

**INFORMATION REPORT**

**ITEM 10.4**

**2017-18 PLANNING SERVICES WORK PLAN:  
2018 EDUCATION DEVELOPMENT CHARGES (EDC) BY-LAW  
AND 2018 LONG-TERM CAPITAL PLAN (LTCP)**

**PURPOSE:**

To inform the Board of two (2) major projects being undertaken by Planning Services, and anticipated milestones throughout the 2017-18 school year. The first entails the completion of the new 2018 Education Development Charges (EDC) By-Law. The second entails updating the 15-year Long-Term Capital Plan. Both documents are coming to their 5-year term, and need to be updated for June 2018.

**BACKGROUND INFORMATION:**

- 1) Information Report Item 10.9, "Annual School Accommodation Update Report" from the September 19, 2017 Regular Board Meeting.
- 2) Action Report Item 8.16, "Proposed 2017 Amendment to the 2013 Education Development Charges (EDC) By-Law" from the June 20, 2017 Regular Board Meeting.
- 3) Action Report Item 8.3, "2015 Joint Review of the 2013 Education Development Charges By-Law" from the June 2, 2015 Regular Board Meeting.
- 4) Action Report Item 8.1, "2014 Joint Review of the 2013 Education Development Charges By-Law" from the June 3, 2014 Regular Board Meeting.
- 5) Action Report Item 9.2, "2013-2018 Education Development Charges By-Law" from the June 18, 2013 Regular Board Meeting.
- 6) Action Report 9.5, "Long Term Capital Plan" from the June 18, 2013, Regular Board Meeting.

**BACKGROUND & COMMENTARY:**

As was discussed in the Annual School Accommodation Update Report presented at the September 19, 2017, Regular Meeting of the Board, the Board's 2013 Long-Term Capital Plan and 2013 Education Development Charges By-law will both require a full review by the end of June 2018.

Planning Service will be reporting to the Board over the course of the year on the progress being made on both projects. Note that both projects will be presented to the Community, and will be brought forward for Board approval once they are completed.

The purpose of this report is to provide the Board of Trustees with tentative milestones on when the Planning Services department will be reporting to Trustees, and Community Stakeholders. Detailed calendar dates will be subsequently provided as the process advances over the course of the year.

The following subsections provide for context on both the 2018 Long-Term Capital Plan and the 2018 Education Development Charges By-law.

## 2018 LONG-TERM CAPITAL PLAN UPDATE:

A Long-Term Capital Plan (LTCP) is meant to identify future new capital projects and accommodation review initiatives that a Board will be undertaking over a 15-year period. Future project needs are defined by projected long-term enrolment trends, and anticipated students yielded from new development areas. The plan also reviews the renewal needs of school facilities, and priority areas. The array of recommended projects within an LTCP can include the following:

Capital Projects	Accommodation Reviews
A) New Schools or Consolidation Projects	A) School Boundary Reviews
B) School Permanent Additions	B) School Closures and Consolidations
C) Renewal Projects & Rebuilds	C) Program Distribution

The last LTCP was completed in June of 2013, and was approved in principle by the Board of Trustees. As per the requirements of the Ministry of Education, the plan should be updated by Boards every five (5)-years to ensure it is consistent with changing trends.

**Note that the implementation of the identified projects in the plan were approved under separate resolutions in accordance with the in-effect policies and procedures of the Board.**

To complete the process, Planning Services anticipates to undertake the following actions over the 2017-2018 school year. Milestones include reports and presentations to the Board, Senior Staff, and Community Stakeholders. This information will also be posted on the Board's School Planning website (<https://schoolplanning.hcdsb.org/ltcp/>).

TENTATIVE DATE	FORUM	ACTIONS
<b>October 3, 2017</b>	<b>Board Meeting</b>	<b>Report to Board regarding 2017 Planning Services Work Plan</b>
October-November, 2017	Internal	Develop and complete preliminary enrolment projections for submission to the Ministry of Education
<b>November 24, 2017</b>	<b>Ministry Submission</b>	<b>Memorandum 2017: SB28 Enrolment Projection Submission</b>
<b>December 2017</b>	<b>Board Meeting</b>	<b>LTCP – Preliminary Enrolment Projection Report</b>
December 2017	Notification	LTCP – Notification sent to Community Stakeholders for Enrolment Projection Presentation
January 2018	Online Consultation	Enrolment Projection presentation to public
February 2018	Notification	Notifications sent regarding LTCP – Annual Facility Accommodation Plan Presentation
March 2018	Community Consultation	LTCP – Annual Facility Accommodation Presentation
March 2018	Internal Circulation	Draft LTCP circulated for staff feedback
March 2018	Internal	Draft LTCP revised and completed
<b>April 2018</b>	<b>Board Meeting</b>	<b>LTCP – Annual Facility Accommodation Report</b>
<b>April 2018</b>	<b>Board Meeting</b>	<b>Interim Report for LTCP</b>
April 2018	Notification	Notifications sent regarding LTCP Public Meeting
<b>May 8-11, 2018</b>	<b>Board Meeting</b>	<b>Draft LTCP Public Meeting</b>
<b>June 5, 2018</b>	<b>Board Meeting</b>	<b>Report to Board for finalized LTCP for Approval</b>
June 19, 2018	Board Meeting	Capital Priorities Report to Board

## **2018 EDUCATION DEVELOPMENT CHARGES BY-LAW:**

An Education Development Charge (EDC) is a levy that is imposed under a Board enacted By-Law respecting growth related net education land costs incurred or proposed to be incurred by a School Board over a 15-year period. EDCs are the primary source of funding for the acquisition and preparation of school sites, and other costs related to accommodating growth-related pupil needs within a Board's jurisdiction.

On June 18, 2013, the Board adopted a region-wide 2013 EDC by-law under the Education Act, a joint undertaking with the Halton District School Board (HDSB). The 2013 EDC By-Law had an effective implementation date of June 24, 2013 and can only be in effect for no more than five (5) years.

Since its implementation, the EDC by-law was amended three (3) times to address increasing land values in the Halton Region, and ensure that the deficit is adequately funded.

The by-law will reach its term on June 18, 2018. A new Background Study to update the future land requirements for both the Halton Catholic District School Board and Halton District School Board is required. Watson's and Associates was selected through a Request for Proposal (RFP) process, and will continue to work on behalf of both Boards for matters related to the Education Development Charges By-Law over the term of the 2018 EDC By-law, if approved.

This analysis will be based on, but not limited to, updated land valuations, Region Growth targets and trends, student yields, existing accommodations spaces (surplus vs. deficit). Based on the aforementioned information, a charge for both residential and non-residential uses will be generated.

As the process moves forward, Board staff will continue to report to the Board of Trustees and Community Stakeholders to gather feedback on the By-Law, as shown in the below table.

Staff will also hold in-service sessions with Trustees to allow for an in-depth review of the Background Study protocols, assumptions, methodology, and content. All information will be posted on the Board's website (<https://www.hcdsb.org/Board/EDC/Pages/default.aspx>).

<b>TENTATIVE DATE</b>	<b>FORUM</b>	<b>ACTIONS</b>
October/November 2017	Trustee Meeting	Info Session – EDC Policy (Protocol) Discussion
October/November 2017	Stakeholder Meeting(s)	Info Session – EDC Policy (Protocol) Discussion
<b>November/December 2017</b>	<b>Board Meeting</b>	<b>Information Report – Confirmed EDC Protocols</b>
February/March 2018	Trustee, Community & Stakeholder Meeting(s)	Info Session – Background Report Presentation
<b>March 2018</b>	<b>Board Meeting</b>	<b>Staff Report – 2018 EDC By-law implementation</b>
March 2018	Ministry Submission	Submit Draft Background Report to Ministry of Education
March/April 2018	Notification	EDC Background Study Public Meeting Notification
April 2018	Public Meeting	EDC Background Study Public Meeting & EDC Policy Review public meeting.
<b>May 2018</b>	<b>Board Meeting</b>	<b>Comments and Delegations received</b>
<b>May 2018</b>	<b>Board/Public Meeting</b>	<b>Action Report – 2018 EDC By-law Consideration</b>
May 2018	Notification	Notice of Passing of 2018 EDC By-law
June 2018	-	2018 EDC By-law rates come into effect

## **CONCLUSION:**

The Board's 2013 Long-Term Capital Plan and 2013 Education Development Charges By-law will require a full review and approval and implementation by the end of June 2018.

Planning Service will be reporting to the Board over the course of the year on the progress being made on both projects. Note that both projects will be presented to the community on a number of occurrences, and will be brought forward to the Board for approval once the final proposal is completed.

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**REPORT APPROVED BY:** P. DAWSON, DIRECTOR OF EDUCATION AND SECRETARY OF THE BOARD