
From: Silver, Matt GCPE:EX
Sent: Monday, October 1, 2012 8:42 AM
To: Kukucha, Karen A EDUC:EX
Subject: CHBC: School building construction over budget

Karen, can we check in with Doug about this – what are the actual costs etc.

Thanks,

Matt

CHBC (Kelowna)
CHBC News at 5:00
28-Sep-2012 17:33

Copyright



SCHOOL DISTRICT NO. 53
(OKANAGAN SIMILKAMEEN)

Box 1770, 6161 Okanagan Street
Oliver BC V0H 1T0
Phone: 250-498-3481
Fax: 250-498-4070
Website: www.sd53.bc.ca

March 19, 2013

Ministry of Education
Capital Management Branch
PO Box 9151 Stn. Prov Gov't
5th Floor, 620 Superior Street
Victoria, BC V8W 9H1

Attention:

Doug Stewart, Capital Planning Branch doug.i.stewart@gov.bc.ca
John Woycheshin, Regional Manager john.woycheshin@gov.bc.ca
Craig Harris, Planning Officer craig.harris@gov.bc.ca

Dear Sirs:

As you are aware, certificate #618-113849-03, in the amount of \$50,438,736, has been issued for the reconstruction of Southern Okanagan Secondary School. The certificate included a risk reserve of \$1,345,475.

Due to tender amounts exceeding the allotted budget cost, the district is experiencing significant shortfalls on this project. The district has reviewed and redesigned many aspects of the original structure. This was a lengthy process reducing the overall shortfall costs by \$1.2 million. No further cuts can be made without affecting the successful completion of the project. School District No. 53 requests therefore the release of the total amount of the risk reserve approved by the Ministry.

Your support in this request will be greatly appreciated.

Yours truly

Lynda Minnabarriet
Secretary-Treasurer

/mb

Description		Planned Budget - Option 5A	Committed and Antici- pated Final Cost	Variance
Construction - All Contract Commitments		\$18,531,668.78	\$21,132,543	(\$2,600,874)
Savings to date: Post-Tender VE (CCN12.4)		\$0	-\$1,031,136	\$1,031,136
Current Contract Revisions (Excl. VE)		\$0	-\$38,951	\$38,951
Sub-Total		\$18,531,669	\$20,062,455	(\$1,530,787)
Consultants Fee Changes to Facilitate VE (Expended)		\$0	\$75,000	(\$75,000)
Design Fees and Disbursements		\$1,223,113	\$1,844,522	(\$621,409)
Municipal Permits & Fees		\$70,000	\$70,000	\$0
i. Feasibility Costs - Revised PIR etc. after fire destruction		\$50,000	\$50,000	\$0
ii. Temporary Accommodation - Increased operating costs		\$240,000	\$240,000	\$0
Construction Contingency		\$445,972	\$445,972	\$0
Equipment		\$1,557,825	\$1,557,825	\$0
Less: Planned VE of Equipment Scope		\$0	\$0	\$0
Add: Addtl. Fire Cost - Reloc. portables - CPA includes \$80,000		\$0	\$60,000	(\$60,000)
Add: Addtl. Fire Consult. Fees - CPA includes \$212,000		\$0	\$114,000	(\$114,000)
Add: Critical VE items added back into scope		\$0	\$0	\$0
Sub-Total		\$22,118,579	\$24,519,774	(\$2,401,196)
HST - full 12%		\$2,654,229	\$2,942,373	(\$288,143)
Less: HST Rebate - Federal Portion	-28.33%	-\$752,032	-\$833,672	\$81,641
Less: HST Rebate - Provincial Portion	-50.75%	-\$1,347,021	-\$1,493,254	\$146,233
Add: GST/PST Rebate Variance - Allowance rtn. to PST		\$0	\$174,647	(\$174,647)
Total Project Budget (excluding Reserve Items)		\$22,673,755	\$25,309,867	(\$2,636,112)
General Contingency		\$0	\$0	\$0
Budget to Rebuild/Complete Project (PDR Option 5A)		\$22,673,755	\$25,309,868	(\$2,636,112)
Less: Below Line Risk Reserve		\$1,345,475	\$0	\$1,345,475
Budget to Rebuild/Complete Project (incl Risk Reserve)		\$24,019,230	\$25,309,868	(\$1,290,637)
Less: Remaining funds from COA 9Original Project)		-\$599,000	-\$599,000	\$0
Less: Variance Received from Theatre Contribution		-\$2,300,000	-\$2,571,650	\$271,650
Less: Reduction of Capital Funds for Fire Destruction		-\$1,345,505	-\$1,341,917	(\$3,588)
Less: Restricted Capital Reserve		-\$325,000	-\$328,588	\$3,588
Add: Community Reserves		\$0	-\$1,228,350	\$1,228,350
Current Shortfall or Surplus after Reserves		\$19,449,725	\$19,240,363	\$209,363

School District 53
SOUTH OKANAGAN SECONDARY SCHOOL
POST-TENDER VALUE ENGINEERING AND RISK - March 22, 2013

Introduction

School District 53 recently completed the design for the new South Okanagan Secondary School and community theatre. To expedite the schedule, the project team explored the benefits of separating some early works from the rest of the scope. As such, the structural component of the East Wing classroom was split into two individual tender packages, namely TP1 – Foundations and TP2 – East Wing Steel. The TP1 scope included the electrical room relocation and site servicing. The East Wing Steel (TP2) was tendered early to give the steel sub-contractor time to complete their shop drawing and manufacturing process earlier. This would also facilitate a quicker mobilisation for the General Contractor once the rest of the project was tendered.

SSA Quantity Surveyors Ltd. completed construction cost estimates at the 50% and 95% working drawings milestones. TP1 and TP2 were issued shortly after the 50% cost estimate was completed and both packages tendered close to their respective budgets. Greyback Construction was awarded the "TP1 – East Wing Foundation" works and Warnaar Steel-Tech was awarded the "TP2 – East Wing Steel Structure" package. Work commenced shortly thereafter.

The design for the remaining scope resumed and SSA produced a pre-tender estimate at the 95% Working Drawings stage. The estimate suggested that the project was still on budget, but with a small margin for risk. The third tender package (TP3) for the remaining scope was issued shortly thereafter. During the tender period a number of tender addenda were issued to capture last minute design details. Three compliant bids were received. All three bids were over budget, including the low bid from Greyback Construction. Their bid closed approximately \$2.85Mil. (12%) over budget. Construction had already commenced on the first two contracts and the project team had to value engineer the remaining scope to meet the budget, in a very short period.

The project team has produced a list of savings to both the construction scope as well as other non-construction components within the budget. Changes were priced by the General Contractor and reviewed by SSA and the consultants. Despite a concerted effort the team has not been able to make enough changes to meet the budget and stay on program.

This report describe the apparent reasons for the budget shortfall relating to TP3 and the efforts that followed to reduce the cost and bring the project within budget. It describes the current financial position of the project. It is also intended to support the SD's requests for the release of the remaining risk reserve previously approved by the Treasury Board.

School District 53
SOUTH OKANAGAN SECONDARY SCHOOL
POST-TENDER VALUE ENGINEERING AND RISK - March 22, 2013

Project Budget History

The approved above-line budget for the project is **\$22,673,755**. The approved below-the-line risk reserve, not included above, is **\$1,345,475**. The combined total approved project budget is **\$24,019,230** (*Schedule B - Option 5A*).

Immediately after Tender Package 3 closed, the anticipated final cost of the project was **\$25,531,379** resulting in a shortfall of **\$2,857,624** over the above-line budget of **\$22,673,755**.

In the months since the contract was awarded, the design team has worked extremely hard at identifying and realising value engineering and scope reduction savings of approximately **\$1,070,000**. The project also suffered a number of unforeseen cost increases during the same time. The net effect of the VE and the increases resulted in savings of **\$200,000**. Including HST this still resulted a budget shortfall of **\$2,636,112**.

At the time of the report the School District has identified an additional \$271,650 in funding sources and reconciled cash reserves of **\$1,228,350** from previous community contributions. These funding sources reduce the shortfall to **\$1,136,112**. If the School District is given access to the existing Risk Reserve of **\$1,345,475**, the project will be in debit by **\$209,363** (*See table 1. for clarity*). Approving the use of the existing Risk Reserve will deplete all reserves for future unforeseen circumstances and/or replacement of any critical scope removed during the VE process.

Challenges and Factors Contributing to Cost Overruns

Unit Rate/Location Factor

The budget is based upon the Ministry of Education's base funding rate of \$1,810/m² multiplied by the appropriate location factor for the Okanagan-Similkameen School District (SD53) and the allowable program area for the classrooms.

The location factor was reduced twice by the Ministry during the life of the project placing pressure on the replacement budget and the quality of the building.

The location factored rate changed as shown:

- At the start of the new school project June 2009: **\$3,161.53 /m²**
- During construction of the new school in Nov. 2009: **\$2,615.54 /m²**
- The replacement project rate Nov. 2011: **\$2,489.65 /m²**

School District 53
SOUTH OKANAGAN SECONDARY SCHOOL
POST-TENDER VALUE ENGINEERING AND RISK - March 22, 2013

The changes in unit rate had an impact on a number of factors described further.

Theatre Unit Rate

The project includes a 400 seat theatre to replace the one that burned down in 2011. The local community contributed a portion of the funds, but not enough to fund the difference in the cost of a typical the school compared to a theatre. This shortfall placed more pressure on the team to design a functioning theatre facility within the total available funding.

Design Intent and Concept

The section of the existing school that survived the fire was designed and built when the base rate was higher. At the time, the design team produced a well functioning building, good quality building with creative aesthetic appeal. There is an expectation from the owner and the community that the new building does not vary significantly from the existing. Hence, the team designed the new building to resemble the existing.

Albeit the combined area of the theatre and school is within the net allowable area, the tender results were significantly higher. The design was not extraordinarily complicated nor over specified, which in our opinion suggests that the funding may have been insufficient to repeat the quality of the existing.

Mechanical System

The main building mechanical system, including the majority of the equipment was installed as part of the original project. The head-end equipment was designed to be part of the overall system. Deviation from that system was not viable, forcing the mechanical system design to match the existing. The implications were that Value Engineering of the new mechanical system to reduce cost was limited.

Tender Addenda and Pre-Tender Estimate

All cost estimates were based upon the same methodology. However, TP1 and TP2 tenders both closed on budget, while TP3 did not. The TP3 tender review isolated the trades that contributed mostly to the cost overrun. In effort to understand whether there had been any obvious errors SSA reviewed the unit rates within the estimate relative to each high trade package as well as the tender addenda. Due to the fast paced tender process and number of tender addenda issued, there was not enough

School District 53
SOUTH OKANAGAN SECONDARY SCHOOL
POST-TENDER VALUE ENGINEERING AND RISK - March 22, 2013

time to produce estimates corresponding to each change. After the bid review it was evident that some of the addenda contained scope creep that significantly increased bid pricing, greater than the pre-tender estimate.

Change in Market Conditions

The possibility exists that the tender package reached the sub-contracting community during an irregular peak in market activity. Although this phenomenon is difficult to prove, a number of projects tendered around the same time experienced abnormally high tender results.

Perception of Contract Award

The project team made it clear in the TP3 tender documents that the TP1 contractor would have completed their scope and left the site prior to the TP3 contractor commencing work. With Greyback being awarded the General Contract for TP1, there might have been an incorrect assumption made by other general contractors that Greyback has already been awarded the entire project. The lack of interest during tendering could be attributed to such an assumption. Only three general contractors submitted bids.

Supplementary Site/Building Contingency

Although the PIR Schedule B Estimate Summary included design contingencies for Supplementary Site and Supplementary Building conditions, there was no Construction Contingency added. This puts pressure on the rest of the Construction Contingency, which is being used currently to fund changes in design and on site as intended.

Portable removal cost extensively higher than planned

The replacement project budget and funding approval included an allowance for relocating the existing portables from site. The value included was \$80,000. Quotations have been solicited and the cost is proving to be greater, by a premium of around \$50,000.

Uncertainty of final consulting fees after fire

The replacement project budget and funding approval included an allowance for late consulting fees associated with the coordination of the existing building, fire damage work and the new building. The value included was approximately \$160,000. Since the

School District 53
SOUTH OKANAGAN SECONDARY SCHOOL
POST-TENDER VALUE ENGINEERING AND RISK - March 22, 2013

start of the new project, claims for approved fees has reached \$274,000, a premium of \$114,000.

Schedule

Regardless of any other challenges, the project always had a very restricted design and procurement schedule, driven by the need to get students into the new building by September 2013. The third tender package closed far enough over budget to allow the design team to make changes and re-tender. The first two tender awards were already underway and stopping the third to re-tender was not viable within the schedule. In turn, the School District chose to award the contract, Value Engineer the project scope and reduce the contract price as work resumed.

Risk Reserve

The project agreement included a risk reserve of \$1,345,475 which was essentially sufficient to cover cost overruns under normal conditions. Given the circumstances surrounding the original project and fire, it is evident from the challenges described above that the project can't be treated as normal. Hence, the Risk Reserve is considered to be too small for this project.

Mitigating Action

Post-Tender Value Engineering

It was the School District's intention to not delay the delivery period of the school beyond September 2013. The negative impact of a late completion to the students and staff could not be justified following their recent devastation and disruption. The School District therefore chose to continue construction without a full redesign of the project.

To mitigate the cost overrun, the owner initiated an immediate post-tender Value Engineering exercise to revise the scope to meet the budget. Greyback was authorised to mobilise and commence work on the East Wing portion of TP3 on condition that they support the design team with identifying and pricing cost savings ideas through their trade contractors and their own costs. With their assistance, the design team spent weeks to identify over \$1.7M worth of savings without reducing the program.

For practical reasons not all VE ideas could be approved and roughly \$300k ideas were rejected. At the time of the report changes valued at a reduction of \$1,031,136 have

School District 53
SOUTH OKANAGAN SECONDARY SCHOOL
POST-TENDER VALUE ENGINEERING AND RISK - March 22, 2013

been designed, priced and approved. All approved and accepted changes are contained in the attached breakdown. The VE exercise has had a negative effect on the quality and aesthetics of the building and attracted more design fees and delays of its own.

Soft Cost Budget

The original project budget contained allowances for design fees, owner direct costs, owner supplied furniture, furnishings and equipment (FF&E) and a construction contingency. As part of the VE exercise each of these allowances were reassessed based on the current scope and risk.

Anticipated Final Cost

The revised anticipated final cost of the project, including the current Risk Reserve is attached to the report.

From: Flett, Roberta FIN:EX
Sent: Wednesday, January 8, 2014 9:17 AM
To: Strueby, Earl EDUC:EX
Subject: SD53 South Okanagan Secondary School File 085349

Hi Earl,

I am following up on my email below as I haven't had a response. It appears that it would be best to close out our file on this rather than incur more expense.

Please advise the amount that the Ministry paid out on the claim to the SD for our records.

Thanks

Roberta Flett
Senior Claims Examiner
SPP/Risk Management Branch
Phone: 250-952-0834 Fax: 250-356-6222
Email: Roberta.Flett@gov.bc.ca

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From: Flett, Roberta FIN:EX
Sent: Monday, November 4, 2013 9:39 AM
To: Strueby, Earl EDUC:EX
Subject: SD53 South Okanagan Secondary School File 085349

Hi Earl,

I received a call from Mitch today at SD53.

We still have Tony Read trying to go through all the invoices for the remediation but on such a massive claim it is nearly impossible to do so.

Mitch has confirmed that they have paid all the invoices already. Tony did review hundreds of invoices and did not find any errors. Mitch indicated there are five boxes of invoices and he would have to sit down with Tony for weeks to go through them to help make sense of them.

It doesn't appear it would be economical to have the adjuster continue to review all the invoices as it is going to cost thousands of dollars.

Please advise.

Thanks

Roberta Flett
Senior Claims Examiner
sPP
Phone: 250-952-0834 Fax: 250-356-6222
Email: Roberta.Flett@gov.bc.ca

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From: Strueby, Earl EDUC:EX

Sent: Wednesday, September 12, 2012 2:18 PM

To: Flett, Roberta FIN:EX

Cc: Stewart, Doug I EDUC:EX; Chambers, Phillip R EDUC:EX

Subject: RE: Southern Okanagan Secondary - SD53 - File 085349

I agree we do not see a need for Tony Read in the new rebuild. He can complete his work on the remediation portion and no further involvement in the new contract. Thanks for your assistance on this.



May 3, 2013

VIA EMAIL

Ref: 167208

Linda Minnabarriet
Secretary-Treasurer
School District No. 53 (Okanagan Similkameen)
PO Box 1770
Oliver BC V0H 1T0
Email: lminnaba@sd53.bc.ca

Dear Linda Minnabarriet:

Re: Amended Certificate of Approval – South Okanagan Secondary

I am responding to your letter of March 19, 2013, requesting risk reserve funding approval of \$1,345,475 for the replacement of South Okanagan Secondary School currently under construction. I understand this request is based on tender amounts exceeding the allotted budget costs resulting in significant shortfalls following the post-fire disaster cost review.

As you know, on March 13, 2009, the Minister approved Project Agreement No. 113849 for the amount of \$27,511,251 with provincial funding of \$25,959,440 and a contingency reserve of up to \$1,551,811.

I understand that an amendment was subsequently approved in September 2010 based on the impact of de-escalation, inclusion of HST, and additional space needs for a Neighbourhood Learning Centre. The Minister approved capital funding up to a maximum of \$29,258,431 with provincial funding of \$27,527,851 and a contingency reserve in the amount of \$1,730,580.

As we know, on September 12, 2011, a fire halted implementation. A Treasury Board submission requesting additional funding was subsequently approved March 27, 2012, providing additional funds of \$21,180,305 and increasing the total project budget to a maximum of \$51,784,211 with provincial funding of \$50,438,736 and a contingency reserve of \$1,345,475. This letter confirms your approval to access contingency reserve funds.

Your request to access contingency reserve funds is approved.

Your Capital Bylaw No. 113849 included a maximum allocation of \$51,784,211 and the current Certificate of Approval (#618-113849-03) is in the amount of \$50,438,736. Therefore, an amended Certificate of Approval (# 618-113849-04) in the amount of \$51,784,211 is enclosed.

.../2

**Ministry of
Education**

Resource Management
Division

Mailing Address:
PO BOX 9151 STN PROV GOVT
Victoria BC V8W 9H1
Telephone: (250) 356-7814
Facsimile: (250) 953-4985

Location:
5th Floor
620 Superior St
Victoria BC

I wish the School District every success with the new South Okanagan Secondary School.

Yours sincerely,

Doug Stewart, A/ADM
Resource Management Division

Enclosure

pc: Beverly Young, Superintendent of Schools
Heather Hill, A/Director, Capital Management Branch
John Woycheshin, Regional Manager
Craig Harris, Planning Officer

bcc: Cherrie Calvert, Project Information Analyst

APPROVALS			
Contact Info		Comments	Date
Drafted by:	Craig Harris, Planning Officer	167208 – Minnabarriet	2013-05-02
Regional Mgr.	John Woycheshin	For approval	
A/Director, Capital Management Br.	Heather Hill	Signature	
ADM	N/A		
MCO	N/A		
DM	N/A		

*Remove the Approval Block before saving as a PDF**



FAXED
2012/4/12

VIA FAX
Our Ref: 157829

April 12, 2012

Lynda Minnabarriet
Secretary-Treasurer
School District No. 53 (Okanagan Similkameen)
PO Box 1770
Oliver BC V0H 1T0
Fax: 250 498-4070

Dear Lynda Minnabarriet:

Re: Amended Certificate of Approval - South Okanagan Secondary School

Further to the recent letter from Honourable George Abbott, Minister of Education, I am pleased to confirm approval for the completion of South Okanagan Secondary School in Oliver. The revised budget (Schedule B) is attached.

The original Certificate of Approval (No. 618-113849 -02) in the amount of \$29,258,431 has been amended to include the original risk reserve amount of \$1,730,580 plus new funding to complete the project in the amount of \$19,449,725. The revised COA amount after the above noted adjustment is \$50,438,736.

Your new Certificate of Approval (# 618-113849-03) in the amount of \$50,438,736 is now enclosed. A new risk reserve has also been established in the amount of \$1,345,475.

I wish the School District every success with the rebuilding of South Okanagan Secondary School.

Yours sincerely,

Doug Stewart, Director
Capital Management Branch

pc: Phillip Chambers, Regional Manager, Capital Management Branch
Earl Strueby, Planning Officer, Capital Management Branch

Attachments

Ministry of
Education

Resource Management
Division

Mailing Address:
PO BOX 9151 STN PROV GOVT
Victoria BC V8W 9H1
Telephone: (250) 356-7814
Facsimile: (250) 953-4985

Location:
5th Floor
620 Superior St
Victoria BC



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CAPITAL PROJECT CERTIFICATE OF APPROVAL

Sponsoring Ministry: MINISTRY OF EDUCATION Division:

Government Body: SD# - 53 OKANAGAN SIMILKAMEEN

Certificate Number: 618-113849

Revision No.: 03

This Certificate is issued pursuant to the Treasury Board approval for the Capital Project described below (the "Project") and a Memorandum of Understanding (the "COA-MOU") between Provincial Treasury and the Sponsoring Ministry. This Certificate constitutes an approval by the Province for the Government Body to request Capital Funding (Advance) from the Province in accordance with the COA-MOU for the purpose of facilitating approved Project expenditures.

APPROVED CAPITAL PROJECT

Project No.: 113849

Project Location:

Facility Name: SOUTHERN OKANAGAN SECONDARY

Project Description: ADDITIONS/RENOVATIONS - 550 STUDENT GRADES 8-12

Total Estimated Project Costs: \$ 50,438,736.00

Treasury Board Approval Stage: 1. ___ Site 2. ___ Planning 3. X Completion

Funding Detail (this certificate cancels and replaces all previous certificates issued for the Project):

Previous Certificate No.: 618-113849

Previous Revision No.: 02

Previous Total Approved Advance: \$ 29,258,431.00

Increase (Decrease) Determined By This Certificate: \$ 21,180,305.00

Total Approved Advance: \$ 50,438,736.00

Expiry Date: MARCH 31, 2015

GOVERNMENT BODY ACCOUNT

s.15,s.21

Financial Institution:

Transit No.:

TERMS OF APPROVAL

1. The **Total Approved Advance** approved by this Certificate represents the maximum that may be advanced for the Project.
2. This Certificate is valid only until the **Expiry Date** or until cancelled by the Sponsoring Ministry. This Certificate is not transferable.
3. Additional terms specific to the Project made between the Sponsoring Ministry and the Government Body are set out below or in the attached Appendix.

TOTAL APPROVED BORROWING HAS BEEN REDUCED BY 0.00 FUNDED FROM
MINISTRY OF EDUCATION-RESTRICTED CAPITAL AND/OR LAND CAPITAL RESERVE.

SIGNATURE OF RESPONSIBLE MINISTER OR DESIGNATE

Phillip Chambers

EFFECTIVE DATE

APRIL 05, 2012

ORIGINAL: MINISTRY OF FINANCE

COPIES: 1) GOVERNMENT BODY 2) SPONSORING MINISTRY

School Name:		South Okanagan Secondary School		
Project No:		113849		
Project Description:		550 Student Grade 8 to 12 - POST FIRE DESTRUCTION - OPTION 5A		

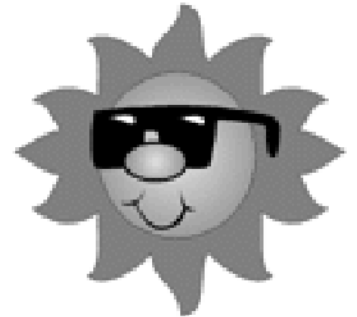
Nominal Capacity	Kindergarten	Grades 1 - 7	Grades 8 - 12	Grade Configuration
Existing				
Approved				
Additional				

A R E A - U N I T R A T E	Allowable Site Area (ha)	
	Allowable Building Area (sqm)	
	Total Allowable Area	0
	Less: Previously Existing Space	0
	Add: Area to be Demolished	0
	Area of New Space	3,005
	Allowable Area of Renovations	0
	Unit Rate for Construction (\$/sqm) (based on 1 st Quarter 2011 Location Factor and using Ministry Unit Rates)	
	New (see calculation below)	\$2,489.65
	Renovation	

PROJECT BUDGET		REVISED PROJECT AGREEMENT	Amounts Subject to Economic Adjustment
1	Site Acquisition	\$0.00	\$0.00
2	Site Development	\$1,438,944.00	\$1,438,944.00
3	New Construction (3,005m ² allowable area x \$2,489.65/m ²) - see Unit Rate Calculation below	\$7,480,491.72	\$7,480,491.72
4	Renovation	\$0.00	\$0.00
5	Design Fees and Disbursements	\$1,223,113.49	\$1,223,113.49
6	Construction Contingency	\$445,971.79	\$445,971.79
7	Equipment	\$1,557,824.50	\$1,557,824.50
8	Municipal Permits & Fees	\$70,000.00	\$70,000.00
Documented Supplementary Items (including fees and related costs)			
9	Supplementary Site	\$737,178.75	\$737,178.75
10	Supplementary Building	\$2,574,520.41	\$2,574,520.41
11	Off-Site Costs	\$0.00	\$0.00
12	LEED® Gold (3%)	\$224,414.75	\$224,414.75
13	List of Other Budget Items:		
	i. Feasibility Costs - Revised PIR etc. after fire destruction	\$50,000.00	\$50,000.00
	ii. Temporary Accommodation - Increased operating costs	\$240,000.00	\$240,000.00
	iii. Neighbourhoods of Learning (810m ²)	\$1,976,619.15	\$1,976,619.15
	iv. Theatre (911m ²)	\$4,099,500.00	\$4,099,500.00
	v.	\$0.00	\$0.00
	vi.	\$0.00	\$0.00
14	Sub-Total	\$22,118,578.56	
15	HST	12.00%	\$2,654,229.43
16	HST Rebate - Federal Portion	28.33% (68% of five twelfths)	-\$752,031.67
17	HST Rebate - Provincial Portion	50.75% (87% of seven twelfths)	-\$1,347,021.43
(A)	Total Project Budget (excluding Reserve Items)	\$22,673,754.88	
(B)	Total Project Budget Eligible for Economic Adjustment		\$22,118,578.56
RESERVE ITEMS (as per Schedule C - Reserve Items)			
List of Identified Risks			
	1. Escalation Allowance	\$453,475.10	
	2. Change from HST to PST/GST	\$392,000.00	
	3. Unknowns	\$500,000.00	
	4	\$0.00	
	5	\$0.00	
	6	\$0.00	
(C)	Maximum "Not to Exceed" Contingency	Sub-Total	\$1,345,475.10
(D)	Estimated Economic Adjustment (from Location Factor 1 st Quarter 2011 to Mid-Point of Construction)		\$2,131,036.35
(E)	Total Reserve Items	\$1,345,475.10	[=C+D]
(F)	MAXIMUM POTENTIAL PROJECT COST (including Reserve Items)	\$24,019,229.98	[=A+E]
F U N D I N G S O U R C E S	(G) Capital Plan [as per Capital Project Funding Agreement, subparagraph 3.01(a)]	\$20,048,012.69	
	(H) Ministry of Education Restricted Capital [as per paragraph 3.04]	\$325,742.19	
	(I) Borrowing [as per paragraph 3.05]		
	(J) Local Capital Reserve [as per subparagraph 4.02(e)]		
	(K) Annual Facility Grant [as per subparagraph 4.02(e)]		
	Other (specify) [as per subparagraph 4.02(e)] - Contribution to Theatre from local community		
	(L) (\$3,800,000 less \$1,500,000 already contributed prior to the fire)	\$2,300,000.00	
	Sub-Total	\$22,673,754.88	[=A]
	(M) Capital Plan - Identified Risks [as per sub-paragraph 3.01(b)]	\$1,345,475.10	[=C]
	(N) Capital Plan - Estimated Economic Adjustment [as per subparagraph 3.01(d)]	\$0.00	[=D]
Sub-Total	\$1,345,475.10	[=E]	
(O) MAXIMUM POTENTIAL PROJECT FUNDING	\$24,019,229.98	[=F]	
(includes Lines G, H, I, J, K, L, M and N)			

Unit Rate for Construction as per Ministry Guidelines	
Base Unit Rate	1,065.00
Project size factor (see calc adjacent)	1.0600
Base Unit Rate x Project size factor	1,128.85
Air Conditioning	40.00
Subtotal	1,168.85
Location factor - 1st Quarter 2011	2.13
Unit rate (Subtotal x Location factor)	2,489.65

Project Size factor - Ministry Guidelines Secondary	
Lower area	3,000
Upper area	4,000
Actual Size	3,005
Difference	5
Calculated Size Factor	1.0600



SOUTHERN OKANAGAN SECONDARY SCHOOL

10332 - 350th Avenue, Oliver BC V0H 1T0

School District No. 53 (Okanagan Similkameen)

POST FIRE DESTRUCTION – PROJECT IDENTIFICATION REPORT (PIR)

November 15, 2011



**SOUTHERN OKANAGAN SECONDARY SCHOOL
School District No. 53 (Okanagan Similkameen)
POST FIRE DESTRUCTION – PROJECT IDENTIFICATION REPORT (PIR)**

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SOUTHERN OKANAGAN SECONDARY SCHOOL
School District No. 53 (Okanagan Similkameen)
POST FIRE DESTRUCTION – PROJECT IDENTIFICATION REPORT (PIR)

TABLE OF CONTENTS

1.0	INTRODUCTION & OVERVIEW	4
2.0	BACKGROUND INFORMATION	6
3.0	DEVELOPMENT OPTIONS:	9
3.1	OPTION 1.....	10
3.2	OPTION 4A	11
3.3	OPTION 5A	12
3.4	OPTION 5B.....	13
4.0	PARTNERSHIP OPPORTUNITIES	14
5.0	PROJECT PROCUREMENT	14
6.0	RISK ASSESSMENT	15
7.0	COST ESTIMATES.....	15
8.0	RECOMMENDATION.....	20
9.0	CAPITAL COST ESTIMATES.....	21
10.0	DESIGN AID SHEETS.....	22



1.0 Introduction & Overview

1.1 Background

Southern Okanagan Secondary School (SOSS), while under construction as a significant addition and renovation project, was recently engulfed by a disastrous fire in the early morning on September 11, 2011, that destroyed almost all of the existing school building that was designated for renovation. Most of the new building construction, which was almost complete, was saved by the action of the local fire department, aided by a 2 hour fire wall between the existing building and the new construction.

The fire destroyed about 60% of the existing school building that was to be renovated as part of the project.

SOSS provides educational space for secondary students in the Southern Okanagan and is designated as a nominal 550 student school for Grades 8 through 12. The school is located at 10332 - 350th Avenue, Oliver BC.

This PIR relates only to the project after the fire destruction. Please refer to the previous Project Identification Report (PIR) for further information about the project, prior to the fire.

This PIR is an abbreviated document intended to provide clear direction regarding how the project should proceed as quickly as possible, in a logical manner, so that the students now being housed in portables can quickly be provided with a proper educational environment.

THIS PROJECT IS CONSIDERED TO BE A CRITICAL HIGH PRIORITY PROJECT.

This report generally follows the guidelines set out by the Ministry of Education and includes the following sections, but abbreviated, as much of the rationale for the project was submitted in the original PIR for the project.

- Investigative;
- Facility Program;
- Systems Reports;
- Preliminary Concepts;
- Partnership Opportunities;
- Project Procurement;
- Risk Management;
- Cost Estimate;
- Life Cycle Costing Comparison;
- Recommendations.

1.2 Objectives

The objectives of this PIR are to:



SOUTHERN OKANAGAN SECONDARY SCHOOL
School District No. 53 (Okanagan Similkameen)
POST FIRE DESTRUCTION – PROJECT IDENTIFICATION REPORT (PIR)

- Assess the physical condition of the existing school and systems after the fire;
- Identify viable options for rapid completion of the project, taking into account the remaining buildings and the Ministry of Education Guidelines for new construction, previously designated as renovation of existing space, that was destroyed in the fire;
- Develop viable schematic site and floor plans for each option;
- Provide schematic cost estimates for each option;
- Draw conclusions and make a recommendation for a preferred option;

1.3 PIR Team

The consultant team assembled by SD No. 53 (Okanagan Similkameen) to undertake the PIR includes the following:

- Mr. Mitch van Aller, Director of Operations, SD No. 53 (Okanagan Similkameen)
- Quantity Surveyor (Report Author) – SSA Quantity Surveyors Ltd, (Tim Spiegel, B.Sc.(QS), PQS, MRICS and Paul Mitchell, B.Sc.(QS), PQS, MRICS).
- Architect – KMBR Architects in joint venture with CEI Architecture (Gregg Brown, MAIBC and Nick Bevanda, MAIBC).
- Structural Engineer – CWMM (Michael Weilmeier).
- Electrical Engineer – Falcon (Geoff Hann).
- Mechanical Engineer – Stantec (Steve Woodmass).



2.0 Background Information

Site Description and Project Rationale

The existing site is located at 10332 - 350th Avenue, Oliver and is in a mainly residential neighbourhood.

Subsequent to the fire, the new building that was in the process of being constructed and which was almost complete and was largely unaffected by the fire, is in the ongoing process of being completed by the general contractor engaged under a fixed price contract for that portion of the work. The remainder of that contract cannot, obviously, be fulfilled as it contemplated the renovation of existing buildings that were burned to their foundations.

The original design for the project included renovation of existing space which included a community theatre that has been a part of the school for many years.

The existing classroom space, originally designated for renovation, was greater in area than what is currently allowable by the Ministry of Education for a replacement school of the same nominal capacity. Consequently, this PIR reviews the options that are now available to the School District to build new space within the area allowances under the Ministry of Education Guidelines, in combination with the existing spaces in which renovations were already completed and which were not affected by the fire, as well as the new spaces that were almost completed and not affected by the fire.

For this exercise, the Base Option, identified as Option 1, is the rebuild of the school at the same area that originally existed before the fire (which exceeds the allowable) and in the same configuration that was burned down. To be clear, this is done only to draw comparisons with the other options to indicate what the differences are between trying to replace exactly what was destroyed in the fire and the other options that are now available. **This PIR clearly indicates that Option 1 is not an economically nor practically feasible option.**

Facility Program/Planning and Relationships

This section reviews the uses of the existing spaces and their suitability to deliver programs.

- No parts of the existing school affected by the fire, except for the foundations, remain.
- The Ministry of Education allowable area for a new Secondary School with a 550 Nominal Capacity is 6,500m². With an additional 15% (975m²) allocated towards a Neighbourhoods of Learning Centre the total is 7,475m².
- The foundations and basement that remained after the fire will be removed to make way for the new construction.
- The main mechanical systems for the project intended to feed the entire building which are in the new building, were almost completed and were unaffected by the fire leading to the strong recommendation



SOUTHERN OKANAGAN SECONDARY SCHOOL
School District No. 53 (Okanagan Similkameen)
POST FIRE DESTRUCTION – PROJECT IDENTIFICATION REPORT (PIR)

that the new build continue with the same mechanical system design so that the new heating and cooling systems already installed are fully and functionally used.

As part of this PIR process, it was important to identify which areas of the building that exist and are required are compared to the areas required to now be provided to make the school whole. The PIR team has developed the following table to clearly show what areas are:

- Existing space in which renovations are completed and nothing further is required.
- New space which is completed or almost completed and for which nothing further is required.
- New and required as a result of the fire.

The Neighbourhoods of Learning Component (NLC) has been calculated as 15% of the 6,500m² allowable area of a 550 student secondary school resulting in an area of 975m². This is then reduced by 165m² as an NLC contribution to the theatre space for the NLC functions that will be accommodated in the theatre.

The Theatre area has been calculated based upon 264 seats resulting in a theatre area of 1,511m² (the same area as the theatre destroyed by the fire). This area is then reduced by 435m² which is an area contribution from the school for the music and drama components, and further reduced by the 165m² area from the NLC, resulting in a net theatre area (for budget purposes) of 911m².

Please refer to the table on the following page.

Please also refer to the Detailed Design Aid Sheets for each option which are included in this report.



SOUTHERN OKANAGAN SECONDARY SCHOOL
School District No. 53 (Okanagan Similkameen)
POST FIRE DESTRUCTION – PROJECT IDENTIFICATION REPORT (PIR)

Functional Area as described on Design Aid Sheets	Existing or New	Completed or Required	Existing Area	Allowable New	Comment	New Construction Required
Art	Existing	Completed	137	140		0
Business Education	Existing	Completed	137	120		0
Construction	Existing	Completed	351	275		0
Gym Activity	Existing	Completed	753	750		0
Gym Ancillary	Existing	Completed	191	150		0
Home Economics	Existing	Completed	57	57	0.3 Module	0
Metal	Existing	Completed	241	200		0
Multi-Purpose	Existing	Completed	274	240		0
Power Mechanics	Existing	Completed	281	230		0
Technology	Existing	Completed	91	91	0.7 Module	0
Sub-Total	Existing		2,513	2,253		0
Administration/Health	New	Required	0	240	290 Required. Deficit of 50.	290
Classrooms	New	Required	0	800	10 modules	800
Counselling	New	Required	0	50		50
Drama	New	Required	0	150		150
Food/Textiles	New	Required	0	160		160
General Storage	New	Required	0	90		90
Media/Tech	New	Required	0	320		320
Music	New	Required	0	180		180
Science	New	Completed	501	560	560 Allowable (2 modules only 1.6 built) - only 501 built new. Deficit of 59	59
Special Education	New	Required	0	180		180
Sub-Total			3,014	4,983		2,279
Allowable Mechanical Space (3%)						68
Design Space (28%)						657
TOTAL NEW SPACE						3,005
Neighbourhoods of Learning						
15% of a new 550 Student Secondary School is allowable						
Total Allowable area of a 550 Student Secondary School is 6,500m ²						
Neighbourhoods of Learning Gross Allowable area						975
Deduct for Contribution to Theatre						-165
Neighbourhoods of Learning Allowable area						810



3.0 Development Options:

A series of different options were developed for this PIR, resulting in the following Options that are considered reasonable given the circumstances, except for Option 1 which, as described in the introduction to this PIR, is included only to draw comparisons with the other options to indicate what the differences are between trying to replace exactly what was destroyed in the fire and the other options that are now available.

- **Option 1** – Rebuild exactly what was destroyed by the fire. The fire destroyed about 60% of the existing school building.
- **Option 4A** – A new academic wing, 264 seat theatre and Neighbourhoods of Learning Centre in a rectilinear shape in the location of the building that was destroyed in the fire.
- **Option 5A** – A new academic wing and Neighbourhoods of Learning Centre in a **standard rectilinear shape**, with a 264 seat theatre at a 45 degree angle at the corner of the rectilinear configuration in the location of the building that was destroyed in the fire. The Neighbourhoods of Learning Centre to be in a separate building linked to the theatre with a utilidor.
- **Option 5B** – A new academic wing and Neighbourhoods of Learning Centre in an **articulated rectilinear shape**, with a 264 seat theatre at a 45 degree angle at the corner of the rectilinear configuration in the location of the building that was destroyed in the fire. The Neighbourhoods of Learning Centre to be in a separate building linked to the theatre with a utilidor.



SOUTHERN OKANAGAN SECONDARY SCHOOL
School District No. 53 (Okanagan Similkameen)
POST FIRE DESTRUCTION – PROJECT IDENTIFICATION REPORT (PIR)

3.1 OPTION 1

Please refer to the following site plan.

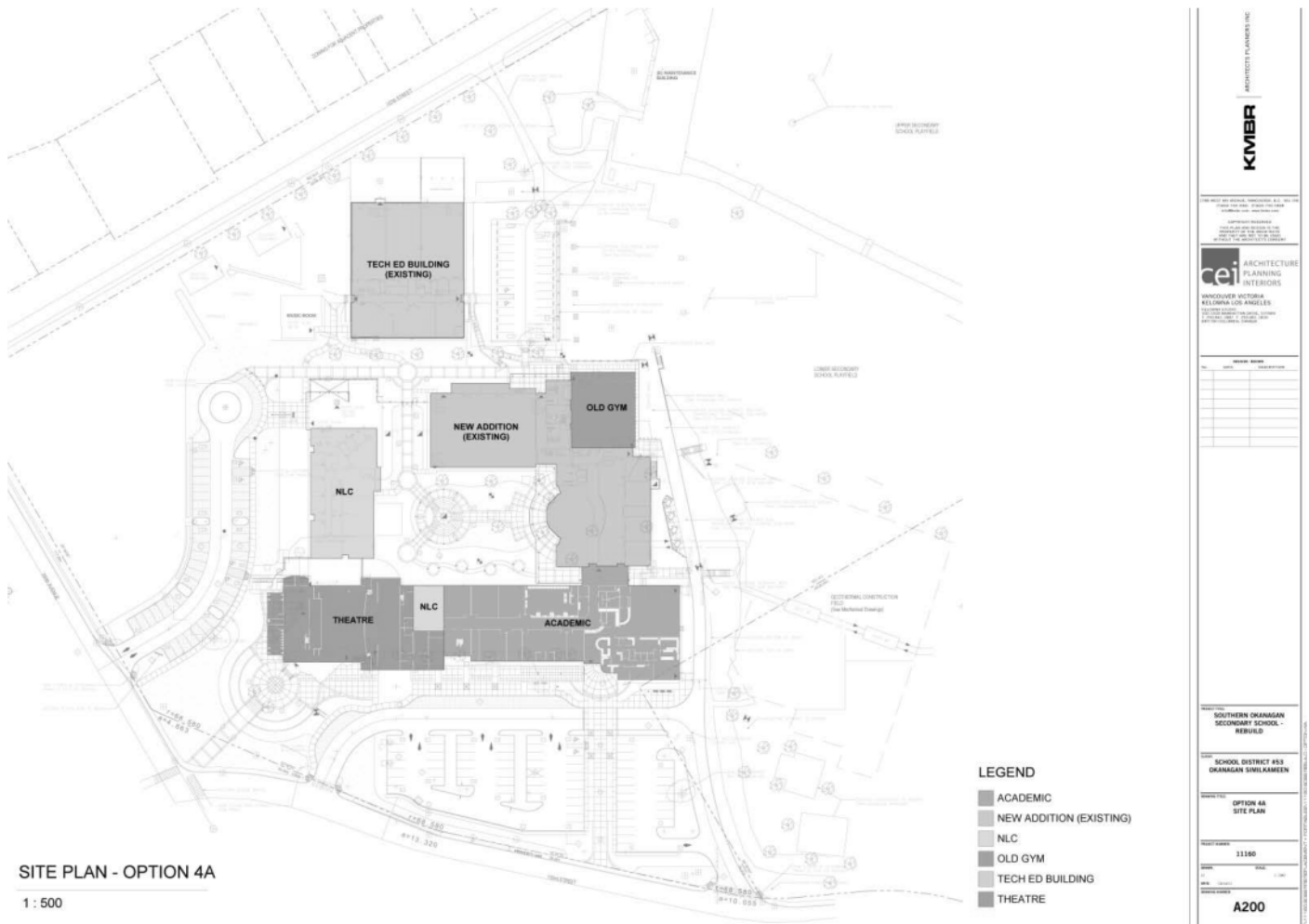




SOUTHERN OKANAGAN SECONDARY SCHOOL
School District No. 53 (Okanagan Similkameen)
POST FIRE DESTRUCTION – PROJECT IDENTIFICATION REPORT (PIR)

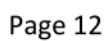
3.2 OPTION 4A

Please refer to the following site plan.





Please refer to the following site plan.

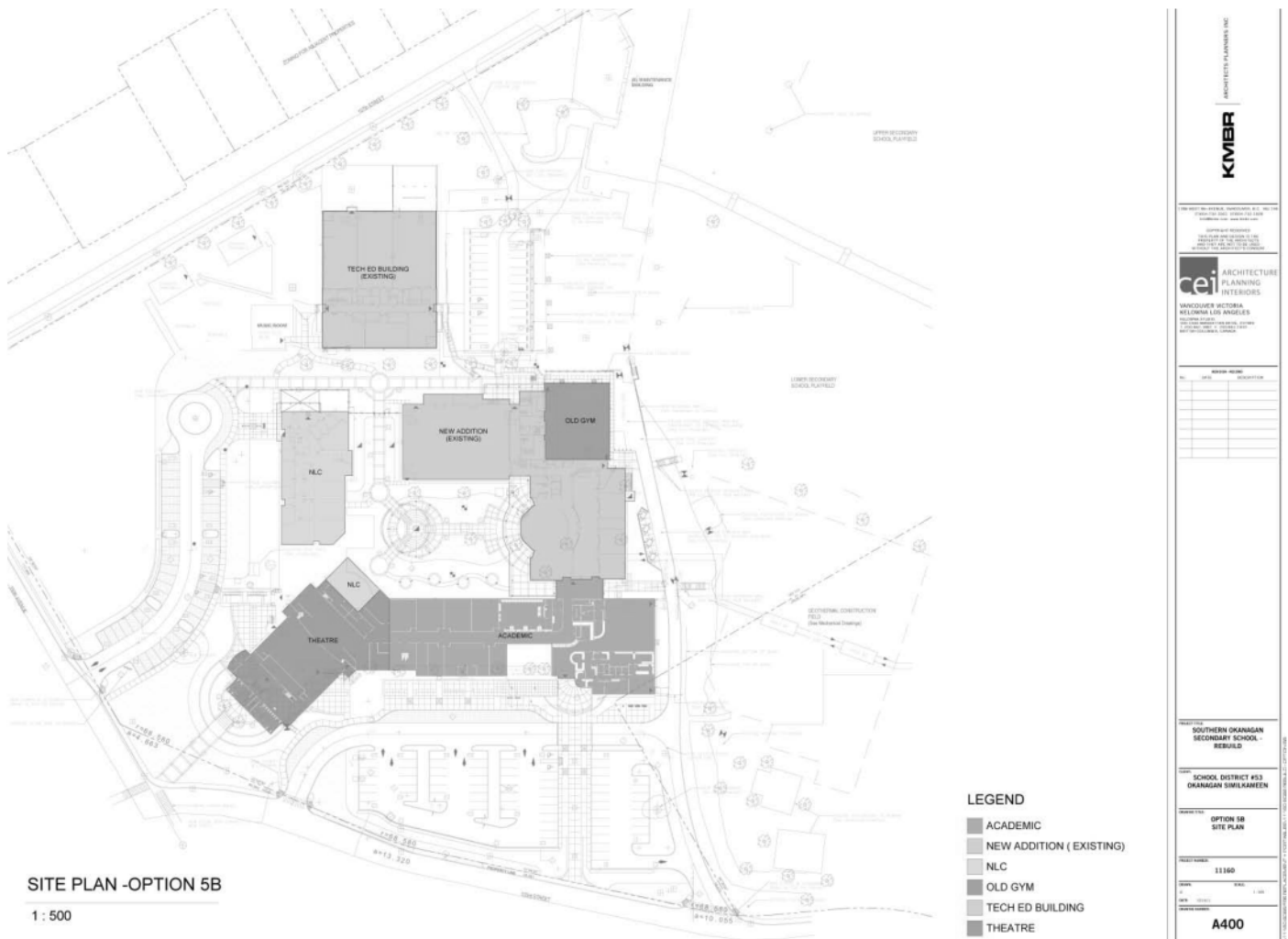




SOUTHERN OKANAGAN SECONDARY SCHOOL
School District No. 53 (Okanagan Similkameen)
POST FIRE DESTRUCTION – PROJECT IDENTIFICATION REPORT (PIR)

3.4 OPTION 5B

Please refer to the following site plan.





SOUTHERN OKANAGAN SECONDARY SCHOOL
School District No. 53 (Okanagan Similkameen)
POST FIRE DESTRUCTION – PROJECT IDENTIFICATION REPORT (PIR)

4.0 Partnership Opportunities

There is a continuing partnership between the School District and the community for the construction of the theatre. The Community has committed to providing a total of \$3,800,000 of which \$1,500,000 had, at the time of the fire, already been contributed.

5.0 Project Procurement

Due to the existing circumstance where there is already a general contractor on the site completing work on the unaffected new building and who is also assisting with post fire cleanup and making the site safe, it is anticipated that the project will be handled on a fee for service construction managed basis with the School District in control of the process, assisted by the design team and by the Quantity Surveyor who will run the commercial management side of the construction management process ensuring that all trade work is, where possible, competitively tendered. In some instances, and in order to try to maintain continuity, specific site knowledge and warranty, it may be necessary for existing trade contractors (likely Electrical and Mechanical) to be retained. In these cases, these trade contractors will be required to work on an open book basis handled on a day to day basis by the Quantity Surveyor to ensure fair value and that all discounts that may apply are in fact applied.

Thus, the preferred method of procurement will be Construction Management on a fee for service basis using a CCA Document 5 with proper Supplementary General Conditions together with CCA Document 17 for the Trade Contracts.

Design/Build as a procurement option was considered, but rejected for the following reasons:

- The project was in progress with a completed design. This design includes a mechanical system, a large part of which is already installed in the new building and which will be extended to the new part of the building.
- The general contractor on site will have to provide the appropriate warranties as required by the CCDC2 contract.
- The major trades under the general contractor will be required to provide the appropriate warranties as required by the CCDC2 contract.
- The introduction of a design/build form of procurement on this project will likely have the effect of seriously extending the project time frame as the current project was not procured on this basis. The construction management approach allows the project team to get going very quickly.
- The introduction of design/build will transfer risk to the design/build proponents who will have to cover this risk in their financial submissions. The budget, currently proposed shows these risks below the line. For the Design/Build, these values will have to be brought above the line and will be spent regardless. In this particular situation, the construction management process, properly handled has the potential of not having to spend these risk values.



SOUTHERN OKANAGAN SECONDARY SCHOOL
School District No. 53 (Okanagan Similkameen)
POST FIRE DESTRUCTION – PROJECT IDENTIFICATION REPORT (PIR)

6.0 Risk Assessment

Risk Assessment has been completed and the proposed capital budget has taken into account those risk items that have been identified. In addition, the budget has allowed a value for “unknown unknowns” which are highly likely to arise due to the fire destruction but which have not yet been encountered.

There is a high risk associated with removal of the damaged slab on grade and the structural slabs affected by fire as the condition of the services and the soils below will likely have been affected by the intense heat of the fire.

7.0 Cost Estimates

The Initial Capital Cost Estimates for each Option (including all risk items) are as follows:

	Excluding Reserves	Including Reserves
Option 1 (Original Option)	\$26,869,123	\$29,200,212
Option 4A	\$23,209,003	\$25,423,106
Option 5A (Preferred)	\$22,673,755	\$24,863,152
Option 5B	\$23,286,886	\$25,504,546

Details are contained in an Appendix in this Report.

We highlight here some of the assumptions that are contained in the Capital Cost Estimates:

- Neighbourhoods of Learning. The area has been derived as 15% of the allowable area of 15% of a new 550 student secondary school. The value of 975m² so calculated is then reduced by 165m² as a contribution to the Theatre leaving an NLC area of 810m². The budget value for the NLC is derived by applying the secondary unit rate for the school, reduced by 20%, then adding 10% for Fees, 5% for Contingency and 50% of the allowable value for secondary equipment.
- The Theatre. Area is 1,946m² less 435m² which is a contribution from the school area (music and drama). The budget value is calculated by applying an “all-in” unit rate of \$4,500/m² to the net area of 1,511m².
- Building Permit value - as per Municipal By-Law.
- Site Development - as per original budget.
- Supplementary Site Costs.
 - Retaining Walls.
 - Remediation of existing rock pits adjacent to the building.
 - Remediation of acid tank damaged by fire.
 - Repair main entry canopy.



SOUTHERN OKANAGAN SECONDARY SCHOOL
School District No. 53 (Okanagan Similkameen)
POST FIRE DESTRUCTION – PROJECT IDENTIFICATION REPORT (PIR)

- Remove and replace hard exterior surfaces.
- Remove and replace exterior ramps, stairs etc.
- Supplementary utility connection fees.
- Utilidor for NLC from main building to NLC.
- Supplementary Building Costs.
 - Allowance for Phasing.
 - Interface between new and existing completed building.
 - Rebuild existing basement.
 - Demolish existing burned out structure.
 - Relocate electrical room, emergency generator etc. (equipment salvaged)
 - Relocate electrical equipment, generator etc.
 - Allowance to regain warranty on installed items or buy equivalent insurance.
- Construction Contingency. 5% of the New Construction and Site Development values.
- Temporary Accommodation. \$10,000 per month for 24 months.
- LEED Gold. 3% above the line. 2% as a reserve below the line.
- Escalation Allowance. 2% below the line.
- Change from HST back to PST/GST. 2.8% below the line.
- Allowance for “unknown unknowns”. \$500,000 below the line.

Unit rate Calculation as follows:

Unit Rate for Construction as per Ministry Guidelines	
Base Unit Rate	1,065.00
Project size factor (see calc below)	1.0550
Base Unit Rate x Project size factor	1,123.60
Air Conditioning	40.00
Subtotal	1,163.60
Location factor - 1st Quarter 2011	2.13
Unit rate (Subtotal x Location factor)	2,478.46

Project Size factor - Ministry Guidelines Secondary		
Lower area	3,000	1.06
Upper area	4,000	1.05
Actual Size	3,498	0.01
Calculated Area above Lower Value	498	0.005
Calculated Project Size Factor		1.0550



Option Review & Recommendations

7.1 Option 1

Positive Issues:

- This Option has been included as a baseline only.
- Allows original site development plans to be reused.
- Retains heritage footprint and massing of original school.
- Basement space helps to accommodate needed Special Ed programs.

Negative issues:

- Most expensive option.
- Exceeds the allowable areas.
- More site coverage than the other options.
- Central Courtyard only directly accessible from SW corner.
- Undersized classrooms (7 are less than 75m²) and Foods/Textiles Room & NLC undersized

7.2 Option 4A

Positive Issues:

- Provides the Ministry of Education allowable areas.
- Has a compact footprint with efficient wall to floor area ratio.
- Provides expansion ability.
- Is a rectilinear configuration.
- Access to the central courtyard area is restricted.
- Site lines to the central courtyard are severely restricted. Central Courtyard directly accessible from SW and SE corners. Placement of the Neighbourhoods of Learning is separated from the theatre to allow for a second exit from the courtyard.
- More efficient layout (more compact), with less Design Space than Option 1.
- More functional theatre layout than Option 1 with better lobby, backstage areas and smaller more appropriately sized audience chamber. NLC Performance area can be directly accessed from school
- Shallow classrooms get good daylight.
- NLC larger.
- Option 4A incorporates the existing planning for the administration and Library.
- Classroom block is organized efficiently with short dimension of classrooms against the corridor.
- Construction of Theatre is adjacent to the classroom block and is easily accessible by the students.
- Entry lobby of the theatre is located close to the street. The stage is located accessible to student classroom block for Drama and Dance classes.
- NLC incorporates the existing planning, proposed with the original scheme.
- The majority of the site parking and landscaping remain intact. The siting of the building allows for maximum parking around the perimeter of the site.
- The placement of the east wing and NLC define the central courtyard as intended by the original building.



SOUTHERN OKANAGAN SECONDARY SCHOOL
School District No. 53 (Okanagan Similkameen)
POST FIRE DESTRUCTION – PROJECT IDENTIFICATION REPORT (PIR)

- Placement of the NLC allows for separation from the remainder of the high school.

Negative Issues:

- More expensive than Option 5A.
- Requires some reworking of site development plans.
- Special Ed programs not fully accommodated.
- Counselling undersized for current needs.
- The east wing architecture is long and potentially uninteresting.
- Future expansion is complicated and limited.

7.3 Option 5A

Positive Issues:

- Least expensive option.
- Provides the Ministry of Education allowable areas.
- Is a rectilinear and angular configuration.
- Has a compact footprint with efficient wall to floor area ratio.
- Provides expansion ability.
- Access to the central courtyard area is open.
- Site lines to the central courtyard are open. Central Courtyard directly accessible from SW and SE corners. Placement of the NLC is separated from the theatre to allow for a second exit from the courtyard.
- More functional theatre layout than Option 1 with better lobby, backstage areas and smaller more appropriately sized audience chamber.
- More efficient layout (more compact), with less Design Space than Option 1
- Theatre orientation references the prominent theatre placement in the original school massing.
- NLC larger.
- Option 4A incorporates the existing planning for the administration and Library.
- Classroom block is organized efficiently with short dimension of classrooms against the corridor.
- Construction of Theatre is adjacent to the classroom block and is easily accessible by the students. The theatre is turned 45 degrees to better address the corner and break up the long façade of the classroom.
- Entry lobby of the theatre is located close to the street. The stage is located accessible to student classroom block for Drama and Dance classes.
- NLC incorporates the existing planning, proposed with the original scheme.
- The majority of the site parking and landscaping remain intact. The siting of the building allows for maximum parking around the perimeter of the site.
- The placement of the east wing and NLC define the central courtyard as intended by the original building.
- Placement of the NLC allows for separation from the remainder of the high school.

Negative Issues:

- Requires some reworking of site development plans.



SOUTHERN OKANAGAN SECONDARY SCHOOL
School District No. 53 (Okanagan Similkameen)
POST FIRE DESTRUCTION – PROJECT IDENTIFICATION REPORT (PIR)

- Special Ed programs not fully accommodated.
- Counselling undersized for current needs.
- Future expansion is limited.
- Access to NLC space within the theatre, is not easily accessible from the corridor.

7.4 Option 5B

- Provides the Ministry of Education allowable areas.
- Is a rectilinear and angular configuration.
- Has a less compact footprint with lesser efficient wall to floor area ratio.
- Provides expansion ability.
- Access to the central courtyard area is open.
- Site lines to the central courtyard are open. Central Courtyard directly accessible from SW and SE corners. Placement of the Neighbourhoods of Learning is separated from the theatre to allow for a second exit from the courtyard.
- Best option for accommodating future school expansion.
- More efficient layout (more compact), with less Design Space than Option 1.
- More functional theatre layout than Option 1 with better lobby, backstage areas and smaller more appropriately sized audience chamber.
- Theatre orientation references the prominent theatre placement in the original school massing.
- Courtyard next to Main Entry Lobby will reinforce this location as the heart of the school and provide Counselling Offices with exterior windows.
- NLC larger.
- Option 4A incorporates the existing planning for the administration and Library.
- Classroom block is organized efficiently with short dimension of classrooms against the corridor.
- Construction of Theatre is adjacent to the classroom block and is easily accessible by the students. The theatre is turned 45 degrees to better address the corner and break up the long façade of the classroom.
- Entry lobby of the theatre is located close to the street. The stage is located accessible to student classroom block for Drama and Dance classes
- NLC incorporates the existing planning, proposed with the original scheme.
- The majority of the site parking and landscaping remain intact. The siting of the building allows for maximum parking around the perimeter of the site.
- The placement of the east wing and NLC define the central courtyard as intended by the original building.
- Placement of the NLC allows for separation from the remainder of the high school.
- Future expansion is planned into the scheme and is easily accomplished.

Negative Issues:

- Requires some reworking of site development plans, but less than Options 4A and 5A.
- Special Ed programs not fully accommodated.
- Counselling undersized for current needs.
- More site coverage than Options 4A and 5A.



SOUTHERN OKANAGAN SECONDARY SCHOOL
School District No. 53 (Okanagan Similkameen)
POST FIRE DESTRUCTION – PROJECT IDENTIFICATION REPORT (PIR)

- Access to NLC space within the theatre, is not easily accessible from the corridor.

8.0 Recommendation

Option 1 is significantly more expensive than the other Options and provides spaces that are far greater than those currently allowed by the Ministry of Education. **It has been rejected as a feasible option.**

Although Options 4A, 5A and 5B are similar in cost, **Option 5A** is preferred due to its compact and efficient footprint, it's open access to the courtyard and it's ability to allow for expansion. It provides the allowable area per the current Ministry of Education guidelines, it can be phased during construction, and assists the preferred procurement method of construction management.

Based upon this investigative study, the PIR Team recommends that Option 5A be implemented for the Southern Okanagan Secondary School project post fire restoration project using construction management as the method of project procurement.



**SOUTHERN OKANAGAN SECONDARY SCHOOL
School District No. 53 (Okanagan Similkameen)
POST FIRE DESTRUCTION – PROJECT IDENTIFICATION REPORT (PIR)**

9.0 Capital Cost Estimates

Capital Project Financial Summary

Schedule B

School Name:		South Okanagan Secondary School		
Project No:		113849		
Project Description:		550 Student Grade 8 to 12 - POST FIRE DESTRUCTION - OPTION 1		

Nominal Capacity	Kindergarten	Grades 1 - 7	Grades 8 - 12	Grade Configuration
Existing				
Approved				
Additional				

A R E A - U N I T R A T E	Allowable Site Area (ha)		
	Allowable Building Area (sqm)		
	Total Allowable Area		0
	Less: Previously Existing Space		0
	Add: Area to be Demolished		0
	Area of New Space		3,498
	Allowable Area of Renovations		0
	Unit Rate for Construction (\$/sqm) (based on 1 st Quarter 2011 Location Factor and using Ministry Unit Rates)		
	New		\$2,489.65
	Renovation		

PROJECT BUDGET		REVISED PROJECT AGREEMENT	Amounts Subject to Economic Adjustment
1	Site Acquisition	\$0	\$0.00
2	Site Development	\$1,438,944	\$1,438,944.00
3	New Construction:	\$8,669,653	\$8,669,653.50
4	Renovation	\$0	\$0.00
5	Design Fees and Disbursements	\$1,341,100	\$1,341,099.89
6	Construction Contingency	\$505,430	\$505,429.87
7	Equipment	\$1,557,825	\$1,557,824.50
8	Municipal Permits & Fees	\$78,000	\$78,000.00
Documented Supplementary Items (including fees and related costs)			
9	Supplementary Site	\$577,789	\$577,788.75
10	Supplementary Building	\$2,724,613	\$2,724,612.66
11	Off-Site Costs	\$0	\$0.00
12	LEED® Gold (3%)	\$260,090	\$260,089.60
13	List of Other Budget Items:		
	i. Feasibility Costs - Revised PIR etc. after fire destruction	\$50,000	\$50,000.00
	ii. Temporary Accommodation - Increased operating costs	\$240,000	\$240,000.00
	iii. Neighbourhoods of Learning	\$1,968,279	\$1,968,279.04
	iv. Theatre	\$6,799,500	\$6,799,500.00
	v.	\$0	\$0.00
	vi.	\$0	\$0.00
14	Sub-Total	\$26,211,222	
15	HST	12.00%	\$3,145,347
16	HST Rebate - Federal Portion	28.33% (68% of five twelfths)	-\$891,182
17	HST Rebate - Provincial Portion	50.75% (87% of seven twelfths)	-\$1,596,263
(A)	Total Project Budget (excluding Reserve Items)	\$26,869,123	
(B)	Total Project Budget Eligible for Economic Adjustment		\$26,211,221.82
RESERVE ITEMS (as per Schedule C - Reserve Items)			
List of Identified Risks			
	1. Escalation Allowance	\$537,382	
	2. Sustainability Initiatives	\$694,313	
	3. LEED Gold (2%)	\$173,393	
	4. Change from HST to PST/GST	\$426,000	
	5. Unknown unknowns	\$500,000	
	6	\$0	
(C)	Maximum "Not to Exceed" Contingency	Sub-Total	\$2,331,088
(D)	Estimated Economic Adjustment (from Location Factor 1 st Quarter 2011 to Mid-Point of Construction)		\$2,131,036.35
(E)	Total Reserve Items	\$2,331,088	[=C+D]
(F)	MAXIMUM POTENTIAL PROJECT COST (including Reserve Items)	\$29,200,212	[=A+E]

F U N D I N G S O U R C E S	(G)	Capital Plan [as per Capital Project Funding Agreement, subparagraph 3.01(a)]	\$24,569,123	
	(H)	Ministry of Education Restricted Capital [as per paragraph 3.04]		
	(I)	Borrowing [as per paragraph 3.05]		
	(J)	Local Capital Reserve [as per subparagraph 4.02(e)]		
	(K)	Annual Facility Grant [as per subparagraph 4.02(e)]		
		Other (specify) [as per subparagraph 4.02(e)] - Contribution to Theatre from local community (\$3,800,000 less \$1,500,000 already contributed prior to the fire)	\$2,300,000	
	(L)	Sub-Total	\$26,869,123	[=A]
	(M)	Capital Plan - Identified Risks [as per sub-paragraph 3.01(b)]	\$2,331,088	[=C]
	(N)	Capital Plan - Estimated Economic Adjustment [as per subparagraph 3.01(c)]	\$0	[=D]
		Sub-Total	\$2,331,088	[=E]
(O)	MAXIMUM POTENTIAL PROJECT FUNDING (includes Lines G, H, I, J, K, L, M and N)	\$29,200,212	[=F]	

Capital Project Financial Summary

Schedule B

School Name:		South Okanagan Secondary School		
Project No:		113849		
Project Description:		550 Student Grade 8 to 12 - POST FIRE DESTRUCTION - OPTION 4A		

Nominal Capacity	Kindergarten	Grades 1 - 7	Grades 8 - 12	Grade Configuration
Existing				
Approved				
Additional				

A R E A - U N I T R A T E	Allowable Site Area (ha)		
	Allowable Building Area (sqm)		
	Total Allowable Area		0
	Less: Previously Existing Space		0
	Add: Area to be Demolished		0
	Area of New Space		3,005
	Allowable Area of Renovations		0
	Unit Rate for Construction (\$/sqm) [based on 1 st Quarter 2011 Location Factor and using Ministry Unit Rates]		
	New		\$2,489.65
	Renovation		

E L I G I B L E E X P E N D I T U R E S	PROJECT BUDGET		REVISED PROJECT AGREEMENT	Amounts Subject to Economic Adjustment
	1 Site Acquisition		\$0	\$0.00
	2 Site Development		\$1,438,944	\$1,438,944.00
	3 New Construction:		\$7,480,492	\$7,480,491.72
	4 Renovation		\$0	\$0.00
	5 Design Fees and Disbursements		\$1,270,399	\$1,270,399.19
	6 Construction Contingency		\$445,972	\$445,971.79
	7 Equipment		\$1,557,825	\$1,557,824.50
	8 Municipal Permits & Fees		\$72,000	\$72,000.00
	Documented Supplementary Items (including fees and related costs)			
	9	Supplementary Site	\$943,058	\$943,057.50
	10	Supplementary Building	\$2,841,499	\$2,841,498.66
	11	Off-Site Costs	\$0	\$0.00
	12	LEED [®] Gold (3%)	\$224,415	\$224,414.75
	13 List of Other Budget Items:	i. Feasibility Costs - Revised PIR etc. after fire destruction	\$50,000	\$50,000.00
		ii. Temporary Accommodation - Increased operating costs	\$240,000	\$240,000.00
		iii. Neighbourhoods of Learning	\$1,976,619	\$1,976,619.15
		iv. Theatre	\$4,099,500	\$4,099,500.00
		v.	\$0	\$0.00
		vi.	\$0	\$0.00
	14 Sub-Total		\$22,640,721	
	15 HST	12.00%	\$2,716,887	
	16 HST Rebate - Federal Portion	28.33% (68% of five twelfths)	-\$769,785	
	17 HST Rebate - Provincial Portion	50.75% (87% of seven twelfths)	-\$1,378,820	
	(A) Total Project Budget (excluding Reserve Items)		\$23,209,003	
(B) Total Project Budget Eligible for Economic Adjustment			\$22,640,721.26	
RESERVE ITEMS (as per Schedule C - Reserve Items)				
List of Identified Risks				
	1. Escalation Allowance	\$464,180		
	2. Sustainability Initiatives	\$694,313		
	3. LEED Gold (2%)	\$149,610		
	4. Change from HST to PST/GST	\$406,000		
	5. Unknown unknowns	\$500,000		
	6	\$0		
(C) Maximum "Not to Exceed" Contingency		Sub-Total \$2,214,102		
(D) Estimated Economic Adjustment (from Location Factor 1 st Quarter 2011 to Mid-Point of Construction)			\$2,131,036.35	
(E) Total Reserve Items		\$2,214,102	[=C+D]	
(F) MAXIMUM POTENTIAL PROJECT COST (including Reserve Items)		\$25,423,106	[=A+E]	

F U N D I N G S O U R C E S	(G) Capital Plan [as per Capital Project Funding Agreement, subparagraph 3.01(a)]	\$20,909,003	
	(H) Ministry of Education Restricted Capital [as per paragraph 3.04]		
	(I) Borrowing [as per paragraph 3.05]		
	(J) Local Capital Reserve [as per subparagraph 4.02(e)]		
	(K) Annual Facility Grant [as per subparagraph 4.02(e)]		
	Other (specify) [as per subparagraph 4.02(e)] - Contribution to Theatre from local community (\$3,800,000)		
	(L) less \$1,500,000 already contributed prior to the fire	\$2,300,000	
	Sub-Total	\$23,209,003	[=A]
	(M) Capital Plan - Identified Risks [as per sub-paragraph 3.01(b)]	\$2,214,102	[=C]
	(N) Capital Plan - Estimated Economic Adjustment [as per subparagraph 3.01(c)]	\$0	[=D]
Sub-Total	\$2,214,102	[=E]	
(O) MAXIMUM POTENTIAL PROJECT FUNDING (includes Lines G, H, I, J, K, L, M and N)		\$25,423,106	[=F]

Capital Project Financial Summary

Schedule B

School Name:		South Okanagan Secondary School		
Project No:		113849		
Project Description:		550 Student Grade 8 to 12 - POST FIRE DESTRUCTION - OPTION 5A		

Nominal Capacity	Kindergarten	Grades 1 - 7	Grades 8 - 12	Grade Configuration
Existing				
Approved				
Additional				

A R E A - U N I T R A T E	Allowable Site Area (ha)	
	Allowable Building Area (sqm)	
	Total Allowable Area	0
	Less: Previously Existing Space	0
	Add: Area to be Demolished	0
	Area of New Space	3,005
	Allowable Area of Renovations	0
	Unit Rate for Construction (\$/sqm) [based on 1 st Quarter 2011 Location Factor and using Ministry Unit Rates]	
	New	\$2,489.65
	Renovation	

E L I G I B L E E X P E N D I T U R E S	PROJECT BUDGET		REVISED PROJECT AGREEMENT	Amounts Subject to Economic Adjustment
	1 Site Acquisition		\$0	\$0.00
	2 Site Development		\$1,438,944	\$1,438,944.00
	3 New Construction:		\$7,480,492	\$7,480,491.72
	4 Renovation		\$0	\$0.00
	5 Design Fees and Disbursements		\$1,223,113	\$1,223,113.49
	6 Construction Contingency		\$445,972	\$445,971.79
	7 Equipment		\$1,557,825	\$1,557,824.50
	8 Municipal Permits & Fees		\$70,000	\$70,000.00
	Documented Supplementary Items (including fees and related costs)			
	9	Supplementary Site	\$737,179	\$737,178.75
	10	Supplementary Building	\$2,574,520	\$2,574,520.41
	11	Off-Site Costs	\$0	\$0.00
	12	LEED® Gold (3%)	\$224,415	\$224,414.75
	13 List of Other Budget Items:			
		i. Feasibility Costs - Revised PIR etc. after fire destruction	\$50,000	\$50,000.00
		ii. Temporary Accommodation - Increased operating costs	\$240,000	\$240,000.00
		iii. Neighbourhoods of Learning	\$1,976,619	\$1,976,619.15
		iv. Theatre	\$4,099,500	\$4,099,500.00
		v.	\$0	\$0.00
		vi.	\$0	\$0.00
	14 Sub-Total		\$22,118,579	
	15 HST	12.00%	\$2,654,229	
	16 HST Rebate - Federal Portion	28.33% (68% of five twelfths)	-\$752,032	
	17 HST Rebate - Provincial Portion	50.75% (87% of seven twelfths)	-\$1,347,021	
(A)	Total Project Budget (excluding Reserve Items)	\$22,673,755		
(B)	Total Project Budget Eligible for Economic Adjustment		\$22,118,578.56	
RESERVE ITEMS (as per Schedule C - Reserve Items)				
	List of Identified Risks			
	1. Escalation Allowance	\$453,475		
	2. Sustainability Initiatives	\$694,313		
	3. LEED Gold (2%)	\$149,610		
	4. Change from HST to PST/GST	\$392,000		
	5. Unknown unknowns	\$500,000		
	6	\$0		
(C)	Maximum "Not to Exceed" Contingency	Sub-Total	\$2,189,397	
(D)	Estimated Economic Adjustment (from Location Factor 1 st Quarter 2011 to Mid-Point of Construction)		\$2,131,036.35	
(E)	Total Reserve Items	\$2,189,397	[=C+D]	
(F)	MAXIMUM POTENTIAL PROJECT COST (including Reserve Items)	\$24,863,152	[=A+E]	

F U N D I N G S O U R C E S	(G)	Capital Plan [as per Capital Project Funding Agreement, subparagraph 3.01(a)]	\$20,373,755	
	(H)	Ministry of Education Restricted Capital [as per paragraph 3.04]		
	(I)	Borrowing [as per paragraph 3.05]		
	(J)	Local Capital Reserve [as per subparagraph 4.02(e)]		
	(K)	Annual Facility Grant [as per subparagraph 4.02(e)]		
		Other (specify) [as per subparagraph 4.02(e)] - Contribution to Theatre from local community (\$3,800,000 less \$1,500,000 already contributed prior to the fire)	\$2,300,000	
	(L)	Sub-Total	\$22,673,755	[=A]
	(M)	Capital Plan - Identified Risks [as per sub-paragraph 3.01(b)]	\$2,189,397	[=C]
	(N)	Capital Plan - Estimated Economic Adjustment [as per subparagraph 3.01(c)]	\$0	[=D]
		Sub-Total	\$2,189,397	[=E]
(O)	MAXIMUM POTENTIAL PROJECT FUNDING (includes Lines G, H, I, J, K, L, M and N)	\$24,863,152	[=F]	

Capital Project Financial Summary

Schedule B

School Name:		South Okanagan Secondary School		
Project No:		113849		
Project Description:		550 Student Grade 8 to 12 - POST FIRE DESTRUCTION - OPTION 5B		

Nominal Capacity	Kindergarten	Grades 1 - 7	Grades 8 - 12	Grade Configuration
Existing				
Approved				
Additional				

A R E A - U N I T R A T E	Allowable Site Area (ha)	
	Allowable Building Area (sqm)	
	Total Allowable Area	0
	Less: Previously Existing Space	0
	Add: Area to be Demolished	0
	Area of New Space	3,005
	Allowable Area of Renovations	0
	Unit Rate for Construction (\$/sqm) (based on 1 st Quarter 2011 Location Factor and using Ministry Unit Rates)	
	New	\$2,489.65
	Renovation	

PROJECT BUDGET		REVISED PROJECT AGREEMENT	Amounts Subject to Economic Adjustment
1	Site Acquisition	\$0	\$0.00
2	Site Development	\$1,438,944	\$1,438,944.00
3	New Construction:	\$7,480,492	\$7,480,491.72
4	Renovation	\$0	\$0.00
5	Design Fees and Disbursements	\$1,277,306	\$1,277,306.09
6	Construction Contingency	\$445,972	\$445,971.79
7	Equipment	\$1,557,825	\$1,557,824.50
8	Municipal Permits & Fees	\$72,000	\$72,000.00
Documented Supplementary Items (including fees and related costs)			
9	Supplementary Site	\$1,009,470	\$1,009,470.00
10	Supplementary Building	\$2,844,155	\$2,844,155.16
11	Off-Site Costs	\$0	\$0.00
12	LEED [®] Gold (3%)	\$224,415	\$224,414.75
13	List of Other Budget Items:		
	i. Feasibility Costs - Revised PIR etc. after fire destruction	\$50,000	\$50,000.00
	ii. Temporary Accommodation - Increased operating costs	\$240,000	\$240,000.00
	iii. Neighbourhoods of Learning	\$1,976,619	\$1,976,619.15
	iv. Theatre	\$4,099,500	\$4,099,500.00
	v.	\$0	\$0.00
	vi.	\$0	\$0.00
14	Sub-Total	\$22,716,697	
15	HST	12.00%	\$2,726,004
16	HST Rebate - Federal Portion	28.33% (68% of five twelfths)	-\$772,368
17	HST Rebate - Provincial Portion	50.75% (87% of seven twelfths)	-\$1,383,447
(A)	Total Project Budget (excluding Reserve Items)	\$23,286,886	
(B)	Total Project Budget Eligible for Economic Adjustment		\$22,716,697.16
RESERVE ITEMS (as per Schedule C - Reserve Items)			
	List of Identified Risks		
	1. Escalation Allowance	\$465,738	
	2. Sustainability Initiatives	\$694,313	
	3. LEED Gold (2%)	\$149,610	
	4. Change from HST to PST/GST	\$408,000	
	5. Unknown unknowns	\$500,000	
	6	\$0	
(C)	Maximum "Not to Exceed" Contingency	Sub-Total	\$2,217,660
(D)	Estimated Economic Adjustment (from Location Factor 1 st Quarter 2011 to Mid-Point of Construction)		\$2,131,036.35
(E)	Total Reserve Items	\$2,217,660	[=C+D]
(F)	MAXIMUM POTENTIAL PROJECT COST (including Reserve Items)	\$25,504,546	[=A+E]

F U N D I N G S O U R C E S	(G)	Capital Plan [as per Capital Project Funding Agreement, subparagraph 3.01(a)]	\$20,986,886	
	(H)	Ministry of Education Restricted Capital [as per paragraph 3.04]		
	(I)	Borrowing [as per paragraph 3.05]		
	(J)	Local Capital Reserve [as per subparagraph 4.02(e)]		
	(K)	Annual Facility Grant [as per subparagraph 4.02(e)]		
		Other (specify) [as per subparagraph 4.02(e)] - Contribution to Theatre from local community (\$3,800,000 less \$1,500,000 already contributed prior to the fire)	\$2,300,000	
		Sub-Total	\$23,286,886	[=A]
	(M)	Capital Plan - Identified Risks [as per sub-paragraph 3.01(b)]	\$2,217,660	[=C]
	(N)	Capital Plan - Estimated Economic Adjustment [as per subparagraph 3.01(c)]	\$0	[=D]
		Sub-Total	\$2,217,660	[=E]
(O)	MAXIMUM POTENTIAL PROJECT FUNDING (includes Lines G, H, I, J, K, L, M and N)	\$25,504,546	[=F]	



**SOUTHERN OKANAGAN SECONDARY SCHOOL
School District No. 53 (Okanagan Similkameen)
POST FIRE DESTRUCTION – PROJECT IDENTIFICATION REPORT (PIR)**

10.0 Design Aid Sheets

DESIGN AID SHEET FOR SECONDARY SCHOOLS - SHEET #1

Grades:

8 - 12

OPTION 1

School Name: SOUTHERN OKANAGAN SECONDARY

Facility Code:

Date:

June 26, 2008

District: SD # 53 (Okanagan Similkameen)

School Capacity: • Nominal - 550 Total Elective Modules

Min 22 (22.9 shown)

• Operating -

Agreed Nominal / Operating Capacity:

Ministry of Education

Date

This sheet is for use in the design procedures in PART 2 of the Building Manual.

PART 1 - ACADEMIC / VOCATIONAL

Space Function	A1 - EXISTING			1B - MODULES			1C - NEW CORE			1D - NEW ELECTIVE		
	Description	Area	Mods	Core	Deficit	Surplus	Description	Area	Mods	Description	Area	Mods
Business Education	Bus. Ed/Digital Art	125.8	1.0	1.0	-	-						
Fine Arts	Art	165.5	1.0	1.0	-	3.0						
	Dance	441.6	1.0									
	Music	180	1.0									
	Drama @ 90%	135	1.0									
Home Economics	Food/Textiles	167.2	1.0	1.0	-	-						
Industrial Education	Construction	354.4	1.0	1.0	-	2.8						
	Metal	296	1.0									
	Power Mechanics	274.9	1.0									
	Technology	113.7	0.8									
Science				-	-	-				Science@140m2	420	3.0
										Science @ 90%	126	1.0
Other *				-	-	-						
General Instruction	(2) rooms 75-95	160.0	2.0	E: 7.0	-	2.1	Area = No. of modules X 80 m ²			Area = No. of modules x 80 m ²	0	0
	(9) Other rooms	569.4	7.1									
Sub-totals		2983.5				7.9					546	4.0
		Ai				Bi			Ci		Di	Dii

* Note - May not be used except for spaces agreed in writing by the Ministry.

DESIGN AID SHEET FOR SECONDARY SCHOOLS - SHEET #2

(See Sheet #1 for base information)

SOSS OPTION 1

June 26, 2008

PART 2 - SERVICE / ACTIVITY					PART 3 - TOTAL AREAS																	
Space Function	E - Existing	F - Allowable	G - Deficit	H - New			N - Existing		P - New													
Administration / Health	300	240	-	0	Existing Acad./Voc.		Ai2983.5															
Counselling	99.4	50	-	0																		
Gen. Storage	125.2	90	-	0	Core A/V Additions				Ci0													
Gym Activity	-	750	750	750	Elective A/V Additions				Di546													
Gym Ancillary	-	150	150	150	Service Activity		Ei2285.7		Hi1811													
Media / Tech. Centre	0	320	320	320	Sub-Total		5269.2		2357													
Multi-purpose	446	240	-	0	Total Gross Allowable Area (6500 m2)		<div>└───→</div>		Ni5269.2													
Special Education	210.6	180	-	0					7626.2													
Mechanical	208.2	150 or 3%	75	75																		
Design Space	896.3	1390 or 28%	516	516	<div>ENROLMENT: as of: 2015 projectedGrade Structure:</div> <table><tr><td>Kgn:</td><td>Gr. 1-7:</td><td>Gr. 8-12:</td><td>Type-1:</td><td>Type-2:</td><td>Port. CR's</td></tr><tr><td></td><td></td><td>550</td><td></td><td></td><td></td></tr></table>						Kgn:	Gr. 1-7:	Gr. 8-12:	Type-1:	Type-2:	Port. CR's			550			
Kgn:	Gr. 1-7:	Gr. 8-12:	Type-1:	Type-2:	Port. CR's																	
		550																				
* Other																						
Sub-Total	Ei2285.7	Fi		Hi1811	* Other:																	

Comments: [from June 2008]

This Design Aid Sheet is based on the Phase 1 Feasibility Study **Option B**, retaining the existing Tech Ed Building, West Gym and East Wing, and providing the remainder of the 550 capacity school in new construction. Partial demolition requires the renovation of various areas to suit the new building configuration.

Design Space:

- new design space = 28% x 1843m² = 516m²

Total Gross Area (new + existing program area) = 7626.2 m², exceeds the allowable for new construction (6500m²) due to inclusion of the existing auditorium, excessive design space in the existing buildings, existing oversized shops , and other existing specialty rooms being oversized

The existing West Gym is too small for use as a main secondary school gym and will be operated as unfunded space.

The existing basement is excluded from area calculations for occupied space because it is substandard space (i.e. low ceilings, limited glazing/views).

The existing Music Building is excluded from area calculations because it was built as a student project without MEd capital funding.

Eight of ten existing general classrooms are retained for general instruction, although they are less than 75m² in area.

DESIGN AID SHEET FOR SECONDARY SCHOOLS - SHEET #1

Grades:

8 - 12

OPTION 4A

School Name: SOUTHERN OKANAGAN SECONDARY

Facility Code:

Date:

OCTOBER 20, 2011

District: SD # 53 (Okanagan Similkameen)

School Capacity: • Nominal - 550 Total Elective Modules

Min 22 (22.6 shown)

• Operating -

Agreed Nominal / Operating Capacity:

Ministry of Education

Date

This sheet is for use in the design procedures in PART 2 of the Building Manual.

PART 1 - ACADEMIC / VOCATIONAL

Space Function	A1 - EXISTING			1B - MODULES			1C - NEW CORE			1D - NEW ELECTIVE		
	Description	Area	Mods	Core	Deficit	Surplus	Description	Area	Mods	Description	Area	Mods
Business Education	Bus. Ed/Digital Art	137	1.0	1.0	-	-						
Fine Arts	Art	137	1.0	1.0	-	-				Music	180	1.0
										Drama	150	1.0
Home Economics	Teaching Kitchen	57	0.3	0.3	0.7	-	Food/Textiles	160	1.0			
Industrial Education	Construction	351	1.0	1.0	-	2.7						
	Metal	241	1.0									
	Power Mechanics	281	1.0									
	Technology	91	0.7									
Science	Science	501	3.6	2.0	-	1.6						
Other *				-	-	-						
General Instruction	() rooms 75-95 m ²	0	0	E: 0	7.0	-	Area = No. of modules X 80 m ²	560	7.0	Area = No. of modules x 80 m ²	240	3.0
	() Other rooms	0	0									
Sub-totals		1796				4.3		720			570	5.0
		Ai				Bi		Ci			Di	Dii

* Note - May not be used except for spaces agreed in writing by the Ministry.

DESIGN AID SHEET FOR SECONDARY SCHOOLS - SHEET #2

(See Sheet #1 for base information)

SOSS OPTION 4A

October 20, 2011

PART 2 - SERVICE / ACTIVITY					PART 3 - TOTAL AREAS					
Space Function	E - Existing	F - Allowable	G - Deficit	H - New		N - Existing	P - New			
Administration / Health	0	240	240	290	Existing Acad./Voc.	Ai 1796				
Counselling	0	50	50	50						
Gen. Storage	0	90	90	90	Core A/V Additions		Ci 720			
Gym Activity	753	750	-	0	Elective A/V Additions		Di 570			
Gym Ancillary	191	150	-	0	Service Activity	Ei 2428	Hi 1619			
Media / Tech. Centre	0	320	320	320	Sub-Total	4224	2909			
Multi-purpose	274	240	-	0			Ni 4224			
Special Education	0	180	180	180	Total Gross Allowable Area (6500 m2) <div style="border: 2px solid black; padding: 2px; display: inline-block;">7133</div>					
Mechanical	418	3% of New	67	67	ENROLMENT: as of: 2015 Grade Structure: projected					
Design Space	792	28% of New	622	622	Kgn:	Gr. 1-7:	Gr. 8-12:	Type-1:	Type-2:	Port. CR's
* Other	-						525-550			
Sub-Total	Ei 2446	Fi		Hi 1619	* Other: <div style="border: 1px solid black; height: 20px; width: 100%;"></div>					

Comments:

DESIGN AID SHEET FOR SECONDARY SCHOOLS - SHEET #1

Grades:

8 - 12

OPTION 5A

School Name: SOUTHERN OKANAGAN SECONDARY

Facility Code:

Date:

OCTOBER 20, 2011

District: SD # 53 (Okanagan Similkameen)

School Capacity: • Nominal - 550 Total Elective Modules

Min 22 (22.6 shown)

• Operating -

Agreed Nominal / Operating Capacity:

Ministry of Education

Date

This sheet is for use in the design procedures in PART 2 of the Building Manual.

PART 1 - ACADEMIC / VOCATIONAL

Space Function	A1 - EXISTING			1B - MODULES			1C - NEW CORE			1D - NEW ELECTIVE		
	Description	Area	Mods	Core	Deficit	Surplus	Description	Area	Mods	Description	Area	Mods
Business Education	Bus. Ed/Digital Art	137	1.0	1.0	-	-						
Fine Arts	Art	137	1.0	1.0	-	-				Music	180	1.0
										Drama	150	1.0
Home Economics	Teaching Kitchen	57	0.3	0.3	0.7	-	Food/Textiles	160	1.0			
Industrial Education	Construction	351	1.0	1.0	-	2.7						
	Metal	241	1.0									
	Power Mechanics	281	1.0									
	Technology	91	0.7									
Science	Science	501	3.6	2.0	-	1.6						
Other *				-	-	-						
General Instruction	() rooms 75-95 m ²	0	0	E: 0	7.0	-	Area = No. of modules X 80 m ²	560	7.0	Area = No. of modules x 80 m ²	240	3.0
	() Other rooms	0	0									
Sub-totals		1796				4.3		720			570	5.0
		Ai				Bi		Ci			Di	Dii

* Note - May not be used except for spaces agreed in writing by the Ministry.

DESIGN AID SHEET FOR SECONDARY SCHOOLS - SHEET #2

(See Sheet #1 for base information)

SOSS OPTION 5A

October 20, 2011

PART 2 - SERVICE / ACTIVITY					PART 3 - TOTAL AREAS														
Space Function	E - Existing	F - Allowable	G - Deficit	H - New		N - Existing	P - New												
Administration / Health	0	240	240	290	Existing Acad./Voc.	Ai 1796													
Counselling	0	50	50	50															
Gen. Storage	0	90	90	90	Core A/V Additions		Ci 720												
Gym Activity	753	750	-	0	Elective A/V Additions		Di 570												
Gym Ancillary	191	150	-	0	Service Activity	Ei 2446	Hi 1619												
Media / Tech. Centre	0	320	320	320	Sub-Total	4224	2909												
Multi-purpose	274	240	-	0			Ni 4224												
Special Education	0	180	180	180	Total Gross Allowable Area (6500 m2)														
Mechanical	418	3% of New		67	<div style="border: 1px solid black; padding: 5px; display: inline-block;">7133</div>														
Design Space	792	28% of New		622	ENROLMENT: as of: 2015 Grade Structure: projected														
* Other	-				<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Kgn:</td> <td style="width: 15%;">Gr. 1-7:</td> <td style="width: 15%;">Gr. 8-12:</td> <td style="width: 15%;">Type-1:</td> <td style="width: 15%;">Type-2:</td> <td style="width: 20%;">Port. CR's</td> </tr> <tr> <td></td> <td></td> <td>525-550</td> <td></td> <td></td> <td></td> </tr> </table>			Kgn:	Gr. 1-7:	Gr. 8-12:	Type-1:	Type-2:	Port. CR's			525-550			
Kgn:	Gr. 1-7:	Gr. 8-12:	Type-1:	Type-2:	Port. CR's														
		525-550																	
Sub-Total	Ei 2446	Fi		Hi 1619	* Other: <div style="border: 1px solid black; height: 20px; width: 100%;"></div>														

Comments:

DESIGN AID SHEET FOR SECONDARY SCHOOLS - SHEET #1

Grades:

8 - 12

OPTION 5B

School Name: SOUTHERN OKANAGAN SECONDARY

Facility Code:

Date:

OCTOBER 20, 2011

District: SD # 53 (Okanagan Similkameen)

School Capacity: • Nominal - 550 Total Elective Modules

Min 22 (22.6 shown)

• Operating -

Agreed Nominal / Operating Capacity:

Ministry of Education

Date

This sheet is for use in the design procedures in PART 2 of the Building Manual.

PART 1 - ACADEMIC / VOCATIONAL

Space Function	A1 - EXISTING			1B - MODULES			1C - NEW CORE			1D - NEW ELECTIVE		
	Description	Area	Mods	Core	Deficit	Surplus	Description	Area	Mods	Description	Area	Mods
Business Education	Bus. Ed/Digital Art	137	1.0	1.0	-	-						
Fine Arts	Art	137	1.0	1.0	-	-				Music	180	1.0
										Drama	150	1.0
Home Economics	Teaching Kitchen	57	0.3	0.3	0.7	-	Food/Textiles	160	1.0			
Industrial Education	Construction	351	1.0	1.0	-	2.7						
	Metal	241	1.0									
	Power Mechanics	281	1.0									
	Technology	91	0.7									
Science	Science	501	3.6	2.0	-	1.6						
Other *				-	-	-						
General Instruction	() rooms 75-95 m²	0	0	E: 0	7.0	-	Area = No. of modules X 80 m²	560	7.0	Area = No. of modules x 80 m²	240	3.0
	() Other rooms	0	0									
Sub-totals		1796				4.3		720			570	5.0
		Ai				Bi		Ci			Di	Dii

* Note - May not be used except for spaces agreed in writing by the Ministry.

DESIGN AID SHEET FOR SECONDARY SCHOOLS - SHEET #2

(See Sheet #1 for base information)

SOSS OPTION 5B

October 20, 2011

PART 2 - SERVICE / ACTIVITY					PART 3 - TOTAL AREAS														
Space Function	E - Existing	F - Allowable	G - Deficit	H - New		N - Existing	P - New												
Administration / Health	0	240	240	290	Existing Acad./Voc.	Ai 1796													
Counselling	0	50	50	50															
Gen. Storage	0	90	90	90	Core A/V Additions		Ci 720												
Gym Activity	753	750	-	0	Elective A/V Additions		Di 570												
Gym Ancillary	191	150	-	0	Service Activity	Ei 2446	Hi 1619												
Media / Tech. Centre	0	320	320	320	Sub-Total	4224	2909												
Multi-purpose	274	240	-	0			Ni 4224												
Special Education	0	180	180	180	Total Gross Allowable Area (6500 m2)														
Mechanical	418	3% of New		67	<div> ENROLMENT: as of: 2015 Grade Structure: projected <table border="1"> <tr> <td>Kgn:</td> <td>Gr. 1-7:</td> <td>Gr. 8-12:</td> <td>Type-1:</td> <td>Type-2:</td> <td>Port. CR's</td> </tr> <tr> <td></td> <td></td> <td>525-550</td> <td></td> <td></td> <td></td> </tr> </table> </div>			Kgn:	Gr. 1-7:	Gr. 8-12:	Type-1:	Type-2:	Port. CR's			525-550			
Kgn:	Gr. 1-7:	Gr. 8-12:	Type-1:	Type-2:	Port. CR's														
		525-550																	
Design Space	792	28% of New		622															
* Other	-																		
Sub-Total	Ei 2446	Fi		Hi 1619	* Other:														

Comments:

Page 53 to/à Page 56

Withheld pursuant to/removed as

s.15



Treasury Board Submission

Request for Decision

Minister: Honourable George Abbott, Minister of Education
Ministry: Education
Date: 16/03/2012 Ministry Document #: 022/12

Title:	Southern Okanagan Secondary School Fire Loss (SD# 53)
---------------	--

s.12

Page 60 to/à Page 61

Withheld pursuant to/removed as

s.12

MINISTRY OF EDUCATION BRIEFING NOTE

PREPARED FOR: Honourable Margaret MacDiarmid, Minister, for **Information**, at the request of the Resource Management Division, to accompany a revised Capital Project Agreement.

SUBJECT: Revised Capital Project Agreement - Addition and Renovation at Southern Okanagan Secondary School - School District No. 53 (Okanagan Similkameen)

BACKGROUND:

- In March of 2009, the Okanagan Similkameen Board of Education signed a Project Agreement to deliver this project (Project No. 113849) with provincial capital funding of \$27,511,251 plus \$2,339,386 in reserve for a total potential cost of \$29,850,637.
- The capacity of the new facility will be 550 students Grade 8 to 12.
- The Project Agreement was amended in November of 2009 to reflect the following changes: de-escalation of construction cost estimate, incorporation of a Neighbourhood Learning Centre, and estimated HST cost pressure.

Neighborhood Learning Centre

- Southern Okanagan Secondary School was selected as a Neighbourhood Learning Centre in April of 2009.
- The intent of this program is to better integrate the delivery of education programs with the delivery of a broad range of social and community objectives.
- The school district consulted with both community and education partners to determine which programs should be offered on site.
- On September 17, 2009, the School District presented a Neighbourhood Learning Centre (NLC) proposal to the Ministry of Education. This proposal included a Daycare Centre, Community Counseling Centre, Community Performance Space and an Adult Learning Centre for an additional 845 square metres of space.
- The NLC space is to be incorporated into a school wing that was formerly scheduled for demolition.

Funding Revisions

- In November of 2009, the Okanagan Similkameen Board of Education revised this Project Agreement to account for the estimated impact of HST, de-escalation construction cost and additional space for the Neighbourhood Learning Centre.
- Market conditions have changed since the signing of the Project Agreement in March of 2009, and construction costs decreased to reflect this.
- Provincial capital funding for the project will increase from \$27,511,251 to \$29,258,431 (excluding reserves) due to the increased size and scope.
- Contingency reserve for this project decreased from \$2,339,386 to \$1,730,580 mainly as a result of cost de-escalation.
- Total maximum funding potential, including reserves, for this project has therefore increased from \$29,850,637 to \$30,989,011.

DISCUSSION:

- Southern Okanagan Secondary was identified as one of the first Neighbourhood Learning Centre models.
- The school district wishes to commence construction in the spring of 2010 and the replacement school is expected to open in September 2012.
- This project will adhere to the rules and regulations of the *Wood First Act*, 2009.

LINKS TO OTHER MINISTRIES: n/a

<u>Contact Information</u>		Approved by:
Resource Management Division 356-7814	ADM Initial	James Gorman Deputy Minister
		Date signed:

Cutler, Rosa EDUC:EX

From: Stewart, Doug I EDUC:EX
Sent: Monday, October 1, 2012 9:36 AM
To: Kukucha, Karen A EDUC:EX; Woycheshin, John J EDUC:EX
Cc: Silver, Matt EDUC:EX
Subject: RE: CHBC: School building construction over budget

Total funding approved for the rebuild (post-fire) is \$24m; includes \$20.8m new provincial funds (of which \$1.3m is a risk reserve).
Board is managing the project to stay within available funding; construction has been under way since the spring of 2012, with expected completion in time for Sept 2013.
The district, as indicated by the Board chair, has advised they will complete the project within budget.

Doug Stewart
Director, Capital Management
Resource Management Division
Phone 250-217-8656
Fax 250-953-4985
<mailto:doug.i.stewart@gov.bc.ca>

From: Kukucha, Karen A EDUC:EX
Sent: Monday, October 1, 2012 8:43 AM
To: Woycheshin, John J EDUC:EX; Stewart, Doug I EDUC:EX
Subject: FW: CHBC: School building construction over budget
Importance: High

OVER TO YOU.

From: Silver, Matt GCPE:EX
Sent: Monday, October 1, 2012 8:42 AM
To: Kukucha, Karen A EDUC:EX
Subject: CHBC: School building construction over budget

Karen, can we check in with Doug about this – what are the actual costs etc.

Thanks,

Matt

CHBC (Kelowna)
CHBC News at 5:00
28-Sep-2012 17:33

Copyright



APR 25 2012

Ref: 157848

Marieze Tarr, Chair
Board of Education
School District No. 53 (Okanagan Similkameen)
PO Box 1770
Oliver BC V0H 1T0
Fax: 250-498-4070

Marieze
Dear Ms. Tarr:

I am pleased to advise the Okanagan Similkameen Board of Education that funding has been approved for the rebuilding of Southern Okanagan Secondary School (Project No. 113849).

A letter from Ministry staff will follow, containing documentation to confirm the project scope and budget and confirming the requirements that will enable the Board to complete the school.

The Ministry looks forward to working with the Board towards the restoration of this very important community asset.

Yours truly,

George Abbott
Minister

pc: Beverly Young, Superintendent of Schools
Lynda Minnabarriet, Secretary-Treasurer



FAXED
2012/4/12

VIA FAX
Our Ref: 157829

April 12, 2012

Lynda Minnabarriet
Secretary-Treasurer
School District No. 53 (Okanagan Similkameen)
PO Box 1770
Oliver BC V0H 1T0
Fax: 250 498-4070

Dear Lynda Minnabarriet:

Re: Amended Certificate of Approval - South Okanagan Secondary School

Further to the recent letter from Honourable George Abbott, Minister of Education, I am pleased to confirm approval for the completion of South Okanagan Secondary School in Oliver. The revised budget (Schedule B) is attached.

The original Certificate of Approval (No. 618-113849 -02) in the amount of \$29,258,431 has been amended to include the original risk reserve amount of \$1,730,580 plus new funding to complete the project in the amount of \$19,449,725. The revised COA amount after the above noted adjustment is \$50,438,736.

Your new Certificate of Approval (# 618-113849-03) in the amount of \$50,438,736 is now enclosed. A new risk reserve has also been established in the amount of \$1,345,475.

I wish the School District every success with the rebuilding of South Okanagan Secondary School.

Yours sincerely,

Doug Stewart, Director
Capital Management Branch

pc: Phillip Chambers, Regional Manager, Capital Management Branch
Earl Strueby, Planning Officer, Capital Management Branch

Attachments

Ministry of
Education

Resource Management
Division

Mailing Address:
PO BOX 9151 STN PROV GOVT
Victoria BC V8W 9H1
Telephone: (250) 356-7814
Facsimile: (250) 953-4985

Location:
5th Floor
620 Superior St
Victoria BC



BRITISH
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The Best Place on Earth

CAPITAL PROJECT CERTIFICATE OF APPROVAL

Sponsoring Ministry: MINISTRY OF EDUCATION Division:

Government Body: SD# - 53 OKANAGAN SIMILKAMEEN

Certificate Number: 618-113849

Revision No.: 03

This Certificate is issued pursuant to the Treasury Board approval for the Capital Project described below (the "Project") and a Memorandum of Understanding (the "COA-MOU") between Provincial Treasury and the Sponsoring Ministry. This Certificate constitutes an approval by the Province for the Government Body to request Capital Funding (Advance) from the Province in accordance with the COA-MOU for the purpose of facilitating approved Project expenditures.

APPROVED CAPITAL PROJECT

Project No.: 113849

Project Location:

Facility Name: SOUTHERN OKANAGAN SECONDARY

Project Description: ADDITIONS/RENOVATIONS - 550 STUDENT GRADES 8-12

Total Estimated Project Costs: \$ 50,438,736.00

Treasury Board Approval Stage: 1. ___ Site 2. ___ Planning 3. X Completion

Funding Detail (this certificate cancels and replaces all previous certificates issued for the Project):

Previous Certificate No.: 618-113849

Previous Revision No.: 02

Previous Total Approved Advance: \$ 29,258,431.00

Increase (Decrease) Determined By This Certificate: \$ 21,180,305.00

Total Approved Advance: \$ 50,438,736.00

Expiry Date: MARCH 31, 2015

GOVERNMENT BODY ACCOUNT

s.15,s.21

Financial Institution:

Transit No.:

TERMS OF APPROVAL

1. The **Total Approved Advance** approved by this Certificate represents the maximum that may be advanced for the Project.
2. This Certificate is valid only until the **Expiry Date** or until cancelled by the Sponsoring Ministry. This Certificate is not transferable.
3. Additional terms specific to the Project made between the Sponsoring Ministry and the Government Body are set out below or in the attached Appendix.

TOTAL APPROVED BORROWING HAS BEEN REDUCED BY 0.00 FUNDED FROM
MINISTRY OF EDUCATION-RESTRICTED CAPITAL AND/OR LAND CAPITAL RESERVE.

SIGNATURE OF RESPONSIBLE MINISTER OR DESIGNATE

Phillip Chambers

EFFECTIVE DATE

APRIL 05, 2012

ORIGINAL: MINISTRY OF FINANCE

COPIES: 1) GOVERNMENT BODY

2) SPONSORING MINISTRY

School Name:		South Okanagan Secondary School		
Project No:		113849		
Project Description:		550 Student Grade 8 to 12 - POST FIRE DESTRUCTION - OPTION 5A		

Nominal Capacity	Kindergarten	Grades 1 - 7	Grades 8 - 12	Grade Configuration
Existing				
Approved				
Additional				

A R E A - U N I T R A T E	Allowable Site Area (ha)	
	Allowable Building Area (sqm)	
	Total Allowable Area	0
	Less: Previously Existing Space	0
	Add: Area to be Demolished	0
	Area of New Space	3,005
	Allowable Area of Renovations	0
	Unit Rate for Construction (\$/sqm) (based on 1 st Quarter 2011 Location Factor and using Ministry Unit Rates)	
	New (see calculation below)	\$2,489.65
	Renovation	

PROJECT BUDGET		REVISED PROJECT AGREEMENT	Amounts Subject to Economic Adjustment
1	Site Acquisition	\$0.00	\$0.00
2	Site Development	\$1,438,944.00	\$1,438,944.00
3	New Construction (3,005m ² allowable area x \$2,489.65/m ²) - see Unit Rate Calculation below	\$7,480,491.72	\$7,480,491.72
4	Renovation	\$0.00	\$0.00
5	Design Fees and Disbursements	\$1,223,113.49	\$1,223,113.49
6	Construction Contingency	\$445,971.79	\$445,971.79
7	Equipment	\$1,557,824.50	\$1,557,824.50
8	Municipal Permits & Fees	\$70,000.00	\$70,000.00
Documented Supplementary Items (including fees and related costs)			
9	Supplementary Site	\$737,178.75	\$737,178.75
10	Supplementary Building	\$2,574,520.41	\$2,574,520.41
11	Off-Site Costs	\$0.00	\$0.00
12	LEED® Gold (3%)	\$224,414.75	\$224,414.75
13	List of Other Budget Items:		
	i. Feasibility Costs - Revised PIR etc. after fire destruction	\$50,000.00	\$50,000.00
	ii. Temporary Accommodation - Increased operating costs	\$240,000.00	\$240,000.00
	iii. Neighbourhoods of Learning (810m ²)	\$1,976,619.15	\$1,976,619.15
	iv. Theatre (911m ²)	\$4,099,500.00	\$4,099,500.00
	v.	\$0.00	\$0.00
	vi.	\$0.00	\$0.00
14	Sub-Total	\$22,118,578.56	
15	HST	12.00%	\$2,654,229.43
16	HST Rebate - Federal Portion	28.33% (68% of five twelfths)	-\$752,031.67
17	HST Rebate - Provincial Portion	50.75% (87% of seven twelfths)	-\$1,347,021.43
(A)	Total Project Budget (excluding Reserve Items)	\$22,673,754.88	
(B)	Total Project Budget Eligible for Economic Adjustment		\$22,118,578.56
RESERVE ITEMS (as per Schedule C - Reserve Items)			
List of Identified Risks			
	1. Escalation Allowance	\$453,475.10	
	2. Change from HST to PST/GST	\$392,000.00	
	3. Unknowns	\$500,000.00	
	4	\$0.00	
	5	\$0.00	
	6	\$0.00	
(C)	Maximum "Not to Exceed" Contingency	Sub-Total	\$1,345,475.10
(D)	Estimated Economic Adjustment (from Location Factor 1 st Quarter 2011 to Mid-Point of Construction)		\$2,131,036.35
(E)	Total Reserve Items	\$1,345,475.10	[=C+D]
(F)	MAXIMUM POTENTIAL PROJECT COST (including Reserve Items)	\$24,019,229.98	[=A+E]
F U N D I N G S O U R C E S	(G) Capital Plan [as per Capital Project Funding Agreement, subparagraph 3.01(a)]	\$20,048,012.69	
	(H) Ministry of Education Restricted Capital [as per paragraph 3.04]	\$325,742.19	
	(I) Borrowing [as per paragraph 3.05]		
	(J) Local Capital Reserve [as per subparagraph 4.02(e)]		
	(K) Annual Facility Grant [as per subparagraph 4.02(e)]		
	Other (specify) [as per subparagraph 4.02(e)] - Contribution to Theatre from local community		
	(L) (\$3,800,000 less \$1,500,000 already contributed prior to the fire)	\$2,300,000.00	
	Sub-Total	\$22,673,754.88	[=A]
	(M) Capital Plan - Identified Risks [as per sub-paragraph 3.01(b)]	\$1,345,475.10	[=C]
	(N) Capital Plan - Estimated Economic Adjustment [as per subparagraph 3.01(d)]	\$0.00	[=D]
Sub-Total	\$1,345,475.10	[=E]	
(O) MAXIMUM POTENTIAL PROJECT FUNDING	\$24,019,229.98	[=F]	
(includes Lines G, H, I, J, K, L, M and N)			

Unit Rate for Construction as per Ministry Guidelines	
Base Unit Rate	1,065.00
Project size factor (see calc adjacent)	1.0600
Base Unit Rate x Project size factor	1,128.85
Air Conditioning	40.00
Subtotal	1,168.85
Location factor - 1st Quarter 2011	2.13
Unit rate (Subtotal x Location factor)	2,489.65

Project Size factor - Ministry Guidelines Secondary	
Lower area	3,000
Upper area	4,000
Actual Size	3,005
Difference	5
Calculated Size Factor	1.0600

CAPITAL PROJECT BYLAW 113849

A BYLAW by the Board of Education of School District No. 53 (Okanagan Similkameen) (hereinafter called the "Board") to adopt a Capital Project.

WHEREAS in accordance with provisions of the *School Act* the Minister of Education (hereinafter called the "Minister") has approved a capital plan of the Board.

NOW THEREFORE the Board agrees to the following:

- (a) upon approval to proceed, commence the Project and proceed diligently and use its best efforts to complete the project substantially in accordance with the Project Agreement (where required);
- (b) observe and comply with any rule, policy or regulation of the Minister as may be applicable to the Board or the Project; and,
- (c) maintain proper books of account, and other information and documents with respect to the affairs of the Project, as may be prescribed by the Minister.

NOW THEREFORE the Board enacts as follows:

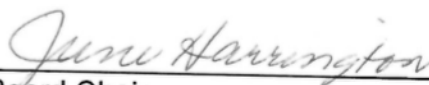
1. The capital project of the Board approved by the Minister and specifying a maximum expenditure of \$29,850,637 for Project No. 113849 is hereby adopted.
2. This Bylaw may be cited as "School District No. 53 (Okanagan Similkameen) Capital Project Bylaw No. 113849.


READ A FIRST TIME THE 8th day of April 2009.

READ A SECOND TIME THE 8th day of April 2009.


READ A THIRD TIME, PASSED AND ADOPTED THE 8th day of April 2009.

(Seal)


Board Chair


Secretary-Treasurer

I HEREBY CERTIFY this to be a true and original School District No. 53 (Okanagan Similkameen) Capital Project Bylaw No. 113849 adopted by the Board the 8th day of April 2009.


Secretary-Treasurer

APR 27 2009