

Ministry of Education

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2011: SB7

MEMORANDUM TO: Superintendents of Plant
School Business Officials
Secretary-Treasurers of School Authorities

FROM: Nancy Whynot
Director, Capital Programs Branch

DATE: **March 29, 2011**

SUBJECT: **Implementation Information for the Condition
Assessment Program for Education Facilities**

On January 21, 2011, the Ministry issued memorandum **2011:SB01** to announce that Altus was the successful vendor in the recently completed competitive procurement of services for the Condition Assessment Program for Education Facilities in Ontario. Altus will provide all asset management database services, including training and support, through its proprietary software, TCPS[®] (Total Capital Planning Solution), and manage the facility condition assessment services provided by its partner, Stantec.

The Ministry expects that this program will provide accurate, independent and consistent facility condition data. This data will be used by school boards (including school authorities) and the Ministry to assess renewal needs and plan renewal investment, projects and programs. The Ministry expects that TCPS[®] will be used by boards to create and track board capital programs and to report on spending related to specific renewal programs. The Ministry will also continue to require that renewal program spending be reported in TCPS[®].

The purpose of this memorandum is to provide information about:

- key activities and timelines associated with the implementation of the program over the next several months

- the conversion process to TCPS® including:
 - specific actions to be taken by boards prior to the conversion
 - the web portal to access TCPS®
 - details about the mapping of building and site components from ReCAPP® to TCPS®
 - details about the data bridge from SFIS to TCPS®
 - user training to be provided by Altus
- the facility condition assessment process including:
 - the overall scope and approach
 - board role and preparation
 - high-level information about the scheduling of assessments over the next five years
- funding to boards to cover the annual licensing costs of TCPS®
- contact information

In the weeks ahead, the main communication about this program will begin to be provided by Altus through a new web portal designed specifically for school boards: **www.edu-altus.com**. Altus will send emails to school board facility managers with web portal information shortly. Boards will be expected to visit the portal, which will also be the access point to TCPS®, on a regular basis to receive updates. Many details related to issues raised in this memo will be available on the web portal.

Ensuring a successful program

To be successful, this condition assessment program requires the active participation of school boards. Already, school board staff have been working to verify and update facility information in SFIS. This work includes removing demolished and sold facilities and ensuring all open and operating schools and owned and operating administration and continuing education facilities are in SFIS. This information is expected to be updated in SFIS by April 8. The Ministry is also providing every school, board administration and continuing education building a unique, permanent building number, which will be visible in SFIS on April 12.

Boards will also be expected: to ensure relevant staff are trained on TCPS®; to work with Altus regarding providing access to TCPS® to relevant staff; to provide appropriate

documentation to the condition assessment teams; and provide qualified staff to work with the teams when they are doing their condition assessments. Prior to the condition assessment at a particular school, boards should update the school component inventory and archive all completed projects in the Capital Project Manager.

The Ministry also expects that school boards ensure information technology resources are in place to support TCPS® so that facilities staff are able to use it efficiently. The Ministry is aware of the challenges regarding Internet connectivity during a typical school day. However, it is the Ministry's expectation that all boards take the necessary steps to ensure that connectivity issues do not hinder the ability of board staff to access TCPS®. Please see Appendix A for more information on the information technology support required.

Contacts

The Ministry is pleased to announce that Sonila Salillari, Senior Director, Client Services at Altus, will serve as the Overall Lead of the condition assessment program. In this role, Sonila will oversee the delivery of all services provided by Altus and Stantec and will serve as the main point of contact with the Ministry.

Altus and Stantec have committed to providing all services in English and French – the default language of delivery will be the official instructional language of each board. A list of key team members and contact information is provided as Appendix B to this memo for your reference.

Funding and Licensing

As has been the practice in recent years, the Ministry will continue to provide annual funding to school boards through the GSN to cover the licensing fees. Funding will cover access to the application for board users, technical and user support, and training. Altus will issue invoices in September of each year to school boards to cover the TCPS® access costs for that school year (e.g. the September 2011 invoice would cover the 2011-12 school year). The first funding amounts are provided in the 2011-12 GSN. School boards will receive their TCPS® license agreements from Altus.

The Ministry will pay Altus directly for all application-related costs prior to August 31, 2011 and for all condition assessments throughout the term of the contract.

TCPS® Asset Management Software Application

Transition to TCPS®

TCPS® is a web-based upgrade of the existing ReCAPP® software being used by boards. TCPS® is accessible over the Internet using standard web browsers. Users will find the core functionality of TCPS® similar to ReCAPP®. TCPS® also offers additional

functionality and capital planning tools that will provide boards with the ability to make effective long-term capital planning decisions. As development continues to enhance the functionality of TCPS® to meet Ministry requirements, the application will be updated once all boards have access to TCPS®.

Altus is preparing to transition existing school board and school authority data in ReCAPP® to TCPS® on a board-by-board basis. It is anticipated that this data conversion will begin in late March and will be completed for all boards and school authorities by June 2011. Altus will notify each board directly of its anticipated data conversion period at least two weeks in advance of the conversion.

Altus has assured the Ministry that there will be no loss of data and interruption of information access of less than a day as a result of the transition from ReCAPP® to TCPS®. Access to ReCAPP® on a read-only basis will continue for about two weeks after conversion to allow board staff to review the data transition.

Updating ReCAPP®

Boards are expected to review and update their ReCAPP® assets prior to the transition to TCPS®. Altus has sent a letter to all school boards with more information about the process. Boards should focus on ensuring their inventory of assets (schools) is up-to-date, including adding new additions and new schools through the Asset Review Tool (ART) process. The Ministry and Altus always encourage boards to update project information, including marking building components and events for deletion. This work should continue in advance of the conversion. Altus is scheduling training sessions on preparing for conversion. Information on the training and data updating can be found on the existing ReCAPP® website www.altuscapitalplanning.com or the new web portal.

Access

Boards will access TCPS® through the web portal. Staff will be able to access data for their board's facilities only (with the exception of any facilities shared with other boards). Each board will have an administrative user with authority to set up other accounts. There will be five types of users with varying capabilities to input and edit data, read data and create and run reports. **School boards are asked to provide primary and alternate contact names for TCPS® to assist Altus with the transition process. This information should be sent by email to Sazan Bimo at Altus at sazan.bimo@altusgroup.com by April 4, 2011.** Altus will provide further information to boards with instructions on how to set up user accounts and passwords for board staff to access TCPS®.

Component Mapping

Altus is mapping its existing ReCAPP® building and site component structure details to the Unifomat II building and site component structure in TCPS®. In most cases, this mapping preserves existing asset and renewal event details. There are instances where

the configuration to Unifomat II results in changes to where information is kept in TCPS®. In addition, existing narratives are combined into one narrative box at the asset level with read-only access. Altus will provide additional information on the TCPS® web portal on the component mapping process.

SFIS Data Bridge

It is critical that boards continue to keep their SFIS information up-to-date.

The Ministry is working with Altus to create a bridge from SFIS to TCPS® to allow for the one-way transfer of data into TCPS®. This bridge will allow core data – including building address, gross floor area, age, panel - from SFIS to be loaded into TCPS®, and then to be updated weekly. Records in TCPS® will be based on the building and the new Ministry Building Identification Number. SFIS numbers and related information will be mapped to the appropriate Building Number. For the vast majority of facilities where there is one SFIS number in a building, the SFIS information will be the building information. For buildings with multiple SFIS numbers, the information for each SFIS number will be compiled in a table in the building record, and, where possible, it will be applied to the building.

Training

Altus will be scheduling training sessions in French and English over the next few months consisting of webinars for existing ReCAPP® users and in-class sessions largely for new users at Altus offices in the Greater Toronto Area. Altus will also offer regional initial training sessions in the near future and will provide more details directly to boards through the new web portal.

Facility Condition Assessments

Scope and Approach

Over the term of the five-year contract, there will be condition assessments of education facilities, five-years-old or older, that are owned or co-owned by boards and that are expected to remain open and operating for the next ten years. Leased schools needed for the long-term will also be assessed. Eligible facilities are all school facilities (including those leased and needed for the long-term), all stand-alone board-owned continuing education facilities that are not captured otherwise as open and operating schools, and one administration facility per board. Closed facilities and facilities newer than five years old will not be assessed in the first five years.

The assessments will include the entire education facility, except for parts of a facility that are owned by a party other than a board (e.g. a municipally-owned and operated library that is included in the building envelope). The exception is childcare: all childcare facilities within the building envelope will be assessed. Generally, two types of assessments will be conducted depending on the age of the original portion of a facility.

Full condition assessments will be conducted at all facilities eight years of age and older, while new facility condition assessments, which will be less comprehensive, will be conducted on facilities between five and seven years of age.

The assessments will be non-invasive and will generally only include permanent space, including any space integrated into the building envelope. Portables and portapaks will not be assessed. The assessments are intended to address structures and systems that are critical to the integrity of the function of the building or site. At the request of the Ministry, they will undertake energy and accessibility checklists.

Assessments of the functionality of space to meet program needs for the delivery of certain types of classroom instruction are not included in the scope of this contract. However, boards will have the opportunity to enter data in TCPS® about specific program spaces (e.g. the dimensions of school gymnasias) in order to track this information. The assessment teams are not responsible for assessing a facility against the current building code, but will note any violations when detected.

Assessors will be conducting spot checks at some schools of major renewal work recently completed by a board and funded through a Ministry capital program. In the first two years, the focus will be on Good Places to Learn-funded renewal projects. This is not an audit, but another way for the Ministry to confirm the successful implementation of the GPL program.

Stantec will ensure that all of its assessment teams use a consistent methodology for conducting the assessments and transmitting all findings into TCPS®. Each assessment team will be comprised of two or three members, and will include certified staff with assessment experience in the areas of electrical systems, mechanical systems, and building sciences.

Process

Altus and Stantec have conducted pilot condition assessments at three school boards and have reviewed feedback with the Ministry and the Technical Advisory Group of school board officials. As a result, the assessment process is being refined to deliver better results for the Ministry and boards.

There is a standard list of documents (found in Appendix C) boards are expected to provide to the assessment team prior to the assessment. Boards and school authorities will also be expected to provide knowledgeable staff to discuss the building with the assessment team three to six weeks prior to the assessments. In addition, an appropriate staff member is expected to accompany the assessment team during the assessment and to review the condition assessment reports. On the day of the assessment, if no facility or caretaker staff is available to escort the assessment team then the assessment will not be completed.

To facilitate and oversee the entire condition assessment process, Stantec has designated Cindy Honglin as Project Manager. In addition, Stantec has assigned three province-wide discipline leads in the following areas – electrical, mechanical and building sciences – to provide expert guidance to the assessment teams as required and to assist with ensuring overall quality control.

The Ministry knows that the support of board staff is an additional responsibility for boards, but it will improve the quality of the information collected during the assessments. **Boards and school authorities are asked to provide preferably two contact names for the condition assessment program by email to Cindy Honglin at Stantec at Cindy.Honglin@Stantec.com by April 4, 2011.**

The assessment process, including board preparation best practices, will be outlined in detail so school boards know exactly what to expect. The safety of students and strict adherence to school visitor policies during all assessments are of paramount importance to the Ministry, Altus and Stantec. Any concerns should be reported immediately to Stantec and Altus and the Ministry.

Scheduling

It is anticipated that the condition assessments will begin by May 2011 and that approximately 20% of all eligible facilities will be inspected in each year of the contract. Most boards will have some schools assessed by the end of 2012 and that most mid-size and large boards will have their facilities assessed over several years. Considerations of equity, board staff workload, and travel and accommodation costs also informed the schedule. A high-level five-year schedule attached as Appendix D provides the distribution of facility assessments by board. Boards will have some input into what facilities are assessed in any given years, based on parameters to be provided by Altus.

Evaluation of Vendor Performance

To ensure that school boards and the Ministry obtain the highest possible quality of service from Altus and Stantec during the course of the Condition Assessment Program, the Ministry requires that all school boards complete surveys to evaluate the performance of the vendor in the provision of the following services:

- Quality of the condition assessment performed at each facility
- Quality of draft and final condition assessment report on each facility
- Quality of TCPS® training and user support (annually)

Altus will be responsible for administering the surveys and will inform the Ministry of results. It is critical that all school boards complete these surveys in a timely manner to

allow the Ministry to ensure that the vendors are meeting minimum performance standards. More information will be provided by Altus shortly.

Key Actions and Timelines

- Late March – Online TCPS® training sessions for existing ReCAPP® users begin.
- March/April – Altus to inform boards of tentative schedule for the transition from ReCAPP® to TCPS®.
- April 4 – Boards to send Altus (Sazan.Bimo@AltusGroup.com) primary and secondary contact information for TCPS®.
- April 4 – Boards to send Stantec (Cindy.Honglin@Stantec.com) primary and secondary contact information for the facility condition assessments.
- April 8 – Deadline for SFIS updates.
- April to June - Greater Toronto Area and regional initial in-class training sessions.
- Late March to June – Board-by-board transition from ReCAPP® to TCPS®
- May – Facility condition assessments begin

Ministry Assistance

The Ministry is pleased to be able to support school boards in managing renewal needs through the implementation of the Condition Assessment Program. If you have questions about the Condition Assessment Program, please contact Mathew Thomas, Capital Programs Branch, at (416) 326-9920 or Mathew.P.Thomas@Ontario.ca.

Sincerely,

Original Signed By:

Nancy Whynot
Director,
Capital Programs Branch

cc: Directors of Education

Appendix A:

TCPS 9.6 Application System Requirements for Users

Item	Minimum Requirement	RECOMMENDED Minimum
Processor:	Dual Core – 1.2 GHz	Dual Core – 1.2 or higher GHz
Memory:	2 GB	4 GB
HD Free Space:	200+ MB (depends on the number and size of downloaded AVS files)	200+ MB (depends on the number and size of downloaded AVS files)
Operating System:	Microsoft Windows XP Professional SP3 or Windows 7	Microsoft Windows XP Professional SP3 or Windows 7
WEB Browser:	Microsoft Internet Explorer 6	Microsoft Windows Internet Explorer 8
Video Resolution :	1024 x 768 pixels	1280 x 1024 pixels or higher
Video Memory:	64 MB	128 MB or higher
Internet Connection:	DSL Modem	LAN, DSL or Cable Modem

Internet Speed:

The minimum connection speed for internet access is a DSL modem. Altus Capital Planning recommends a LAN, DSL or Cable Modem with at least 40-50kb/sec of available bandwidth (200kb/sec to 1mb/sec if large photos are stored in the database).

Appendix B

Key Team Members from Altus and Stantec

Below are the key team members for the condition assessment project. Where the key team member is a designated contact person for a particular component of the program, their contact information is provided.

For information about TCPS® (including the conversion process and access), please contact:

Sazan Bimo, Project Manager, Altus: 416.234.4201; Sazan.Bimo@AltusGroup.com

For information about the facility condition assessment process, including documents to be provided and scheduling, please contact:

Cindy Honglin, Project Manager, Facility Assessment and Indoor Environments, Stantec: 905.415.6371; Cindy.Honglin@Stantec.com

Other Contact Names:

Sonila Salillari, Senior Director, Client Services, Altus, and Overall Project Lead: 416.234.4205; Sonila.Salillari@AltusGroup.com

Katia Taillefer (bilingual), Project Manager, Altus: 416.234.4238; Katia.Taillefer@Altusgroup.com.

Bill Roth, Principal, Facility Assessment and Indoor Environments, Stantec: 416.420.8166; Bill.Roth@Stantec.com

Norman Lobo, Associate, Facility Assessment and Indoor Environments, Stantec: 905.415.6387; Norman.Lobo@Stantec.com

For TCPS® user support, please contact:

TCPS Support Line: 1.877.333.3537 or 905.953.9948 ext 2517

Appendix C

Documents for Condition Assessment Preparation

Below, please find the list of documents that boards are expected to provide for each building prior to the condition assessment.

- Floor plans or fire route plan
- Roof plan showing roof sections with the year of last roof replacement
- Inventory of mechanical systems
- Designated Substance Survey (i.e. asbestos or other significant items)
- List of major renewal work completed since the 2002-2003 assessment or since the date of the last assessment
- Any other relevant reports