included the date, time, location, purpose, contact name and number.

3.6 Community Input

Community input was an integral part of the Accommodation Review process. Throughout the entire process the public was encouraged to share their ideas and comments through email,voicemail and through the question/answer period at all of the public meetings. Members of the community were also welcome to attend all working group meetings as observers of the process. The community voice was heard and the recommendations that follow most closely align with the feedback the ARC received.

4.0 Staff Recommended Option

As outlined in the Ministry of Education Pupil Accommodation Review Guideline (Appendix ##), the Hamilton-Wentworth District School Board presented an alternative accommodation option which addressed the objectives and Reference Criteria as outlined in the Terms of Reference.

The option proposed by Board staff included the closure of Prince Philip elementary school in June 2012 and the relocation of those students to G.R. Allan beginning in September 2012 (Appendix ##). The staff recommendation also proposed the following upgrades to the remaining two facilities:

Dalewood	G.R. Allan
Renovations to classrooms	8 Classroom Addition 4 New ELP Classrooms (Remove all classes from basement)
Book Room	Book Room
Elevator	Elevator
Accessible Washroom	Accessible Washroom
Larger Staff and Work Room	Larger Staff and Work Room
New Gymnasium (pending decision from City of Hamilton)	2 nd General Purpose Room (Gymnasium)
	2 nd Floor Washrooms
	Additional Resource Room and Special Education Room

~~*Note: The initial option presented included an 8 classroom addition. A revised 3 classroom addition was presented at the last public meeting on October 19, 2011. With the removal of classrooms to accommodate an elevator, 2nd floor~~

~~washrooms and the removal of the basement classrooms, there is a net loss of one classroom on the GRA site, post consolidation.~~

4.1 Rationale and Supporting Data for Staff Recommendation

The board considered grade structure, balancing site and program enrolment, size and viability of each site, and geographic features and natural barriers. Enrolment data predicted a decline of 16% resulting in 273 surplus pupil places by 2020. The FCI was also projected to increase at all facilities over the next 10 years as seen in the table below.

Table X: Dalewood ARC Enrolment Projections and FCI Trends, 2009-2020

School	2009 OTG Capacity	2009 Enrolment Projections (% Utilization)	2020 Enrolment Projections (% Utilization)	Current FCI	10 yr. FCI
Dalewood	392	380 (97%)	297 (76%)	46%	63%
GR Allan	498	471 (94%)	345 (69%)	46%	66%
Prince Phillip	233	188 (81%)	208 (89%)	55%	67%
Total	1,123	1,038 (92%)	850 (76%)		

The enrolment projections were converted into required classrooms to determine the sizing of the addition at the GR Allan site to accommodate the Prince Phillip students as seen in the below table.

Based on calculation of enrolment projections and the size of the proposed G R Allan build , we anticipate G R Allan site will not have the required classrooms to accommodate the students which will require portables on an already reduced outdoor play area. Refer to table # below

DELETE: Table X: Staff Option Classroom Requirement Summary for 2013 and 2020

	2012/2013			2020/2021		
	K	Gr 1+	Total	K	Gr 1+	Total
Required	7	41	48	7	36	43
Available	2	39	41	2	39	41
Difference	5	2	7	5	-3	2

Notes:

1. Spec Ed and Resource included in Grade 1+
2. Mandarin included into K and Grade 1+

The renovation cost associated with the staff recommendation ~~in the above chart~~ was originally estimated at **\$5,289,591**. The most recent revised estimate is \$5,839,591. There would also be increased annual transportation cost of \$80k to \$120k required to transport the 138 additional students eligible for transportation. **The revised estimate includes the costs of the accessibility to current building code (elevator).**

The recommendation provided by staff would require additional funding which would partially be offset through Full Day Kindergarten (FDK) funding (\$1,720,416) and the proceeds of disposition from the sale of the Prince Philip site (\$2,164,591). An additional funding request would have to be submitted to the Ministry of Education as part of the Board's annual capital priorities submission requesting the balance of funds (\$3,675,000). For original costs provided at WG #1 see Appendix ##

5.0 ARC Recommendations

The Dalewood Accommodation Review Committee seriously reviewed, considered, and analyzed the information provided by the HWDSB staff, community members, and expert opinion. Based on careful deliberation, the Dalewood ARC recommends that:

- a) All three of the schools identified in the Dalewood ARC remain open and their existing grade structure and program offering remain intact (Map #1). The approval of this recommendation was achieved through a consensus vote at Working Group Meeting #7 (Appendix ##). This is a cost effective option that protects the distinct healthy walkable communities within the ARC, and is most responsive to the data considered and the input received from the community.
- b. The Board explore with the Ministry of Education the ability to reclassify or remove the classrooms in the basement of G.R. Allan from the SFIS database, when the classrooms are no longer required as teaching spaces, as they are a suboptimal learning environment due to noise.
- c. The board support capital investment to maintain all three facilities. The board has not placed priority on the renewal needs of Dalewood and Prince Phillip, as these schools have not been considered viable by the board. The shadow of the PTR designations continues to affect renewal priority. The ARC committee recommends this practice cease as the evidence supports long term viability for all three schools.
- d. The Board of Trustees consider the following recommended upgrades to Dalewood and G.R. Allan when making their final decision.

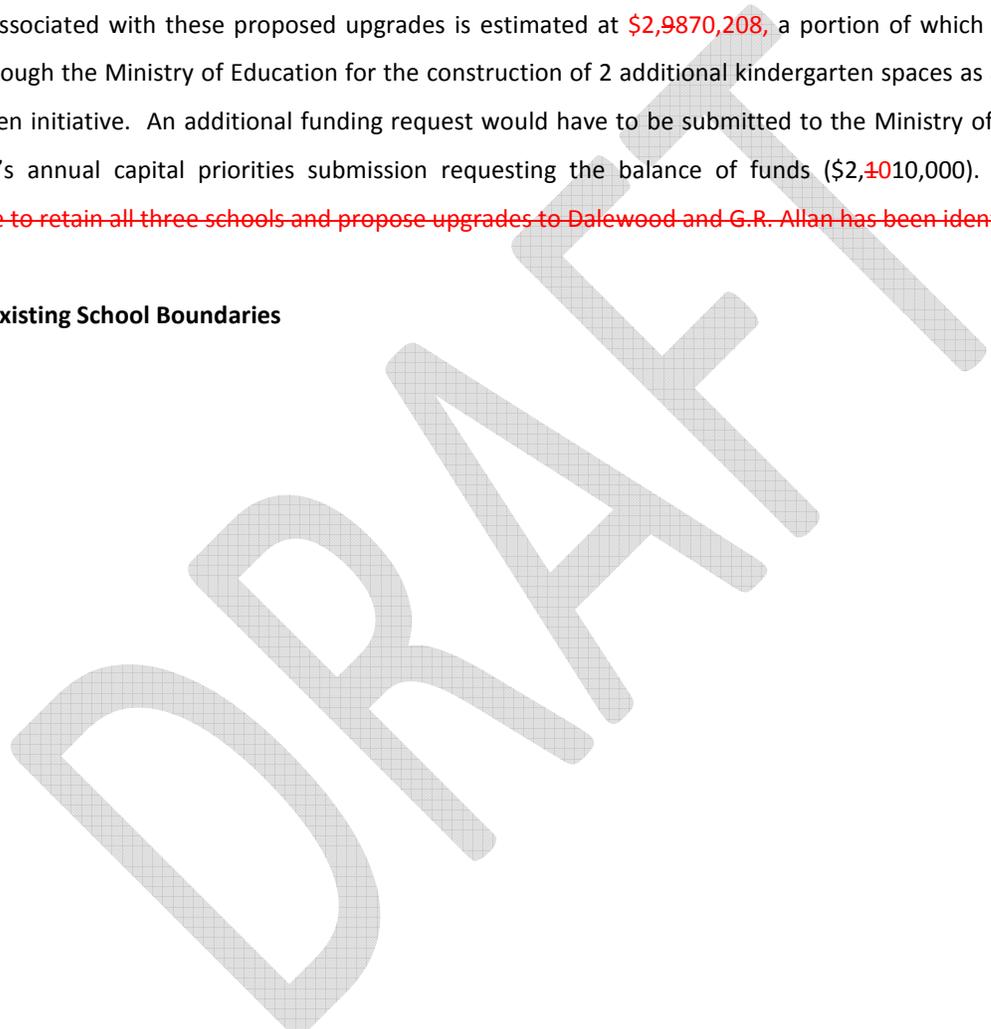
Dalewood	G.R. Allan
Elevator	Elevator

Larger staff and work room	Larger staff/work room OR Book room
Book room	Accessible washroom
Accessible washroom	2 nd Floor washroom

e. The Board of Trustees review revised enrolment projections based on Oct 31 2011 enrolment data, Mandarin program maturation and Special Education capacities (see page 21 Table X)

The cost associated with these proposed upgrades is estimated at \$2,9870,208, a portion of which (\$860,208) would be funded through the Ministry of Education for the construction of 2 additional kindergarten spaces as a result of its full-day kindergarten initiative. An additional funding request would have to be submitted to the Ministry of Education as part of the Board’s annual capital priorities submission requesting the balance of funds (\$2,1010,000). ~~The desire of the Committee to retain all three schools and propose upgrades to Dalewood and G.R. Allan has been identified as Option #11.~~

Map #1: Existing School Boundaries



5.1ARC Recommended Option Rationale and Additional Considerations

The Dalewood ARC had developed and analyzed a total of 13 possible options prior to recommending that maintaining all three schools was the best course of action for the community. The other options developed by the ARC included:

- Closing all schools and building a new “super school”
- Consolidating the three schools into two of the existing schools considering all sites, program offerings and grade models
- Consolidating with local partners to optimize building utilization.

A number of factors made it possible to dismiss many of these options very early on including grade structure, the possibility of split grades due to low enrolments, limited land available at each site, and hard geographical boundaries which make re-distribution of catchment areas unpalatable as well as the financial impact. The ARC committee presented two final options at the third public meeting, namely, the staff option and maintaining all three schools.

After thorough examination, the ARC concluded that the data provided did not support the consolidation of any of the three schools. Upon examination of the facility condition data and enrolment projections, the committee feels that the three schools are required to support student achievement in the Hamilton West community. The rationale and supporting data is outlined below. The data and rationale for dismissing the staff option follows the ARC rationale.

a. Facility Condition

As presented above, the condition of a facility is measured by an index referred to as the Facility Condition Index or FCI. The index is calculated based on a ratio of renewal cost as provided by data contained within the ReCAPP database and an assumed building square foot replacement cost of \$150 per square foot. The committee has been unable to determine the actual renewal costs within the three buildings as the ReCAPP data provides a life cycle flag for repair which differs from actual need or board deemed priority as per the capital submission process.

This data is then used by the staff as a guide for inspection, not replacement. These renewal needs have undergone considerable reassessment during the course of the ARC, and while they do provide a helpful point of analysis for a statistical understanding of the potential liabilities of the board, they are not as useful when attempting to estimate renewal needs in the short and medium term. The MOE has recognized the limitations of using the ReCAPP data as a measure of facility condition and plans to refine the database methodology within the next few years. It is the Committee's understanding that the ~~Board staff~~ Ministry will be undertaking a detailed review of the condition of all ~~board these three~~ facilities over the next five years which may lead to a further change in the facility condition index.

The board has allocated \$1.4M in capital repairs from 2000 to 2010 to all three schools with less than 70k and \$120k spent on Dalewood and Prince Phillip; respectively. The designation of the aforementioned schools as PTR or "Prohibitive to Repair" ~~accounts for~~ contributed to the lack of capital investment until this designation was eliminated in 2007. However, the schools continue to ~~suffer wither~~ under the shadow of potential school closure.

The Dalewood ARC has a recommended option that includes a number of upgrades to Dalewood and G.R. Allan to enhance the facility condition. These proposed upgrades have been summarized in Section 4.0. The cost, as provided by the ARC staff, required to address the current and projected renewal needs at the three schools has been summarized in the following table:

Estimated Renewal Needs	2010	2010 FCI	2020	2020 FCI
Dalewood	\$4,052,092	46%	\$5,604,073	63%
Prince Phillip	\$2,629,624	55%	\$3,210,836	67%
G.R. Allan	\$3,355,301	46%	\$4,847,054	66%
TOTAL	\$10,037,017		\$13,661,963	

The ARC does not accept the validity of these figures, which, as noted above include the replacement value for components of the school that may need replacing for years or decades. Not until a thorough assessment of each ~~facilities facility~~ is completed, will the actual cost of renewal needs be known. Consequently, these estimates did not play a large factor in the ARC's decision, as it was determined the cost of construction involved in the board's option far exceeded what the actual renewal costs would likely be. For a point of reference, note the actual renewal costs at Prince Phillip for the last 10 years have been \$120,531. (See "Budget Report - Capital Expenses, From 2000 to 2010" in the June 8, 2011 presentations.)

Therefore, the ARC finds these costs most significant, taken from the "Dalewood ARC Staff Presentation Oct 12, 2011."

Financial Impact of Options

CONSTRUCTION	HWDSB Staff Recommendation	Dalewood ARC Recommendation
New School Construction or renovation at existing schools	\$ 4,864,591	\$ 1,810,208
Parkland dedication	\$ 25,000	\$ 10,000
PROGRAM TOTAL	\$ 400,000	\$ 500,000
SUBTOTAL CONSTRUCTION	\$ 5,289,591	\$ 2,320,208

UPGRADES	HWDSB Staff Recommendation	Dalewood ARC Recommendation
Estimated costs for Accessibility to Current Building Code	\$ 550,000*1	\$ 550,000 *1 *2
SUBTOTAL UPGRADES	\$ 550,000	\$ 550,000
TOTAL CONSTRUCTION AND UPGRADES	\$5,839,591	\$ 2,870,208
FUNDING OFFSETS	HWDSB Staff Recommendation	Dalewood ARC Recommendation
Less Ministry of Education proposed year 4 FDK funding	- \$ 1,720,416	- \$ 860,208
Less estimated proceeds of disposition	- \$ 2,164,000	
OFFSET SUBTOTAL	- \$ 3,884,416	- \$ 860,208
BALANCE TO FUND*3	\$ 1,955,175	\$ 2,010,000
Less Potential Ministry of Education Capital Funding (Subject to Ministry of Education approval) *	- \$ 2,444,175	- \$ 950,000
Potential subtotal	\$ (-489,000)	\$ 1,060,000

*1 A portion of legacy costs for asbestos removal would likely be required.

*2 Prince Philip accessibility upgrades not included

*3The ARC finds it unlikely that Ministry funding will be received, given that in the past year the ministry received \$4.47 billion dollars in requests for capital funding, but only paid out \$370600million that was not associated with specific capital priorities (i.e. full day kindergarten) or self-funded. In other words, ~~8.3%~~13.4% of the costs requested were granted.

If the Board of Trustees approves the recommendation to keep all three schools open without the requested upgrades, the Dalewood ARC option is significantly more cost effective than the staff recommendation.

DELETE:

ADDITIONAL COSTS IDENTIFIED AS RENEWAL NEEDS

RENEWAL NEEDS (of Questionable certainty)	HWDSB Staff Recommendation	Dalewood ARC Recommendation (#11)
Estimated renewal costs to meet student objectives and asbestos (not program)	\$ 5,741,673	\$ 7,427,805
Estimated costs Remaining Renewal (not identified as critical)	\$ 1,865,720	\$ 2,809,212
SUBTOTAL	\$ 7,598,393	\$ 10,237,017
TOTAL	\$ 7,612,393	\$ 12,101,017

~~As noted above, everything past the "BALANCE TO FUND**" line has not been accepted as accurate by the ARC committee, and therefore we expect the actual cost difference to be \$355,825. In other words, even with the sale of Prince Phillip, the ARC option is approximately the same cost as the board option, before transportation costs are factored in. While transportation is a separate line item within the MOE funding model, the estimated \$80-\$120,000 per year of additional transportation costs must be factored into the staff option.~~

~~The ARC was unable to evaluate operating expense variances as this information was not provided. **because this information is difficult to project.**~~

b. Accommodation and Enrolment

The ARC has recommended that all three schools remain open and continue to operate with the same program offerings and grade structure. While the ARC was established, in part, by the predicted decline of 16% in enrolment figures by 2020, a review of previous enrolment projections by the Board do not lend confidence to the numbers. In a 1998-1999 HWDSB Accommodation report, the following numbers were projected for schools in the Dalewood ARC. Even the most current projections are not borne out.

Table X: 2003 City West Accommodation Strategy Enrolment Projection Comparison

School	2008 projected (from 1999)	2009 actual
G.R. Allan	247	471
Prince Philip	279	188
Dalewood	308	380

The enrolment projections provided by the board staff considered many variables such as historical trends, grade retention, out of catchment policy changes, and the impact of the Dundana FI program. The October 31, 2011 enrolment data was reviewed and revealed that the initial assumptions were extremely conservative and may in fact underestimate short and long term enrolment. Revised projections were not available by the staff based on more recent data due to the time constraints of the ARC process and the data vetting requirements. For this reason, the ARC has recommended that the projections be revised to reflect the current trends. It is also recommended that the following presumptions be considered:

- a) The waitlist and refusal rate for the Mandarin program are indicative of a program in demand. The capacity for this program will be limited by the MOE primary and FDK class size guidelines of 20 and 26; respectively. A fully mature program should comprise of between 75-85 children [i.e. JK-3 with 13-15 children per grade]. This would be an increase of 30-40 pupil places at Prince Phillip. The grades 4-8 retention rates need to be more fully explored. The current families could be sampled to provide a more robust retention rate. Currently, it is assumed that 25% would remain at Prince Phillip.
- b) The Gifted, Systems Communication, and SLP **Special Education programs** have a program cap of 50, 12 and 12; respectively. Historical trends and current enrolment reveal a 95 or greater% enrolment. The projections should assume between 95 and 100%. The current projections assume 90%.
- c) Out of Catchment English registration is condoned by the current HWDSB policy which states that “a principal may consider OOC requests and register students who are requesting OOC consideration if spaces exist within school.” The policy further states that once registration is accepted, a place is provided until secondary school where a new application is required. The FI program is however closed to OOC registration. The long term enrolment projections assume all OOC students will be eliminated. If the short and long term projections are assumed to decline, the elimination of English OOC is inconsistent with board policy and accepted practice in other schools in the Hamilton-Wentworth district.
- d) The impact of the FI program at Dundana has been almost fully realized. The current out of catchment FI students reside in Hamilton and other neighbouring cities. This trend needs to be examined.
- e) Many initiatives are being undertaken by the City of Hamilton and local businesses, including the health care facilities, to attract families to Westdale and **Ainslie Wood**. The projections need to consider population in flow as this is not currently reflected in the projection methodology. Although it will be difficult to quantify, the increase in enrolment at both GR Allan and Dalewood across grades may in fact reflect in flow or secondary migration.

It is the hope of the committee that the below table will be able to be completed to allow for a more current view of enrolment trends.

Table X: Enrolment Projection Comparison

Current Situation	OTG Capacity	Actual 2010/2011	Actual 2011/2012 [% Utilization]	Initial 2012/2013 Projection	Revised 2012/2013	Initial 2020/2021	Revised 2020/2021

		[% Utilization]				
Dalewood						
English (Grd. 6-8)		268	266	244		183
French Immersion (Grd. 6-8)		109	105	115		93
Dalewood TOTAL	392	377 [96%]	371[95%]	359[92%]		276[70%]
G.R. Allan						
English (Grd. JK-5)		220	230	178		120
French Immersion (Grd. SK-5)		239	226	236		225
G.R. Allan Total	498	459 [92%]	460[92%]	414[83%]		345[69%]
Prince Phillip						
English (Grd. JK-5)		154	152	150		149
Mandarin (Grd. JK-3)		29	40	44		45
Prince Phillip TOTAL	233	183[78%]	192[82%]	194[83%]		209[90%]
TOTAL	1,123	1019 [91%]	1,021[91%]	967[86%]		830[74%]

c. Capacity

As previously noted, while the Ministry of Education looks for 100% on-the-ground capacity in schools, **however** this inevitably means portables in any school that meets this objective. Currently, Dalewood sits at 95% capacity and has two portables. G.R. Allan sits at 92% without portables, but utilizes its two special education and resource rooms as teaching spaces. The ARC believes that any excess capacity in the schools can be dealt with by removing the suboptimal classroom spaces and adding elevators to G. R. Allan and Dalewood, which will be required under the province's new Accessibility legislation as soon as a parent **requests** that their child be accommodated. As well, G.R. Allan requires an additional bathroom on the second floor, which would further reduce a classroom space in that school.

Furthermore, the ability for our elementary schools to reach 100% capacity is limited by the MOE primary program cap. The MOE directive is that 90% of primary classrooms must have 20 students or less. This is incongruent with SFIS primary classroom loading of 23 students.

(d) Program

The ARC recommends that the programs currently offered at the schools continue to be offered, including the **programs of choice, such as the** Mandarin program at Prince Phillip.

An important part of the ARC recommendation is to continue to have Dalewood School operate as a grade 6-8 middle school. The committee discovered during this process that because the school is medium sized in population and is

concentrated around three grades, programming possibilities are greatly enhanced. Teachers can team teach more effectively with multiple classes per grade and specialized programming can occur much more easily and effectively than in larger JK-8 schools.

Also, the Dalewood building with the purposed built classrooms for science, music, art, and an auditorium for drama and musical productions provide both the AinslieWood and Westdale communities with tremendous opportunities for our children, opportunities that are not always found at JK-8 schools. We recognize that these specialized learning environments are significant assets to the building and programming at Dalewood and something that would not be built in a new school. The committee was also impressed with transitioning programs that exist for grade 5 students at Prince Philip and George R. Allan moving to Dalewood and for grade 8 students at Dalewood moving into secondary school.

When we presented our opinions at the public meeting, we received a strong show of support from the public to keep the middle school model. The public agreed that Dalewood Middle School provides programming and opportunities for our children that are significant and unique, and that this model serves both communities very well.

While the Committee accepts that the program balance between English and French Immersion at G.R. Allan may be lost due to the increasing popularity of the FI program, it finds that this imbalance is corrected by keeping Prince Phillip open as an English only school. The imbalance is rectified at Dalewood, when both JK-5 schools send their children to the same school for grade 6-8. If Prince Phillip were to be closed, and the current trend of 65% of students choosing the FI program in a dual track school continues, then the projected program imbalance for G.R. Allan would continue at both G.R. Allan and Dalewood. Parents choosing a local, walkable school over the French Immersion program may choose FI if the only option is a dual track school. However, it is important to note that the October 31, 2011 enrolment data reveals that the programs are essentially in balance with a FI to English ratio of 0.98, where one would be an equal number of English and FI students.

	Dalewood FI	Dalewood ENG	GRA FI	GRA ENG
2009 program enrolments	25%	75%	52%	48%
2020 projected enrolments	31%	69%	65%	35%
projected enrolments if Prince Phillip is closed	65%	35%	65%	35%

The practice of school consolidation to “right size” programs has not been a successful strategy in the HWDSB as seen at Earl Kitchener. In June 2002, Allenby and Earl Kitchener [EK] elementary schools consolidated. Allenby was a single track

English school of 125 students while EK was a dual track English and French Immersion School of 300 students [approximately 200 FI and 100 English]. The French Immersion to English student ratio was 0.89, relatively balanced. In 2011, the ratio has climbed to 2.33, a significant FI imbalance (more than twice the number of FI students enrolled). The imbalance of students in dual track FI schools has been identified by the HWDSB and they are currently seeking public input for solutions to maintain or enhance program balance

(e) Transportation and walkability

The current walking distances for elementary students is 1.0km for grades JK/SK and 1.6km for grades 1-8. The proposed ARC option to retain all three schools along with their existing grade structure and program offerings would have no impact on transportation. The current overall percentage of students within walking distance and within catchment to these schools is 83%. If PrincePhilip were to be closed, the overall percentage of students walking within catchment would decrease to 63%.

The committee received a presentation from Antonio Paez, from the School of Geography and Earth Sciences at McMaster University. Mr.Paez identified several reasons to maintain walkable school communities, most notably:

- Walking causes the students to receive an additional 30 to 40 minutes of exercise per day. This is better for their health and supports the Board's recognition of the value of Daily Physical Activity.
- Better health results in better academic performance (Hillman et al. 2009; Tomporowski et al., 2008; Chomitz et al. 2008).
- Transportation choices during childhood influence choices in adulthood. ("Future escalation of the negative consequences of car usage," Johanson, 2005.)
- Community building occurs as people interact on the way to and from school creating greater social cohesion and safety.

Additionally, the current traffic congestion at G.R. Allan would become worse if all of Prince Phillip were attending there as well, due to increased car and bus traffic. **Local walkable schools become a community of their own where parental engagement can be encouraged and supported. George R. Allan for example has a history of intense parental support and volunteerism.**

(e) Funding

Although no additional funding will be required to initiate the proposed ARC option, the Committee has recommended that the Board of Trustees consider a number of upgrades to the existing facilities. The cost of the proposed upgrades along with a funding strategy has been summarized in this report.

Due to the physical connection with the Dalewood Recreation Centre, Dalewood would be an ideal candidate for cost sharing initiatives with the City and or other community partnerships. Cost sharing efficiencies for the proposed renovations at Dalewood could be realized if/when the city begins renovations of the Recreational centre. This would also be a germane time to review the terms of the agreement between the City and the board for shared use of the pool and gym. The City of Hamilton has already directed staff to submit the Dalewood Recreation Centre Renewal project for consideration within the 10-year Capital budget program in September 2010. The report recommended that “Given the deteriorating condition of Dalewood Recreation Centre (built in 1965; shared with a school; and with a current Capital backlog of \$693,167), a replacement community centre should be developed. The new facility should consist of seniors’ and youth space, an indoor pool, and programming and activity space. Consideration should be given to locating the facility at the existing site or another preferred site in the vicinity.” City Councillor Brian McHattie publically supported the recreation centre remaining on the Dalewood site as a shared facility.

(f) Implementation

An implementation timeline is not required under the ARC option as the Committee is recommending that all three schools remain open and continue with their existing program offerings and grade structure. The decommissioning of classrooms at G.R. Allan for a book room and washrooms could happen when these classrooms are no longer required.

(g) Scope

The schools identified in the Terms of Reference include: Dalewood – Prince Philip – G.R. Allan. The ARC does not recommend the consolidation of any of the three schools or changes to the existing boundaries.

(h) Timeline

The final ARC report was submitted to the Director of Education on Friday, December 2, 2011.

6.0 Issues and Concerns with Proposed Staff Recommendation

The ARC committee evaluated the Board option with much rigour and after much consideration; it was deemed not a suitable or a superior option to maintaining the three schools. The rationale, issues, and concerns are outlined below.

The ARC option rationale outlines in detail the issues related to the data errors upon which the ARC was initiated and the concern regarding the accuracy of the enrolment projections, the measure of facility condition and funding assumptions

utilized in the staff option. This section will consider the consolidated GR Allan site classroom sizing, the implementation timeframe, and playground green and asphalt impacts.

Short and Long Term GRA Allan School Sizing Issues

The staff option considered the consolidated pupil places and converted this into required classrooms to determine the sizing of the addition at the GR Allan site to accommodate the Prince Phillip students [Appendix X : Dalewood ARC Boundary Options - Classroom Requirement Summary (2012/13) and 2020/21]. The classroom requirements do not appear to account for a Mandarin FDK room or classrooms loss due to proposed renovations; namely the addition of second floor washrooms and an elevator and the removal of classrooms in the basement. The staff option proposed 4 additional FDK rooms as two already exist at the GR Allan site. The six classrooms are required for 2 FI rooms and 4 English rooms. The Mandarin program appears to be accounted for within the Grade 1+ count. If this interpretation is correct, an additional FDK classroom would be required at the consolidated GR Allan site.

The proposed renovations (adding second floor washrooms, eliminating the basement classrooms and building an elevator) would remove four classrooms from the facility inventory from the GR Allan site. The available grade 1+ classrooms would be reduced to 35 with GR Allan declining from 23 to 19 classrooms. The staff option classroom requirement summary outlined below reveals that 41 classrooms would be required within one year of consolidation. The short term classroom shortfall is six while only three new classrooms are proposed. The long term shortfall indicates that at least two portables will be required. It is also important to note that the existing computer lab at GR Allan will be eliminated to be utilized as a classroom.

The impacts of the proposed changes at Dalewood have not been discussed and therefore are not quantified. The addition of an elevator, larger staff and work room and book room may reduce the classroom inventory at Dalewood.

During the course of the ARC process, members learned from Board staff that, while the Ministry seeks 100% on-the-ground capacity, in reality any school above 90% capacity will require portables to ensure appropriate programming space. Given this, additional portables at the G.R. Allan site should be expected far into the future.

Table X: Staff Option Classroom Requirement Summary for 2013 and 2020

	2012/2013			2020/2021		
	K	Gr 1+	Total	K	Gr 1+	Total
Required	7	41	48	7	36	43
Available	2	39	41	2	39	41
Difference	5	2	7	5	-3	2

Notes:

1. Spec Ed and Resource included in Grade 1+
2. Mandarin included into K and Grade 1+

The timing of the consolidation has not been discussed in great detail but the enrolment projections and classroom availability data would suggest that consolidation may not be feasible until sometime after 2015.

Playground Space Impact

The proposed GR Allan consolidated site plan, as presented at Public Meeting #4, reveals that the footprint of the new building will be 27, 595 sqft or 15.8% of the four acre site. The new additions account for an increased building footprint of 9,000 square feet. The addition of the general purpose room will reduce the green space by 3,000 square feet while the addition of the classrooms will require the relocation of the Kindergarten play space. The kindergarten play ground is 9,000 square feet. It has been suggested that this could be relocated to the front of the school which would reduce the green space by 9,000 square feet. This would then reduce the site green space by 12, 000 square feet. It is also important to note that 22% of the green space is in front of the school.

The school consolidation will also reduce the asphalt playground as each classroom requires 1.25 parking spaces. The current parking lot would need to be increased by 1,000 square feet to meet this standard with the existing 23 classrooms. The consolidated site would require 29 classroomsparking spaces, adding 2,500 square feet of parking lot asphalt. The asphalt playground would therefore be reduced by 3,500 square feet. The consolidated site plan would then account for a reduction of 15,500 square feet to the site playground.

Although G.R. Allan is bordered by green space in practical terms the space that is used daily for recess, lunch and outdoor activities is the playground surface at the North and West sides of the school. Space is already at a premium with the current enrolment.

It is important to note that fencing, kindergarten playground relocation, and paving expenses have not been included into the board capital estimates.

The Dalewood ARC believes that the HWDSB option to close Prince Philip and consolidate the student body at GR Allan is not a suitable option and asks the Board of Trustees to reject this recommendation. This option relies on inaccurate enrolment projections which are unsupported by current actual numbers and trends as well as inaccurate FCI ratios that are based on ReCapp data and not an actual assessment of the condition of each facilities. The Board option is more expensive without guarantee of adequate funding and comes with the additional annuals costs of transportation for the Prince Philip student and the subsequent traffic congestion at GR Allan school. It will not address the imbalance in the English and French immersion program streams in the long-term, as evidenced in the south west by the consolidation of Allenby and Earl Kitchener Schools.

Given this rationale, the Dalewood ARC supports the rejection of school consolidation in the west Hamilton catchment and urges the Board of Trustees to see the inherent value in our vibrant, healthy schools, which serve as excellent learning environments and community hubs for the students and families in the Westdale and Ainslie Wood neighbourhoods.

7.0 Summary

In January 2011, Trustees of the Hamilton-Wentworth District School Board initiated an Accommodation Review process which included Dalewood, Prince Philip and G.R. Allan elementary schools. The Accommodation Review was initiated by Trustees to address the long-term viability of this group of schools. The ARC recommendation and the Staff option both aim to fulfill the mandate “to provide viable learning programs in quality facilities in a fiscally responsible manner.” The ARC has raised concerns regarding the FCI values that were instrumental in declaring both Dalewood and Prince Philip PTR ensuring that their access to funding has been severely limited for 10 years. The errors in measurement and miscalculation may have played a role in initiating this ARC process. Furthermore, the ARC has grave concerns regarding the demographic projections based on previous predictive accuracy and current enrolment trends.

When considering the value to the student the ARC approached the task from a holistic view point. The positive comments received by the committee in support of neighbourhood schools, smaller school size, social capital, parental involvement, walkability, environmental impacts all were factors that played into the recommendation to maintain all three schools. Current trends in the fields on health and urban planning towards sustainable, walkable neighbourhood development mirror the neighbourhoods that we already have. Families have many choices when deciding on the education of their children and they are continuing to choose these schools for their excellent programs and location.

One notable outcome of the ARC process was the number of community members who took the time to attend the public meetings and write letters to the ARC members to express their appreciation for all three schools. Two independent petitions were signed by more than a thousand local residents supporting the recommendations adopted by the ARC committee. We request that the board give these recommendations serious consideration. The ARC believes that our recommendation supports student achievement requirements which align excellent programming, educators, and facility. The recommendation strongly urges the Board to invest in our three facilities to meet ~~equity and accessibility~~ ~~needs.~~ ~~community needs.~~

8.0 List of Appendices

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The Dalewood ARC recommendation is the best option for four significant reasons:

1. It saves the board money

2. It maintains walkable healthy communities and neighborhood schools

3. It prevents program deterioration due to over-crowding at G.R. Allan

4. It maintains schools that were identified in every way as excellent by the community.

Includes list of all documents in the ARC Binder

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