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Capital Policy and Programs Branch	Direction des politiques et des programmes d'immobilisations	Ontario
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2014: SB5

MEMORANDUM TO:	School Business Officials Superintendents of Facilities
FROM:	Grant Osborn Director Capital Policy and Programs Branch
DATE:	**April 1, 2014**
SUBJECT:	**Condition Assessment Program Update & Guidelines for Entering School Facility Inventory System (SFIS) Data**

This memo is intended to provide boards with an update on the condition assessment program, and rules and procedures relating to SFIS.

HIGHLIGHTS

A. Condition Assessment Program

- 2820 facilities have been assessed to date and 898 are to be assessed in 2014

- TCPS training dates and maintenance/procedural reminders

- All expenditures incurred in the 2011-12 and 2012-13 school years, which were funded through the School Condition Improvement (SCI) program, are to be reported in TCPS by June 30, 2014

B. School Facilities Inventory System (SFIS)

- Update on rules and procedures relating to using SFIS ID numbers

1. Condition Assessment Program

We are pleased to report that over the first three years of the program, 2,820 facilities have been assessed across all 72 school boards. This represents approximately 65% of all facilities that are eligible for assessment.
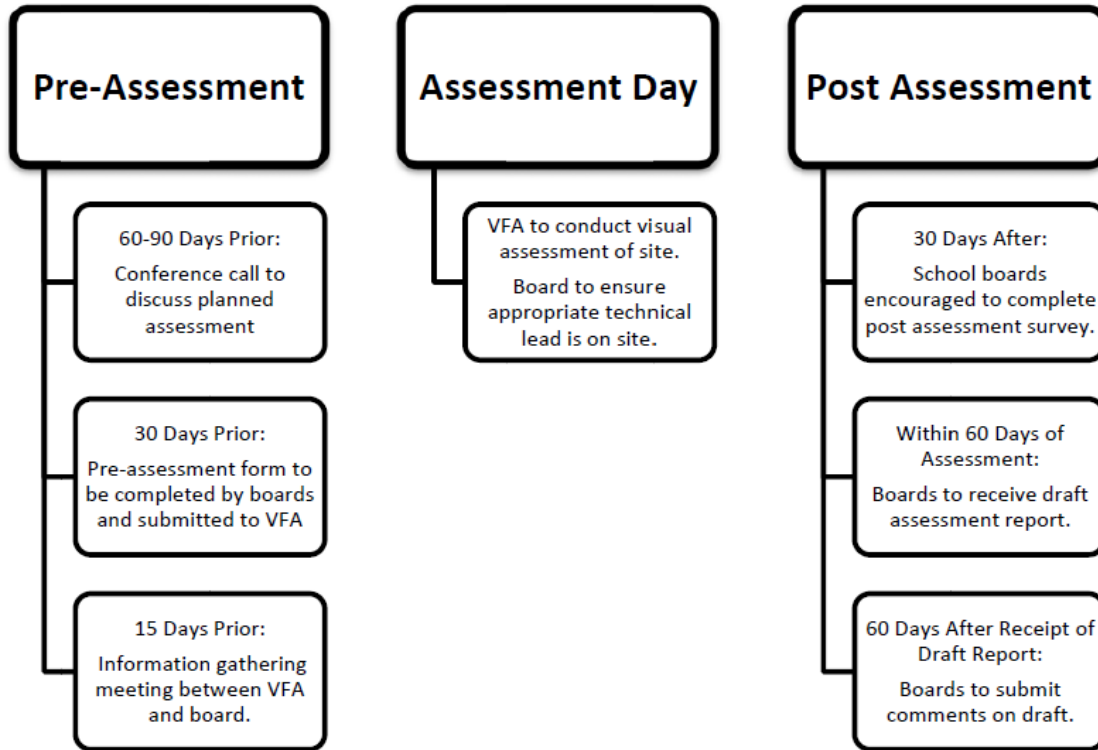
We would like to thank all boards for their ongoing support of this program. This program is a priority for the Ministry, as it provides boards with important data about the condition and renewal needs of facilities that boards should be incorporating into their ongoing capital planning and management. It also assists the Ministry in assessing the state of the infrastructure in the sector with a view to determining the types of investments that will be needed to ensure that all students in the province benefit from safe and healthy learning environments. For these reasons, we encourage boards to not only be actively involved in the condition assessment process but also manage their assets in the Total Capital Planning Solutions (TCPS) database (http://tcps.edu-vfa.com).

2013 Assessments

Over the course of 2013, 932 facilities were assessed. We are in the process of reviewing data collected over this period. Boards are reminded to review and submit comments on their draft assessment reports for facilities within the required 60 day timeframe so that final reports for those assets can be generated. At that point, those assets will be unlocked in TCPS, allowing boards to update renewal events. Boards are also reminded to complete and submit their post-assessment surveys. These surveys are important to the success of the program.

2014 Assessments and Beyond

For 2014, 898 facilities are planned for assessment. The high-level 2014 and 2015 assessment schedule is available in Appendix A. Please note that the number of facilities to be inspected at each board is subject to change and that, as has been the case in other years, not all boards will have facilities assessed in 2014 or 2015. Below is a reminder of key milestones during the assessment process:

Pre-Assessment

60-90 Days Prior: Conference call to discuss planned assessment

30 Days Prior: Pre-assessment form to be completed by boards and submitted to VFA

15 Days Prior: Information gathering meeting between VFA and board.

Assessment Day

VFA to conduct visual assessment of site.

Board to ensure appropriate technical lead is on site.

Post Assessment

30 Days After: School boards encouraged to complete post assessment survey.

Within 60 Days of Assessment: Boards to receive draft assessment report.

60 Days After Receipt of Draft Report: Boards to submit comments on draft.

For facilities that are to be assessed for 2014, boards are requested to update the base building inventory and capital renewal information in TCPS.

TCPS Training

Boards are reminded that condition assessment data is updated in the TCPS application. TCPS is a valuable asset management tool that enables boards to create capital plans, prioritize renewal projects, and therefore make efficient and effective use of assigning funding to capital projects.

Boards are strongly encouraged to take advantage of VFA training resources for basic and advanced user training in TCPS, either in-class or by webinar.

Webinars are available by request. The schedule for in-class training for the next three months is available below.

April	May	June
April 15-16: TCPS User Training	May 13-14: TCPS User Training	June 17-18: TCPS User Training
April 17: TCPS Advanced User Training	May 15: TCPS Advanced User Training	June 19: TCPS Advanced User Training

To register for in-class training, boards can login to the EDU-VFA Portal at http://www.edu-vfa.com. Alternatively, to register for in-class training or to arrange a webinar, please contact VFA by e-mail: edutraining@vfa.com.

Reporting of School Condition Improvement Expenditures

Boards are reminded that all school renewal expenditures funded by the School Condition Improvement (SCI) Allocation must be reported in TCPS. The Ministry is requesting that all expenditures incurred in the 2011-12 and 2012-13 school years which were funded by SCI be reported in TCPS **by June 30, 2014**. For assistance on how to enter SCI expenditures into TCPS, please contact VFA directly. **Boards that do not meet this reporting deadline may be subject to a withholding of future renewal funding**. Any board that requires an extension to complete this reporting requirement must contact Hitesh Chopra at Hitesh.Chopra@Ontario.ca by May 30, 2014.

VFA has made the required configuration changes in TCPS to allow Boards to select the respective budget type for SCI funding. There are now three additional budget types:

- SCIA 2011-2012

- SCIA 2012-2013

- SCIA 2013-2014

Note that the current Year in TCPS is 2013, which corresponds to the 2013-14 board school year. Projects completed between January 1st, 2013 and August 31st, 2013 are represented by an event year of 2012.

Remaining Service Life

A reminder to boards that the condition assessment data should be used by boards to update the remaining service life (RSL) of their assets. With three years of assessments now completed with the Condition Assessment Program, boards should have sufficient data to begin reviewing the RSL of these assets. Information about RSL of schools can provide support for a board's capital priorities request.

If you have additional questions relating to how to accurately update your remaining service life, please refer to Appendix M of the Ministry's Tangible Capital Assets Guide. Alternatively, please contact Soundari Vigneshwaran in the Ministry's Financial Analysis & Accountability Branch: Soundari.Vigneshwaran@ontario.ca or 416-326-9168.

Condition Assessment Program Update & Guidelines for Entering School Facility Inventory System (SFIS) Data

2. SFIS: Update on Rules & Procedures

In reviewing school board facility inventory data in the School Facilities Inventory System (SFIS), the Ministry has become aware of several inconsistencies among boards in how facility records are updated to reflect changes – either through the creation of new SFIS numbers or the re-use of existing SFIS numbers. This memorandum provides some guiding principles for boards around how SFIS data should be updated in this regard and supports SFIS rules and procedures outlined in the SFIS User Guide found at https://sfis.edu.gov.on.ca.

Description of SFIS Numbers

The Ministry uses the following description of SFIS numbers to better understand when this needs to be created:

- SFIS numbers refer to all or a portion of a physical building.

- The SFIS numbers are used as the primary key in the SFIS database.

- The SFIS database primarily stores information on the characteristics of the space it refers to.

- The SFIS database stores limited information on the use of the space. Average Daily Enrolment is one example.

The key principle for understanding when new SFIS numbers need to be created is that SFIS numbers refer to physical space. If a new building is created or an existing building needs to be subdivided, new SFIS numbers are needed.

When to create a new SFIS Number:

- A new building needs a new SFIS number.

- If there are fewer SFIS numbers than programs, identified by BSID, operating in a building, new SFIS numbers are created until each program or BSID has a unique SFIS number. The data for the existing SFIS numbers and new SFIS numbers is adjusted to refer to the space being used by the programs or BSIDs.

- For programs or BSID operating in different locations, an SFIS number is created based on the space used at the different locations.

- Even if a move is temporary, a new SFIS number should be created if there are fewer SFIS numbers than programs in a building.

- If a school is sold to another Board, the SFIS number for the selling Board is deleted and a new SFIS # is created for the purchasing Board.

When to reuse an existing SFIS Number:

- When an addition is built on an existing building, the SFIS number of the existing building is used. The data in the SFIS database is updated for the existing record to capture the change.

- If a program uses a space referred to by an existing SFIS number, the SFIS number should be reused. For example, if a program is closed, the SFIS # remains valid and should be used by a new program that opens in the same space.

Please see Appendix B for additional SFIS definitions, rules and scenarios. The scenario table in the appendix identifies when to create a new SFIS number and when to reuse an old SFIS number. In addition, it provides guidance to boards about how boards should report facility information involving specific situations, such as shared facilities, third party leases, and demolitions. Boards are expected to ensure that SFIS is updated as soon as possible to reflect these guidelines.

Key Contacts

We thank you for your ongoing co-operation in supporting both the Condition Assessment program and the maintenance of school board facility inventory data in SFIS.

For further information about the Condition Assessment Program, please contact the following individuals from the Ministry or VFA:

Ministry Contacts:

Hitesh Chopra: (416) 325-1887 or Hitesh.Chopra@Ontario.ca or Mathew Thomas: (416) 326-9920 or Mathew.P.Thomas@Ontario.ca

VFA Contacts:

Program Management:

Sazan Bimo | sbimo@vfa.com | 647-497-5421

For Condition Assessments:

Lamya Baraam | lbaraam@vfa.com | 647-497-5417

TCPS Support:

Al Kostiuk | akostiuk@vfa.com | (647) 497-5405

TCPS Support Line: help@vfa.com | 1-877-333-3537 or 905-953-9948 ext 2517

For further information about SFIS number assignments, please contact Elsa Cailin at (416) 326-2837 or Elsa.Cailin@Ontario.ca. Alternatively, you may contact your Ministry Capital Analyst.

Sincerely,

Original Signed by:

Grant Osborn
Director
Capital Policy and Programs Branch

cc: Directors of Education Marie Li, Director

Financial Analysis and Accountability Branch, Ministry of Education

Condition Assessment Program Update & Guidelines for Entering School Facility Inventory System (SFIS) Data

Appendix A: Assessment Schedule

DSB No.	DSB Name	2011 Actual	2012 Actual	2013 Actual	2014 Planned	2015 Planned
1	DSB Ontario North East		19	10		
2	Algoma DSB	25		25	6	
3	Rainbow DSB	25		19		
4	Near North DSB	20		21		
5.1	Keewatin-Patricia DSB		24			
5.2	Rainy River DSB		12		2	
6.1	Lakehead DSB		31			
6.2	Superior-Greenstone DSB		16			
7	Bluewater DSB		24		23	
8	Avon Maitland DSB		21		15	
9	Greater Essex County DSB	30		23	19	
10	Lambton Kent DSB	25			19	22
11	Thames Valley DSB	35	35	35	30	23
12	Toronto DSB	99	92	130	120	115
13	Durham DSB	26	25	25	19	
14	Kawartha Pine Ridge DSB		20	21	24	24
15	Trillium Lakelands DSB		16	20		15
16	York Region DSB		20	40	68	68
17	Simcoe County DSB	25	25	25	25	
18	Upper Grand DSB		25		22	25
19	Peel DSB	40	46	40	51	56
20	Halton DSB	35		21		31
21	Hamilton-Wentworth DSB	33		25	29	
22	DSB of Niagara	29		10	38	35
23	Grand Erie DSB		25	20		

Condition Assessment Program Update & Guidelines for Entering School Facility Inventory System (SFIS) Data

DSB No.	DSB Name	2011 Actual	2012 Actual	2013 Actual	2014 Planned	2015 Planned
24	Waterloo Region DSB		25		47	43
25	Ottawa-Carleton DSB	31	30	32	27	25
26	Upper Canada DSB	25		25	20	19
27	Limestone DSB	16		20	22	
28	Renfrew County DSB		16		11	
29	Hastings and Prince Edward DSB		18	20	9	
30.1	Northeastern Catholic DSB		3	1		
30.2	Nipissing-Parry Sound Catholic DSB	7		4		
31	Huron-Superior Catholic DSB	13		10		
32	Sudbury Catholic DSB	11		5		
33.1	Northwest Catholic DSB		7			
33.2	Kenora Catholic DSB		6			
34.1	Thunder Bay Catholic DSB		21			
34.2	Superior North Catholic DSB		10			
35	Bruce-Grey Catholic DSB		14			
36	Huron Perth Catholic DSB		19			
37	Windsor-Essex Catholic DSB	20		10	20	
38	London District Catholic School Board	20		15		18

Condition Assessment Program Update & Guidelines for Entering School Facility Inventory System (SFIS) Data

DSB No.	DSB Name	2011 Actual	2012 Actual	2013 Actual	2014 Planned	2015 Planned
39	St. Clair Catholic DSB	10				18
40	Toronto Catholic DSB	40	40	42	38	38
41	PVNC Catholic DSB	10		10	9	8
42	York Catholic DSB	20	20	21	20	19
43	Dufferin-Peel Catholic DSB	30	30	30	25	
44	Simcoe Muskoka Catholic DSB	13	13	13	8	
45	Durham Catholic DSB	26	22			
46	Halton Catholic DSB	20				30
47	Hamilton-Wentworth Catholic DSB		20	21	12	
48	Wellington Catholic DSB		20			
49	Waterloo Catholic DSB		18		18	19
50	Niagara Catholic DSB		20		20	16
51	Brant Haldimand Norfolk Catholic DSB		11	11		10
52	Catholic DSB of Eastern Ontario	10			17	16
53	Ottawa Catholic DSB	18	19	18	15	14
54	Renfrew County Catholic DSB		22			
55	Algonquin and Lakeshore Catholic DSB		20		19	
56	CSD du Nord-Est de l'Ontario		8			1

Condition Assessment Program Update & Guidelines for Entering School Facility Inventory System (SFIS) Data

DSB No.	DSB Name	2011 Actual	2012 Actual	2013 Actual	2014 Planned	2015 Planned
57	CSD du Grand Nord de l'Ontario	7		6		
58	Conseil scolaire Viamonde	9	20		7	
59	Conseil des écoles publiques de l'Est de l'Ontario	15			17	
60.1	CSD catholique des Grandes Rivières		22	12	6	
60.2	CSD catholique Franco-Nord	6		5		
61	CSD catholique du Nouvel-Ontario	21		12		
62	CSD catholique des Aurores boréales		5			
63	Conseil scolaire catholique Providence	15		13		
64	CSD catholique Centre-Sud	8	10	23	9	1
65	CSD catholique de l'Est ontarien	18			15	4
66	CSD catholique du Centre-Est de l'Ontario	15			15	5
	Totals	**905**	**981**	**927**	**898**	**718**

Condition Assessment Program Update & Guidelines for Entering School Facility Inventory System (SFIS) Data

Appendix B:

SFIS Definitions and Rules Building and Campus ID

- A building is a stand-alone facility with its own walls and roof.

- Building structures are permanent in nature with a typical useful life of approximately 40 years

- Boards should call their capital analysts in situations where buildings are connected by common walls, walkways or tunnels.

- Building IDs are linked to a particular building and should never be moved to a different building.

- Campus IDs are linked to a particular site and should also never be moved.

- For new buildings, the SFIS number must be created and verified before issuing a new BSID.

Shared Facilities

- To avoid double counting, boards should only be reporting the on-the- ground capacity (OTG) for the portion of the facility that they are operating in.

- The gross floor area (GFA) should be divided proportionately and be attributed to the OTG and average daily enrolment (ADE) of the shared facility.

Example of an accurately recorded shared facility:

BSID	BOARD	SFIS ID	OTG	GFA	ADE
1000-1	XY	55555	400	4,828	350
1000-1	AB	55556	600	7,242	550
Total			1,000	12,070	900

Third-Party Leases

- GFA for schools that are in by third-party leases will now be reported in SFIS. This will allow the Ministry to assess the actual area per pupil of the facility.

Condition Assessment Program Update & Guidelines for Entering School Facility Inventory System (SFIS) Data

Multi-Building Schools

- Boards have to create SFIS records for each building and report the GFA, OTG and ADE that corresponds to each building. If there are two or more programs or BSIDs in any or each of the buildings, these should be represented with two or more SFIS entities.

Demolitions

- When recording a partial or full demolition of a facility, the year built should not be used to record the year the demolition occurred. The year the demolition occurred should be recorded in the comments field.

Year Built	GFA (m2)	Type	Comments
1970	4000	Original	
1980	1000	Addition	
1970	-500	Demolition	Demolition of 500 m2 from 1970 original building occurred in January 2014

Condition Assessment Program Update & Guidelines for Entering School Facility Inventory System (SFIS) Data

SFIS Scenario Table: Rules in Assigning SFIS #, Campus ID and Building ID

Description	Example	SFIS #	Campus ID	Building ID
New Growth School on new board site.	New JK-8 facility	New	New	New
New Replacement school on existing board site.	Existing JK-8 school moving into a new replacement facility on an existing board site.	New	Same	New
New Replacement school on new board owned site.	Existing JK-8 school moving into a new replacement facility on a new board site.	New	New	New
New school in an open facility	New JK-8 school in existing 9-12 facility	New	Same	Same
New Program in an open facility	New Alternative School (eg. Boys Leadership Academy) in an existing open facility.	New	Same	Same
School panel change within a building	Existing JK-8 school changes to 9-12.	Same	Same	Same
New school created in closed facility	Closed facility to re-open as a JK-6 facility.	Same as closed facility	Same as closed facility	Same as closed facility
Existing school moved into closed facility	9-12 moved from a leased or shared facility to an existing closed facility.	Same as closed facility	Same as closed facility	Same as closed facility
Temporary holding school in an open facility.	Grades 7-8 temporarily relocating to an existing JK-8 open facility.	New	Same	Same
Temporary holding school in a closed facility.	Grades 7-8 temporarily relocating to an existing closed facility.	Same as closed facility	Same as closed facility	Same as closed facility
When a board dedicates space for Admin and/or a Con-Ed program in an open facility	An existing 9-12 facility converts significant space for admin or Con-Ed purposes.	New	Same	Same
When a board uses a closed school building for Admin or Con-Ed program (permanently or temporarily)	Education Centre using a closed school building while new Education Centre building is under construction	Same as closed facility	Same as closed facility	Same as closed facility
Recognizing a school within an Admin or Con-Ed facility.	Admin building becomes a multi-purpose facility, such that it now holds a Jk-6 facility.	New	Same	Same
Schools consolidating into an open facility	Three JK-8 schools A, B, C consolidating in school B	Same as school B	Same as School B	Same as school B

Description	Example	SFIS #	Campus ID	Building ID
Schools consolidating in a new facility, same site as any of the schools	Two 9-12 schools A and B consolidating in new building in school B campus	New	Same as School B	New
Schools consolidating in a new facility, new site	Three JK-8 schools A, B and C consolidating in new facility in a new location and different from the three consolidating schools sites	New	New	New
School sold to another board	DSB X sold school A to DSB Y	New	Same	Same