

**HALTON DISTRICT  
SCHOOL BOARD  
CAPITAL STRATEGIC PLAN  
UPDATE**

DECEMBER 5, 2002

**P L A N N I N G   F O R   G R O W T H**



**C. N. WATSON  
AND ASSOCIATES LTD.**

---

**ECONOMISTS**

4304 Village Centre Court  
Mississauga, Ontario, Canada  
L4Z 1S2

Telephone: (905) 272-3600

Fax: (905) 272-3602

e-mail: [info@cnwatson.on.ca](mailto:info@cnwatson.on.ca)

---

## CONTENTS

	<u>Page</u>
<b>EXECUTIVE SUMMARY</b>	(i)
<b>1. INTRODUCTION</b>	1-1
<b>2. CAPITAL STRATEGIC PLAN (CSP) UPDATE</b>	
2.1 Background	2-1
2.2 Residential Unit Growth Forecast Update	2-3
2.3 Enrolment Forecast Update	2-7
2.4 Rationale for Changes in the Enrolment Forecast	2-12
2.5 Project Update	2-27
2.6 Financial Assumptions Update	2-32
2.7 Conclusion	2-34

### APPENDICES

- A FORECAST OF DWELLING UNITS AND ENROLMENT – BACKGROUND MATERIAL BY REVIEW AREA
  
- B CAPITAL EXPENDITURE FORECAST (2002-2019)

---

## **EXECUTIVE SUMMARY**

---

## EXECUTIVE SUMMARY

C.N. Watson and Associates Ltd. prepared a Capital Strategic Plan (CSP) for the Halton District School Board, finalized in May, 2000. The CSP outlined projected enrolment for the Board for a twenty year period and recommended an accommodation strategy of new school construction, additions to existing facilities, program and facility upgrades and consolidation of surplus space. The approach used in developing the CSP integrates pupil enrolment forecasts, with the identification of the capital expenditures required (expressed in terms of timing, location and cost), developed in the context of a financing strategy based on the Board's potential revenue sources.

A Capital Strategic Plan relies on enrolment forecasts to determine where to add space and where to consolidate space if necessary. The enrolment forecasts are based on key demographic variables, which change over time. For this reason, it is important that CSPs be monitored and updated at regular intervals. In December, 2001, the Halton District School Board retained C.N. Watson and Associates Ltd. to update the 2000 Capital Strategic Plan. The results are as follows:

- The residential unit forecast was updated based on input from the four Municipal Planning departments, the Region of Halton's Best Planning Estimates Forecast and other available forecasts.
- Overall, the forecast prepared for this report (known hereafter as the 2002 CSP Update) was lower than the 2000 CSP Forecast by 735 units over the twenty year forecast period (2001-2019). The most significant difference is found in Burlington where the 2002 Update is lower by 1,768 units.
- The enrolment projections were updated based on changes in the trends of demographic indicators since the preparation of the 1999 Education Development Charge (EDC) Study Projections, used in the 2000 CSP.
- The existing community projections were lower by approximately 2,700 students on the elementary panel and 1,400 students on the secondary panel. The more significant decline in the existing community enrolment when compared to that of the 2000 CSP is largely

---

---

(ii)

attributable to the recent decline in births, a decrease in HDSB's apportionment, and a change in the projection methodology dealing with feeder school alignments.

- For new development, some of the pupil generation factors (PGF's) were revised from those used in the 2000 CSP due to declining fertility rates, the decreasing number of births and evidence that couples in new homes were delaying family creation (compared with historical data).
- The HDSB's share of total enrolment in the Region has been decreasing on both the elementary and secondary panels recently. The Board has lost 3% on the elementary panel and 2% on the secondary panel in the past four years to the co-terminous Catholic Board. As well, during that same time, private school enrolment (elementary and secondary combined) in Halton Region has increased by more than 38%.
- According to the 2002 Update projections for the requirements of new development, HDSB can expect approximately 4,000 fewer elementary students and 806 fewer secondary students than was forecast in the 2000 CSP by 2019/20. The decrease in the new development projections is based on: a lower residential unit forecast, lower pupil generation factors in some cases, and a smaller share of students being captured by the Board (decrease in apportionment).
- The overall changes in the enrolment forecast between the 2000 CSP and the 2002 CSP Update are summarized below:

<b>Panel</b>	<b>Original (2000) CSP</b>	<b>2002 CSP Update</b>	<b>Difference</b>
Elementary	48,303	41,508	-6,795
Secondary	23,301	21,076	-2,225

- The aforementioned revisions to the enrolment forecast, resulted in changes to the recommendations that were made in the original 2000 CSP (see Table A), namely:
  - Nine elementary school projects have been excluded or deferred, resulting in overall Board capacity (proposed) to be reduced by (5,700) pupil places by 2019

---

(iii)

- The timing and sizing of some projects have been revised, resulting in the reduction of (450) pupil places of Board capacity on the elementary panel, for a total reduction in overall capacity (proposed) on the elementary panel of (6,150) pupil places by 2019
- Two school projects on the secondary panel have been excluded for a reduction in capacity of (1,600) pupil places. Capacity was increased by 300 pupil places due to revisions to timing and sizing of projects for an overall (net) decrease of (1,300) pupil places to the Board's capacity (proposed) on the secondary panel in 2019
- Three additional facility dispositions have been recommended on the elementary panel, which would result in the disposition of 1,099.5 pupil places. One school, which was recommended for disposition in the 2000 CSP is being recommended to remain open adding 253.5 spaces. Overall, the Board's capacity would be reduced by (846) pupil places through dispositions on the elementary panel as compared to the 2000 CSP
- One additional disposition was recommended on the secondary panel, which would result in a reduction of (997) pupil places to the Board's capacity on the secondary panel.

The presentation of the 2002 Capital Strategic Plan update has been based on the most current input data available. However, the actual rate of growth, the number of births, apportionment, etc., is impacted by a variety of economic and demographic factors. Therefore, frequent monitoring and updating of the plan is necessary to ensure that the recommendations are current.

---

# 1. INTRODUCTION

---

# 1. INTRODUCTION

In December 2001, the Halton District School Board retained C.N. Watson and Associates Ltd. to update the Board's Capital Strategic Plan (CSP), prepared by the firm in early 2000. The CSP report was originally published on February 9, 2000. After an extensive public participation process, the recommended plan was finalized by the consultant in May 2000.

Subsequently, Board staff took a report to the Board outlining a proposed course of action, based on the report. After a second public input process, the Board approved a plan (See Table 1-2), which involved:

- construction of 6 new elementary schools in new growth areas opening in the 2002 and 2003 school years, adding 3,750 pupil places of On-the-Ground (OTG) capacity;
- construction of a new secondary school opening in year 2004/05, adding 900 pupil places (OTG capacity) and a new secondary school opening in year 2007/08 adding 1200 pupil places;
- closure of ten elementary schools in older areas (due to excess capacity) during the period from 2001/02 to 2007/08, reducing the OTG and capital grant (NPPG) capacity by 3,314.5 pupil places in total;
- closure of two secondary schools in 2005/06, reducing the OTG and NPPG capacity by 1,800 pupil places in total.



**Table 1-2  
Halton District School Board Capital Expenditure Plan (2001-2007)**

**Elementary Panel**

<b>Year</b>	<b>Project Description</b>	<b>New Pupil Places</b>	<b>Pupil Places Disposed</b>
2001	Retrofit Aldershot HS & BCHS to accommodate Grades 7 & 8		
2001	Construct Post's Corners P.S.	650	
2001	JK Implementation Phase 1		
2002	JK Implementation Phase 2		
2002	Disposition of Fairfield PS		-257
2002	Construct Rose/Millcroft #1 as JK-8 facility	650	
2002	Construct West Oak Trails #1 as JK -8 facility	600	
2003	Demolish/Reconstruct Lakeshore PS (350 pp capacity)	100	
2003	Disposition of Champlain PS		-342.5
2003	Disposition of Mountain Gardens PS		-467.5
2003	Construct Millcroft #2 as JK-8 facility	650	
2003	Construct Orchard #1 as JK-8 facility	550	
2003	Construct Milton Urban Expansion #1 - Site M2 as JK-8 facility	650	
2003	Construct Georgetown South Site H1 as JK-8 facility	650	
2004	Disposition of WE Breckon PS		-450
2004	Construct West Oak Trails #2	550	
2004	Reconstruct Gladys Speers gym, library, specialty rooms		
2004	Construct Milton Urban Expansion #2 as JK-8 facility	650	
2004	Dispose of Martin Street PS		-278
2005	Construct Shell/Bronte Facility	550	
2005	Dispose of Pine Grove PS		-571.5
2005	Construct Iroquois Ridge North #1 as JK-8 facility	550	
2005	Dispose of Queen Elizabeth		-303
2005	Construct Milton Urban Expansion #3 as JK-8 facility	650	
2005	Dispose of PW Merry		-220
2006	Construct Orchard #2 as JK-8 facility	550	
2007	Dispose of Linbrook PS		-253.5
2007	Dispose of New Central PS		-171.5

**Secondary Panel**

<b>Year</b>	<b>Project Description</b>	<b>New Pupil Places</b>	<b>Pupil Places Disposed</b>
2004	Construct Glen Abbey HS	900	
2004	Renovate Lord Elgin as a Vocational/Arts facility		
2005	Dispose of General Brock HS		-1056
2005	Disposition of Queen Elizabeth HS		-744
2007	Construct Milton Urban Expansion #1	1200	

Source: Halton District School Board

---

## **2. CAPITAL STRATEGIC PLAN (CSP) UPDATE**

---

---

## 2. CAPITAL STRATEGIC PLAN (CSP) UPDATE

### 2.1 Background

The objective of the CSP update was to “refresh” the plan, addressing changes in key input data and other circumstances which have occurred during the more than two year period since the original analysis was undertaken. The purpose was not to redo the CSP exercise, but to update, and in some cases, enhance the substantial work in the original document.

Key issues identified in the work program included:

- Review of the residential growth forecast included in the Board’s Capital Strategic Plan, particularly in light of servicing and planning constraints (eg. Georgetown), which were not evident at the time of preparation of the original CSP
- Review of the existing and new community enrolment forecast in light of recent enrolment trends for HDSB, the co-terminous Boards and private schools incorporate feeder school alignments, and (for the existing community) evidence of a lower number of births in the most recent period
- Updating of the NPPG and the OTG Capacity for the Board’s facilities, taking into consideration the June 2000 Ministry numbers as well as recent closure decisions and construction of new facilities
- Review of the CSP’s proposed construction program in light of changes arising from the review of the above components
- Review of costing assumptions, in light of Board (and other) experience, as well as interest rates and terms

This CSP update report relies extensively on methodology and background information provided in the February 19, 2000 report (and the May 2000 final infrastructure plan). This information has not been included in this update document. The original report should be consulted for additional details on the approach and key background information.

The CSP update takes into consideration the Board school construction and closure approvals. However, some changes are recommended in both timing and projects. This section of the report explains the changes between the 2000 CSP and the 2002 CSP Update. The following

sections outline the major reasons for revising the unit forecast, the enrolment forecast and ultimately the accommodation strategy and capital expenditure forecast. Detailed sheets by review area for both the elementary and secondary panels of the updated enrolment projections can be found in Appendix A. The revised accommodation strategy and capital expenditure sheets also by review area for both the elementary and secondary panels can be found in Appendix B, and maps illustrating the Board's review areas are contained in Appendix C.

---

---

## **2.2 Residential Unit Growth Forecast Update**

The residential unit forecast contained in the CSP update has been updated and revised from the forecast found in the February 2000 CSP. The forecast is largely consistent with the Region of Halton's Best Planning Estimates (BPE) from May 2000. Other sources of information for the growth forecast came from secondary plans, recent building permit issuance and meetings and/or discussions with the four municipal planning departments (City of Burlington, Town of Oakville, Town of Milton and Town of Halton Hills). The residential unit growth forecast by municipality can be found as Table 2-1.

In total, 70,421 new units are projected for the Region of Halton over the 2001-2019 forecast period. Almost half of the new units are projected to be built in Oakville (31,024 or 44%). The Town of Milton is expected to capture 18,574 units (26%), with Burlington getting 13,523 units (19%). The remaining 7,300 units (11%) are to be constructed in Halton Hills.

Of the additional 70,421, units the majority (44,446 or 63%) will be low density, with 18% (12,294) medium density and 13,680 units or 20% high density. The unit allocation by density type varies by municipality with Halton Hills having 70% of its units as low density as compared to Burlington with less than 50% of its units low density. This is important to note because typically low density units produce a higher number of school aged children.

The overall growth forecast is allocated not only by municipality but also by school review areas. Allocation by review area was completed using units in the development approvals process, building permits by planning area and from input received by the various planning departments. The majority of the growth in Halton Region is occurring in currently undeveloped (greenfield) areas where the Board can expect the majority of new pupils and thus, new facility construction. The major growth review areas for the Board are: Orchard and Alton in Burlington (total of 5,765 units), Georgetown in Halton Hills (6,008 units), the Urban Expansion Area in Milton (17,891 units), West Oak Trails (9,662 units) and North of Highway 5 (15,008 units) in Oakville. These areas account for more than 77% of the projected growth.

---

---

The dwelling unit forecast contained in the February 2000 CSP had a total of 71,156 units projected from 2001-2019<sup>1</sup> compared with the 70,421 units in the CSP update for a difference of 735 units (See Table 2-2).

In Burlington, the 2000 CSP had a projection of 15,291 additional units compared with 13,523 units in the CSP update for a difference of 1,768 units. On advice from the Burlington Planning Department, the forecast was reduced due in large part to lower numbers of projected units in the Alton and Orchard planning areas. In Halton Hills, the 2000 CSP projected 6,845 units versus 7,300 units in the CSP update for a difference of 455 units. At the time this report was produced, there was still some uncertainty regarding possible servicing constraints in the Town of Halton Hills. Due to this uncertainty, CNWA followed the Halton Region's BPE forecast for the Town of Halton Hills. The situation in Halton Hills is currently under review and is subject to change, and the forecast may have to be reviewed and revised.

In Milton, the 2000 CSP had a total of 17,997 units compared with 18,574 units in the new plan for a difference of 577. The number of units in the first few years of the forecast has been slightly reduced in the new CSP using updated projections completed for the Sherwood Survey Secondary Plan. In Oakville, the 2000 CSP projections and the updated projections are virtually the same.

It should be noted that some key assumptions that were used in the updated forecast may change. The Region of Halton is planning to update the Best Planning Estimates in the fall/winter of 2002 when the 2001 Census is available. The Town of Oakville is awaiting an OMB hearing regarding future development on the lands north of Highway #5 and as mentioned above, the Town of Halton Hills has remaining servicing issues. Changes due to any of these issues may have a significant impact on the dwelling unit forecast. Table 2-2 provides a summary comparison of the 2019/20 residential unit forecasts used in the 2000 CSP and the 2002 CSP Update.

---

<sup>1</sup> Original forecast was from 2000-2019 so that year 2000 units were not included for comparison purposes.

**Table 2-1**  
**Halton District School Board**  
**Region of Halton Residential Growth Forecast**  
**20 Year Incremental Projection of Occupied Dwelling Units by Municipality**

Review Area	Year 1 2001	Year 2 2002	Year 3 2003	Year 4 2004	Year 5 2005	Year 6 2006	Year 7 2007	Year 8 2008	Year 9 2009	Year 10 2010	Year 11 2011	Year 12 2012	Year 13 2013	Year 14 2014	Year 15 2015	Year 16 2016	Year 17 2017	Year 18 2018	Year 19 2019	Total Units	By Type
<b>1 Burlington</b>																					
Low Density	704	571	571	570	560	525	372	372	372	372	372	187	187	187	187	187	119	118	118	6,651	49.18%
Medium Density	250	171	171	171	181	176	151	151	151	151	151	157	157	157	157	157	141	141	141	3,086	22.82%
High Density	250	238	238	238	255	251	227	227	227	227	227	163	163	163	148	148	132	132	132	3,786	28.00%
<b>Sub-total</b>	<b>1,204</b>	<b>981</b>	<b>981</b>	<b>980</b>	<b>996</b>	<b>952</b>	<b>750</b>	<b>750</b>	<b>750</b>	<b>750</b>	<b>750</b>	<b>507</b>	<b>507</b>	<b>507</b>	<b>492</b>	<b>492</b>	<b>392</b>	<b>391</b>	<b>391</b>	<b>13,523</b>	<b>100.00%</b>
<b>2 Halton Hills</b>																					
Low Density	343	321	299	276	276	276	281	280	257	257	257	254	252	248	248	247	246	246	246	5,110	70.00%
Medium Density	74	69	64	59	59	59	60	60	55	55	55	54	54	53	53	53	53	53	53	1,095	15.00%
High Density	74	69	64	59	59	59	60	60	55	55	55	54	54	53	53	53	53	53	53	1,095	15.00%
<b>Sub-total</b>	<b>491</b>	<b>459</b>	<b>427</b>	<b>394</b>	<b>394</b>	<b>394</b>	<b>401</b>	<b>400</b>	<b>367</b>	<b>367</b>	<b>367</b>	<b>362</b>	<b>360</b>	<b>354</b>	<b>354</b>	<b>353</b>	<b>352</b>	<b>352</b>	<b>352</b>	<b>7,300</b>	<b>100.00%</b>
<b>3 Milton</b>																					
Low Density	1,057	1,061	1,025	935	827	746	696	423	455	486	537	586	574	541	529	510	514	517	521	12,540	67.51%
Medium Density	143	212	205	187	165	150	139	106	114	121	134	147	144	135	132	128	129	129	130	2,750	14.80%
High Density	0	141	136	125	110	100	93	176	190	202	224	244	239	225	220	213	214	215	217	3,284	17.68%
<b>Sub-total</b>	<b>1,200</b>	<b>1,414</b>	<b>1,366</b>	<b>1,247</b>	<b>1,102</b>	<b>996</b>	<b>928</b>	<b>705</b>	<b>759</b>	<b>809</b>	<b>895</b>	<b>977</b>	<b>957</b>	<b>901</b>	<b>881</b>	<b>851</b>	<b>857</b>	<b>861</b>	<b>868</b>	<b>18,574</b>	<b>100.00%</b>
<b>4 Oakville</b>																					
Low Density	1,019	799	969	760	1,261	1,178	1,178	1,178	989	989	989	999	999	999	1,431	1,431	980	980	1,022	20,145	64.93%
Medium Density	234	250	153	231	379	379	379	379	235	235	235	240	240	240	352	352	278	278	298	5,366	17.30%
High Density	240	342	322	349	404	384	384	384	296	296	296	301	271	271	275	275	125	125	172	5,513	17.77%
<b>Sub-total</b>	<b>1,493</b>	<b>1,391</b>	<b>1,444</b>	<b>1,340</b>	<b>2,044</b>	<b>1,941</b>	<b>1,941</b>	<b>1,941</b>	<b>1,519</b>	<b>1,519</b>	<b>1,519</b>	<b>1,539</b>	<b>1,509</b>	<b>1,509</b>	<b>2,058</b>	<b>2,058</b>	<b>1,383</b>	<b>1,383</b>	<b>1,492</b>	<b>31,024</b>	<b>100.00%</b>
<b>5 Total Halton Region</b>																					
Low Density	3,124	2,752	2,864	2,541	2,923	2,724	2,527	2,253	2,072	2,103	2,154	2,026	2,012	1,975	2,395	2,375	1,859	1,861	1,907	44,446	63.11%
Medium Density	701	702	593	648	784	764	730	697	555	562	575	598	595	585	694	690	601	601	622	12,297	17.46%
High Density	564	791	760	771	828	794	764	847	768	780	802	762	727	712	696	689	524	525	574	13,678	19.42%
<b>Sub-total</b>	<b>4,388</b>	<b>4,245</b>	<b>4,218</b>	<b>3,961</b>	<b>4,536</b>	<b>4,283</b>	<b>4,020</b>	<b>3,796</b>	<b>3,395</b>	<b>3,445</b>	<b>3,531</b>	<b>3,385</b>	<b>3,333</b>	<b>3,271</b>	<b>3,785</b>	<b>3,754</b>	<b>2,984</b>	<b>2,987</b>	<b>3,103</b>	<b>70,421</b>	<b>100.00%</b>

**TABLE 2-2**  
**COMPARISON OF THE RESIDENTIAL UNIT FORECASTS**  
**2000 CSP AND THE 2002 CSP UPDATE**

Municipality	2000 CSP 2019/20	2002 CSP Update 2019/20	Difference
<b>Burlington</b>			
<i>Low</i>	9,283	6,651	(2,632)
<i>Medium</i>	2,183	3,086	903
<i>High</i>	3,825	3,786	(39)
<i>Total</i>	15,291	13,523	(1,768)
<b>Halton Hills</b>			
<i>Low</i>	4,779	5,110	331
<i>Medium</i>	1,028	1,095	67
<i>High</i>	1,039	1,095	56
<i>Total</i>	6,846	7,300	454
<b>Milton</b>			
<i>Low</i>	12,153	12,540	387
<i>Medium</i>	2,646	2,750	104
<i>High</i>	3,199	3,284	85
<i>Total</i>	17,998	18,574	576
<b>Oakville</b>			
<i>Low</i>	20,329	20,146	(183)
<i>Medium</i>	5,501	5,363	(138)
<i>High</i>	5,192	5,515	323
<i>Total</i>	31,022	31,024	2
<b>Total</b>			
<i>Low</i>	46,544	44,447	(2,097)
<i>Medium</i>	11,358	12,294	936
<i>High</i>	13,255	13,680	425
<i>Total</i>	71,157	70,421	(736)



---

---

## **2.3 Enrolment Forecast Update**

### **2.3.1 Overview**

The enrolment projections are comprised of two components: the existing community projections and the requirements of new development projections. The existing community projections are based on a “no growth” scenario addressing the change in enrolment in the existing (2002) community over time as if no additional dwelling units are constructed. The new development projections focus only on those pupils generated from the construction and subsequent occupation of new dwelling units (post 2002). The combination of these two projections accounts for the total pupil enrolment forecast for any particular review area. The projections are reflective of “Average Daily Enrolment” (ADE), which is the basis for the funding of “Grants For New Pupil Places”. A comprehensive outline of the pupil forecasting methodology can be found in Chapter 5 of the Board’s 1999 EDC Background Study.

As part of the 2002 CSP Update, updated enrolment projections were prepared. On the whole, these updated projections were lower (on both the elementary and secondary panels) than the figures calculated for use in the 2000 CSP document. The following sections outline the differences between the projections and the impact that certain demographic variables have on the projections. The assumptions used to predict future enrolment rely on demographic data available at the time, and recent changes in these trends have had a significant impact on the calculation of the new enrolment projections. Tables 2-3 and 2-4 illustrate the differences between the 2000 CSP projections and the 2002 CSP Update projections for the existing community and the requirements of new development for both the elementary and secondary panels.

### **2.3.2 Elementary Panel Enrolment**

On the elementary panel, the existing community projections for the 2002 CSP Update have a 2001/02 enrolment of 27,278 which decreases to 23,395 by 2019/20 for an overall decline of 3,883 or just over –14%. The 2000 CSP had a 2001/02 existing community projection of 25,228 and a 2019/20 number of 26,052 for an increase of 824 (3.3%).

**Table 2-3**  
**A Comparison of Enrolments From The 2000 Capital Strategic Plan and The 2002 Update**  
**Halton District School Board Elementary Panel, 2001/02 - 2019/20**

**Existing Community**

Municipality	2002 CNWA Existing Community Projections			2000 CNWA Existing Community Projections			Difference		
	2001/2002	2010/11	2019/20	2001/2002	2010/11	2019/20	2001/2002	2010/11	2019/20
Oakville	9,962	8,910	8,644	9,101	8,992	8,910	861	(82)	(266)
Halton Hills and Milton	6,534	6,000	5,720	6,094	6,240	6,246	440	(241)	(526)
Burlington	10,782	9,415	9,031	10,087	10,683	10,955	696	(1,267)	(1,924)
<b>Total</b>	<b>27,278</b>	<b>24,325</b>	<b>23,395</b>	<b>25,282</b>	<b>25,916</b>	<b>26,111</b>	<b>1,996</b>	<b>(1,590)</b>	<b>(2,716)</b>

**Requirements of New Development**

Municipality	2002 CNWA New Development Projections			2000 CNWA New Development Projections			Difference		
	2001/2002	2010/11	2019/20	2001/2002	2010/11	2019/20	2001/2002	2010/11	2019/20
Oakville		4,125	8,078	368	4,596	9,749		(471)	(1,671)
Halton Hills and Milton		4,079	6,814	488	5,193	8,110		(1,114)	(1,296)
Burlington		2,563	3,221	309	2,958	4,333		(395)	(1,112)
<b>Total</b>		<b>10,767</b>	<b>18,113</b>	<b>1,165</b>	<b>12,746</b>	<b>22,192</b>		<b>(1,979)</b>	<b>(4,079)</b>

**Total Anticipated Enrolment**

Municipality	2002 CNWA Total Anticipated Enrolment			2000 CNWA Total Anticipated Enrolment			Difference		
	2001/2002	2010/11	2019/20	2001/2002	2010/11	2019/20	2001/2002	2010/11	2019/20
Oakville	9,962	13,035	16,722	9,469	13,588	18,659	493	(553)	(1,937)
Halton Hills and Milton	6,534	10,079	12,534	6,582	11,433	14,356	(48)	(1,355)	(1,822)
Burlington	10,782	11,978	12,252	10,396	13,641	15,288	387	(1,662)	(3,036)
<b>Total</b>	<b>27,278</b>	<b>35,092</b>	<b>41,508</b>	<b>26,447</b>	<b>38,663</b>	<b>48,303</b>	<b>831</b>	<b>(3,570)</b>	<b>(6,795)</b>

Note: The 2000 CSP requirements of new development projections do not include the year 2000 projection.

**Table 2-4**  
**A Comparison of Enrolments From The 2000 Capital Strategic Plan and The 2002 Update**  
**Halton District School Board Secondary Panel, 2001/02 - 2019/20**

**Existing Community**

Municipality	2002 CNWA Existing Community Projections			2000 CNWA Existing Community Projections			Difference		
	2001/2002	2010/11	2019/20	2001/2002	2010/11	2019/20	2001/2002	2010/11	2019/20
Oakville	5,884	5,224	5,062	5,627	5,358	5,975	257	(134)	(913)
Halton Hills and Milton	3,562	2,997	2,845	3,490	3,199	3,028	72	(203)	(183)
Burlington	5,809	4,673	4,536	5,494	5,216	4,858	315	(543)	(322)
<b>Total</b>	<b>15,255</b>	<b>12,894</b>	<b>12,442</b>	<b>14,610</b>	<b>13,774</b>	<b>13,861</b>	<b>644</b>	<b>(880)</b>	<b>(1,419)</b>

**Requirements of New Development**

Municipality	2002 CNWA New Development Projections			2000 CNWA New Development Projections			Difference		
	2001/2002	2010/11	2019/20	2001/2002	2010/11	2019/20	2001/2002	2010/11	2019/20
Oakville		1,249	3,356	184	1,781	3,954		(532)	(598)
Halton Hills and Milton		1,655	3,704	161	1,749	3,683		(94)	21
Burlington		1,003	1,574	116	1,136	1,803		(133)	(229)
<b>Total</b>		<b>3,907</b>	<b>8,634</b>	<b>461</b>	<b>4,666</b>	<b>9,440</b>		<b>(759)</b>	<b>(806)</b>

**Total Anticipated Enrolment**

Municipality	2002 CNWA Total Anticipated Enrolment			2000 CNWA Total Anticipated Enrolment			Difference		
	2001/2002	2010/11	2019/20	2001/2002	2010/11	2019/20	2001/2002	2010/11	2019/20
Oakville	5,884	6,473	8,418	5,811	7,139	9,929	73	(666)	(1,511)
Halton Hills and Milton	3,562	4,652	6,549	3,651	4,948	6,711	(89)	(297)	(162)
Burlington	5,809	5,676	6,110	5,610	6,352	6,661	199	(676)	(551)
<b>Total</b>	<b>15,255</b>	<b>16,801</b>	<b>21,076</b>	<b>15,071</b>	<b>18,440</b>	<b>23,301</b>	<b>183</b>	<b>(1,639)</b>	<b>(2,225)</b>

Note: The 2002 CSP Update secondary panel existing enrolment shown here does not include ALP/SRLP students.  
The 2000 CSP requirements of new development projections do not include the year 2000 projection.

---

---

The 2002 CSP Update projection is lower by 2,657 pupils or approximately 10% at the end of the forecast period. By municipality, the greatest difference in the projections occurred in Oakville where the CSP Update was lower by -1,445 pupils (more than 54% of the overall difference), followed by Burlington (-687) and Halton Hills and Milton combined (-526).

With regard to the requirements of new development, the 2002 CSP update projected that the Board would receive 18,113 new pupils between 2001/02 and 2019/20, compared to 22,192 in the 2000 CSP for a difference of 4,079 pupils. By municipality, the greatest difference was in Oakville where the 2002 CSP Update has 8,078 new pupils by 2019/20 and the 2000 CSP had 9,749 new pupils. In Burlington and Halton Hills and Milton combined, the 2002 CSP Update forecast was approximately 1200 pupil places lower in each area than the 2000 CSP.

The overall enrolment projections for the Halton District School Board 2002 CSP Update forecast the overall enrolment on the elementary panel to increase from 27,278 in 2001/02 to 41,508 in 2019/20 for a total gain of 14,230 pupils or 52%. The 2000 CSP forecast the enrolment on the elementary panel increasing by 21,856 pupils (+80%) from 26,447 in 2001/02 to 48,303 in 2019/20. The total enrolment forecast on the elementary panel for the 2002 CSP Update is -6,795 pupil places less than the 2000 CSP.

### **2.3.3 Secondary Panel Enrolment**

The existing community enrolment projections for the secondary panel prepared for the 2002 CSP update, decrease from 15,617 in 2001/02 to 12,782 in 2019/20 for a total loss of -2,835 pupil places. The 2000 CSP secondary projections decrease from 14,610 in 2001/02 to 13,861 in 2019/20 for a total loss of -749 pupil places. The 2002 CSP Update secondary projections for the existing community are declining by approximately -18% compared with -5% in the 2000 CSP. The 2002 projections are -1,079 spaces lower than the 2000 projection.

The 2002 Update projections for pupils generated from new development would have the Board receiving 8,635 additional secondary students. Oakville is projected to accommodate 43% (3,704) of the new students, Halton Hills and Milton almost 39% (3,356) and Burlington approximately 18% (1,574). The 2000 CSP forecast 9,442 additional secondary students from new development by 2019/20. The 2002 Update new development forecast projected -807 spaces less than the 2000 CSP.

Total enrolment for the Halton District School Board is projected to increase by 5,800 students or 37% from 2001/02 to 2019/20 on the secondary panel in this 2002 CSP Update. The total projected enrolment of 21,417 students is approximately 8% lower than the 2019/20 enrolment of 23,303 projected in the 2000 CSP.

## 2.4 Rationale For Changes In The Enrolment Forecast

### 2.4.1 Summary

Sections 2.3.2 and 2.3.4 describe the changes in the Halton District School Board's enrolment forecast from the original CSP prepared in 2000 (and based on enrolment projections prepared in early 1999 for the EDC study), and the results of the current review used in the 2002 CSP update. The overall 20 year enrolment forecast on both panels has decreased as follows:

Panel	Original (2000) CSP	2002 CSP Update	Difference
Elementary	48,303	41,508	-6,795
Secondary	23,301	21,076	-2,225

The main reasons for the decrease in the projections are summarized below as follows:

1. The pre-school aged population in the Region of Halton, after increasing from 1991-1996 has declined in the most recent 1996-2001 period. A reduction in the number of pre-school aged children will eventually affect future enrolments.
2. The number of births in the Region of Halton and specifically in older areas of Oakville and Burlington has been declining. While the decline in overall births in the Region of Halton has been occurring steadily over the last decade, the decline in particular areas of the Board's jurisdiction has occurred only in the most recent two or three years.
3. The average age of initial home purchase appears to be declining (due to lower interest rates and other affordability factors), and a delay in having children or having fewer children in total (as witnessed by declining fertility rates) appears to be reducing the initial yields in developing areas.
4. The pupil yields for high density units developed as part of the 1999 EDC process were not borne out by recent experience and accordingly they were adjusted downward as part of the update process.

5. The Board did not offer Junior Kindergarten at the time the 2000 CSP was being prepared, but had planned to implement it. The projections included an estimate of the number of JK students the Board could expect. The Board has not been as successful in capturing this number of JK students.
6. Implementation of some provisions of the original plan have been delayed (e.g. timing of closures) and this may have contributed to the fact that the Board has not been as successful in capturing the share of enrolment as forecast in the 2000 CSP. As well, the co-terminous Board has continued to build new schools in growth areas during this time.
7. A reduction in the number of units projected in the residential unit forecast (735 less units projected in the 2002 update), accounts for a limited share of the enrolment forecast reduction.

The following subsections provide additional background data on the key demographic variables both in Halton and at the Provincial level, which impacted on the updated enrolment forecast for the HDSB.

#### **2.4.2 Historical School Aged Population**

The aging of the Echo generation (the children of the “Baby Boomers” born from 1980 to 1995) over the next decade, will result in a significant decrease in overall school board enrolment on a Provincial level. The cohort following the Echo generation is smaller than other school-aged cohorts that have preceded it. Therefore barring any significant increase in immigration or local fertility rates, smaller age cohorts will begin to enter the school system.

Table 2-5 illustrates the changes to the Region of Halton and the Province of Ontario’s population age structure between 1991, 1996 and 2001. The change in pre-school aged children illustrates what school boards can expect in the way of future enrolment. The Region of Halton has witnessed an overall decrease in 0-4 year olds in the 1996-2001 period (-3.7%), a major change from 1991-1996 where the Region had a 7.0% increase in 0-4 year olds. Oakville experienced an increase in 0-4 year olds from 1991-1996 of almost 10%; however in the most recent 1996-2001 period, pre-school aged children declined by -2.5%. Burlington and Halton Hills/Milton have also experienced declines in their pre-school aged population in the most recent period (-2.8% and -7.1% respectively) after experiencing increases from 1991-1996.

**TABLE 2-5**  
**Change in School Aged Population**  
**Region of Halton, By Municipality**  
**1991 - 2001**

**A. Pre-School Population (Ages: 0-4)**

Year	Oakville		Halton Hills		Milton		Burlington		Halton Region		Ontario	
	Actual	% +/-	Actual	% +/-	Actual	% +/-	Actual	% +/-	Actual	% +/-	Actual	% +/-
1991	8,530	-	2,660	-	2,215	-	8,710	-	19,900	-	707,595	-
1996	9,305	9.1%	3,255	22.4%	2,025	-8.6%	9,085	4.3%	21,645	8.8%	734,170	3.8%
2001	9,070	-2.5%	3,375	3.7%	1,530	-24.4%	8,830	-2.8%	21,275	-1.7%	671,250	-8.6%

**B. Elementary (Ages: 5-14)**

Year	Oakville		Halton Hills		Milton		Burlington		Halton Region		Ontario	
	Actual	% +/-	Actual	% +/-	Actual	% +/-	Actual	% +/-	Actual	% +/-	Actual	% +/-
1991	15,895	-	5,025	-	5,185	-	16,740	-	37,660	-	1,347,640	-
1996	19,315	21.5%	6,265	24.7%	5,760	11.1%	17,910	7.0%	43,490	15.5%	1,480,045	9.8%
2001	22,360	15.8%	7,615	21.5%	4,250	-26.2%	19,965	11.5%	49,940	14.8%	1,561,500	5.5%

**C. Secondary (Ages: 15-19)**

Year	Oakville		Halton Hills		Milton		Burlington		Halton Region		Ontario	
	Actual	% +/-	Actual	% +/-	Actual	% +/-	Actual	% +/-	Actual	% +/-	Actual	% +/-
1991	8,270	-	2,400	-	2,670	-	9,010	-	19,680	-	679,060	-
1996	8,345	0.9%	2,535	5.6%	2,575	-3.6%	8,495	-5.7%	19,375	-1.5%	698,005	2.8%
2001	9,915	18.8%	3,100	22.3%	2,540	-1.4%	9,370	10.3%	22,385	15.5%	769,420	10.2%

Source: Statistics Canada Census Data



---

---

Provincially, pre-school aged children increased from 1991 to 1996 by 3.8% and declined from 1996-2001 by -8.6%.

The elementary school age population (ages 5-14) living in the HDSB jurisdiction, increased by 12.6% between 1991 and 1996, and 12.3% between 1996 and 2001. The secondary school aged population (ages 15-19) in the HDSB jurisdiction decreased by -1.8% between 1991 and 1996 and increased by 13.6% between 1996 and 2001, reflecting the effects of the trends in the elementary school aged population. Provincially, secondary school age children have increased to a similar degree as experienced in HDSB's jurisdiction. The school-aged data indicates that the Region's elementary and secondary school aged populations have grown over the past decade. The recent decreases in the number of pre school aged population, however, indicate that the Board may expect lower numbers of new students from the existing community entering the system in the future, which over time, will impact on total Board enrolment.

### **2.4.3 Historical Births**

The number of births occurring in a Board's jurisdiction is an important lead indicator of future enrolment trends. Increasing or declining births in an area have a direct impact on the number of students Boards can expect in the short to medium term. Table 2-6 illustrates the number of births in HDSB's jurisdiction over the last ten years.

Assumptions about entry level (JK/SK) enrolments on the elementary panel rely heavily on birth trends in the Board's jurisdiction. An increase/decrease in the number of births usually will have a corresponding effect on the Board's entry level year enrolment, and thus on total enrolment on a "go forward" basis. If the rate of decline were increased or even maintained, each grade cohort would get smaller, thus reducing the overall board enrolment significantly over time.

**TABLE 2-6**  
**HDSB Jurisdiction**  
**Total Live Births, 1991 – 2000**

Year	Total	
	Births	% +/-
1991	4,504	-
1992	4,580	
1993	4,478	
1994	4,426	
1995	4,373	
1996	4,246	
1997	4,071	
1998	4,095	
1999	4,092	
2000	4,069	
<b>Avg.</b>	<b>4,293</b>	
<b>1991-2000</b>	<b>-435</b>	<b>-9.7%</b>

**Source:** Statistics Canada

Overall, the number of live births has been decreasing in the HDSB jurisdiction. Between 1991 and 2000, the total number of births per year decreased from 4,504 in 1990 to 4,069 in 2000, a decline of -435 births, or almost 10%.

Of more importance than the jurisdiction wide decrease in births, was the dramatic decline of births by specific residence areas (Table 2-7). Of the 17 HDSB elementary review areas that have existing schools, 11 experienced a decline in the number of live births over the most recent three year period (1998-2000). The decline ranged from -1.6% to -57.14%. Some of the areas which experienced declines in the most recent three year period had been stable or increasing in the three year period preceding (1995-1997).

In the 2000 CSP, data at that time had indicated that dwellings in some older areas in Oakville and Burlington may begin to experience a reoccupation with younger families and school aged children. The most recent birth data would indicate that this reoccupation has not taken place or at least not in the magnitude projected. In Review Area 4 (Lakeshore East) in Burlington, births in the area had increased by more than 20% from 1995-1998; however declined by more than -12% from 1998-2000. In Oakville, in review areas 14 and 15 (Old Oakville East and Glen Abbey), births declined by approximately -14% and -26% from 1998-2000.

**Live Births By Review Area, 1995-2000**  
**Halton District School Board**

								<b>95-97</b>	<b>98-00</b>	<b>95-00</b>
	<b>Review Area</b>	<b>1995</b>	<b>1996</b>	<b>1997</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>	<b>+/-</b>	<b>+/-</b>	<b>+/-</b>
<b>1</b>	<b>RA PE21-Parkway Belt (Hannahville, Rural Burlington)</b>	39	44	41	28	36	12	5%	-57%	<b>-69%</b>
<b>2</b>	<b>RA PE24-Rural Halton Hills</b>	157	155	128	144	110	82	-18%	-43%	<b>-48%</b>
<b>3</b>	<b>RA PE23-Rural Milton</b>	90	73	84	69	72	49	-7%	-29%	<b>-46%</b>
<b>4</b>	<b>RA PE15-Glen Abbey</b>	275	251	218	209	190	155	-21%	-26%	<b>-44%</b>
<b>5</b>	<b>RA PE02-Wellington</b>	308	278	243	249	214	208	-21%	-16%	<b>-32%</b>
<b>6</b>	<b>RA PE22-Existing Urban Area (Milton)</b>	274	257	253	220	217	186	-8%	-15%	<b>-32%</b>
<b>7</b>	<b>RA PE05-Parkway Belt, Nelson, Mountainview N, Headon</b>	291	285	273	227	249	220	-6%	-3%	<b>-24%</b>
<b>13</b>	<b>RA PE06-Mountainview South</b>	183	176	166	143	134	143	-9%	0%	<b>-22%</b>
<b>14</b>	<b>RA PE01-Parkway Belt, Aldershot</b>	236	229	217	188	208	185	-8%	-2%	<b>-22%</b>
<b>15</b>	<b>RA PE14-Old Oakville East</b>	243	243	243	235	180	202	0%	-14%	<b>-17%</b>
<b>16</b>	<b>RA PE26-Acton</b>	123	131	126	111	109	111	2%	0%	<b>-10%</b>
<b>21</b>	<b>RA PE25-Georgetown</b>	338	343	354	336	365	314	5%	-7%	<b>-7%</b>
<b>22</b>	<b>RA PE04-Lakeshore East</b>	199	207	230	240	198	210	16%	-13%	<b>6%</b>
<b>23</b>	<b>RA PE13-Old Oakville West</b>	487	471	435	508	515	536	-11%	6%	<b>10%</b>
<b>24</b>	<b>RA PE16-College Park, River Oaks, Uptown, Iroquois Ridge</b>	570	608	642	621	615	681	13%	10%	<b>19%</b>
<b>25</b>	<b>RA PE07-Palmer, Tansley</b>	94	99	97	112	117	115	3%	3%	<b>22%</b>
<b>26</b>	<b>RA PE03-Lakeshore West</b>	320	341	337	356	435	418	5%	17%	<b>31%</b>

Source: Data provided by the Halton District School Board.

---

---

#### **2.4.4 Fertility Rates/Occupancy Trends**

Recent data suggests that housing occupancy (and particularly pupil generation factors) have declined since peaking in the mid 1990's. The data suggests that the family creation process is being delayed as many families are postponing having children (see fertility rates Table 2-8). In the Region of Halton, from 1991 to 2000, the total fertility rate dropped from 1.72 live births per 1000 women of child bearing age to 1.51, a decline of more than -12%. In the last four years alone (1997-2000), the fertility rate has dropped almost 8%.

In general, fertility rates in the Region of Halton are higher than those experienced at the Provincial level (See Table 2-9). In the Region, however, it appears that fertility rates in the 25-34 year age group (commonly referred to as women in their "prime child bearing years") are declining more rapidly than those at the Provincial level.

Declining fertility rates like those being experienced in the Region of Halton indicate that births may continue to decline as women are having less children and that both new and existing dwelling units may typically produce fewer school aged children than they have in the past.

#### **2.4.5 Historical Board Enrolment/Apportionment**

Historical enrolment is another important factor in making assumptions about how a Board's future enrolment is likely to change. Examining historical enrolments, in conjunction with other demographic variables, can assist in identifying enrolment patterns or future trends. Table 2-10 outlines historical enrolment for the HDSB and one of its co-terminous Board, the Halton Catholic District School Board (HCDSB).

HDSB's enrolment<sup>1</sup> in the elementary panel increased between 1991 and 2000. During this period, enrolment peaked in 1995 at 28,117 pupils. From 1996 to 2001, enrolment varied between a low of 26,769 and a high of 27,588. HDSB's co-terminous board, the HCDSB experienced a steady, gradual increase in enrolment from 1991 to 2001. Overall, enrolment at HCDSB increased at an annual rate of between 2.4% and 6.7% between 1991 and 2001.

---

<sup>1</sup> Note that the enrolment figures in this section are headcounts whereas the enrolment forecast uses ADE.

**TABLE 2-8**  
**Historical Age Specific Fertility Rates**  
**Region of Halton**  
**1991 - 2000**

Year	Fertility Rate per 1,000 Females by Major Age Cohort							
	15-19	20-24	25-29	30-34	35-39	40-44	45-49	Total
1991	10.30	42.85	124.64	121.06	39.42	4.74	0.18	1.72
1992	11.26	42.78	128.99	116.59	43.41	4.42	0.26	1.74
1993	10.61	39.83	125.17	126.89	45.45	4.44	0.16	1.76
1994	12.18	40.08	127.19	121.88	42.63	5.34	0.39	1.75
1995	11.02	41.11	114.86	124.16	44.03	5.30	0.08	1.70
1996	8.44	32.65	107.83	124.15	47.85	6.57	0.15	1.64
1997	6.33	35.02	106.10	123.04	50.41	7.07	0.08	1.64
1998	6.65	29.67	100.11	119.01	52.14	8.23	0.00	1.58
1999	5.64	28.55	97.65	128.47	50.34	6.12	0.37	1.59
2000	5.72	26.52	94.74	121.31	45.60	6.82	0.43	1.51

Source: Office of the Registrar General live births 1986-2001; Statistics Canada Intercensal Population 1986-2001, Demography Division

**TABLE 2-9**  
**Historical Age Specific Fertility Rates**  
**Province of Ontario**  
**1991 - 2000**

Year	Fertility Rate per 1,000 Females by Major Age Cohort							Total
	15-19	20-24	25-29	30-34	35-39	40-44	45-49	
1991	22.10	65.70	115.80	90.50	32.80	4.50	0.20	1.66
1992	22.20	64.40	115.90	92.10	33.60	4.90	0.20	1.67
1993	22.30	62.80	110.70	92.50	34.50	5.20	0.20	1.64
1994	22.40	62.30	110.30	93.20	35.30	5.60	0.20	1.65
1995	22.50	61.10	106.70	94.70	37.10	5.90	0.20	1.64
1996	19.90	57.70	104.40	94.40	38.40	6.10	0.20	1.61
1997	17.10	53.70	98.80	91.50	38.10	6.30	0.20	1.53
1998	17.30	54.60	97.50	92.00	38.60	6.40	0.30	1.53
1999	16.72	50.78	92.63	93.98	41.94	7.14	0.37	1.52
2000	16.16	47.22	88.00	96.01	45.56	7.97	0.47	1.51

Source: Annual Demographic Statistics 1988-2000; Statistics Canada, Catalogue no. 91-213

**TABLE 2-10**  
**Historical Enrolment**  
**HDSB & HCDSB**  
**1991 - 2000**  
*(Head Count Enrolment)*

**Elementary Panel**

Year	Halton Public		Halton Catholic		Total	
	Actual	% +/-	Actual	% +/-	Actual	% +/-
1991	26,050	-	11,714	-	37,764	-
1992	26,201	0.6%	12,151	3.7%	38,352	1.6%
1993	26,355	0.6%	12,902	6.2%	39,257	2.4%
1994	26,692	1.3%	13,760	6.7%	40,452	3.0%
1995	28,117	5.3%	14,324	4.1%	42,441	4.9%
1996	27,318	-2.8%	14,929	4.2%	42,247	-0.5%
1997	27,525	0.8%	15,794	5.8%	43,319	2.5%
1998	27,484	-0.1%	16,174	2.4%	43,658	0.8%
1999	26,769	-2.6%	16,725	3.4%	43,494	-0.4%
2000	27,588	3.1%	17,396	4.0%	44,984	3.4%

**Secondary Panel**

Year	Halton Public		Halton Catholic		Total	
	Actual	% +/-	Actual	% +/-	Actual	% +/-
1991	17,460	-	4,612	-	22,072	-
1992	17,538	0.4%	4,882	5.9%	22,420	1.6%
1993	16,944	-3.4%	5,150	5.5%	22,094	-1.5%
1994	16,855	-0.5%	5,434	5.5%	22,289	0.9%
1995	16,796	-0.4%	5,834	7.4%	22,630	1.5%
1996	15,484	-7.8%	5,882	0.8%	21,366	-5.6%
1997	15,618	0.9%	6,199	5.4%	21,817	2.1%
1998	15,731	0.7%	6,462	4.2%	22,193	1.7%
1999	15,924	1.2%	6,874	6.4%	22,798	2.7%
2000	16,238	2.0%	6,906	0.5%	23,144	1.5%

Source: Ministry of Education, Enrolment Website

---

---

Between 1991 and 2001, HDSB's enrolment on the secondary panel decreased from 17,460 in 1991 to 16,238 in 2000 (a decline of 7%). However, in the later half of this period, 1996 to 2000, enrolment has been increasing from 15,484 in 1996 to 16,238 in 2000. HCDSB's enrolment on the secondary panel has steadily increased at annual rates of between 0.8% and 7.4% over the same time period.

The term apportionment refers to the distribution of the school-aged population across the different providers of education in a given jurisdictional area. The Ministry of Education refers to this as the participation rate.

In general, education in a given jurisdiction is provided by four Provincially funded District School Boards, namely: Public, Catholic, French Public and French Catholic. The share of attendance within each of these four boards varies across the Province, with differences being attributable to factors such as ethnicity, religion and culture. Other education providers, not funded by the Province, account for the remainder of the enrolment, and include private and home schooling.

Board apportionment can have a significant impact on a Board's enrolment. A modest shift in apportionment between Boards, can increase/decrease enrolment substantially.

Table 2-11 sets out the board apportionment between the HDSB and the HCDSB for the years 1997-2000. In that four year period, HDSB has lost approximately 1% in share per year to the HCDSB. In 1997, the HDSB was capturing 64% of the students between the two boards and in 2000, this share had fallen to 61%. On the secondary panel, the HDSB has also lost almost 1% per year to the Catholic Board. HDSB had been capturing about 72% of the secondary enrolment between the Public and Catholic Boards in 1997 and this share dropped to 70% in 1999 and remained there in 2000.



**Table 2-11**  
**Historical School Board Enrolment Apportionment**  
**1997 - 2000**

**Elementary**

	<b>1997</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>
HDSB	27,525	27,484	26,769	27,588
<i>Apport. %</i>	64%	63%	62%	61%
HCDSB	15,794	16,174	16,725	17,396
<i>Apport. %</i>	36%	37%	38%	39%
<b>Total</b>	<b>43,319</b>	<b>43,658</b>	<b>43,494</b>	<b>44,984</b>

**Secondary**

	<b>1997</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>
HDSB	15,618	15,731	15,924	16,238
<i>Apport. %</i>	72%	71%	70%	70%
HCDSB	6,199	6,462	6,874	6,906
<i>Apport. %</i>	28%	29%	30%	30%
<b>Total</b>	<b>21,817</b>	<b>22,193</b>	<b>22,798</b>	<b>23,144</b>

Source: Ministry of Education

### 2.4.6 Private School Enrolment

Another important factor in decreasing apportionment for the HDSB is the increase in private school enrolment in the Region of Halton. Combined elementary and secondary enrolment in private schools has increased by more than 38% from 1997-2000 (Table 2-12). Although some private school attendees would not be Halton residents, the majority would be. The increase in private school enrolment further decreases the share of the school aged children in the Region which the HDSB is able to capture.

The majority of the students in private schools in the Region of Halton are attending schools in Oakville and Burlington. Of the total elementary and secondary private school enrolment, 4,063 students or more than 72% are in Oakville and 1,205 students or 21% are in Burlington.

**Table 2-12**  
**Enrolment In Private Schools**  
**The Region Of Halton, 1997-2000**

School	1997	1998	1999	2000	1997-2000
<b>Elementary and Secondary Combined</b>	4,081	4,269	5,041	5,638	<b>1,557</b>
<b>% +/-</b>	-	4%	15%	11%	<b>38%</b>

Source: Ministry of Education

---

---

## **2.5 Project Update**

The revised 2001-2019 enrolment forecast prepared for the 2002 CSP Update has resulted in changes to the recommendations to the original accommodation strategy contained in the 2000 CSP. Table 2-13 outlines the timing and location of the original projects from the 2000 CSP and the 2002 CSP Update recommended changes. The table is divided into three sections, which deal with: New School Construction, Disposition of Space and Retrofits to Existing Facilities.

### **2.5.1 *New School Construction***

The updated enrolment projections resulted in the recommendation to eliminate or delay nine new school projects from the 2000 CSP plan. Elementary schools in Alton, Clearview, Northwest Oakville (3), Milton Urban Expansion area (3), and Georgetown South are not expected to be required within the forecast period, due to the lower enrolment projection. The exclusion of these projects will reduce overall 2019 Board capacity (proposed) by -5,700 pupil places.

In addition to the project eliminations and deferrals, revisions were also made to the timing and size of some projects. Planned capacity at some schools was either reduced or increased accordingly. Thus, capacity on the elementary panel was reduced by a further 450 spaces. In total, the new recommendations would reduce planned capacity in 2019 by 6,150 spaces as compared to the 2000 CSP.

On the secondary panel, two schools were eliminated or deferred; one in West Oak Trails and one in Northwest Oakville for a reduction of 1,600 spaces. Capacity was increased, however, by 252 spaces through revisions to another project's construction size. Overall capacity on the secondary panel was reduced by 1,348 spaces as compared to the 2000 CSP.

**TABLE 2-13**  
**Halton District School Board**  
**Current 2000 Capital Strategic Plan vs. Recommended Changes in 2002 Capital Strategic Plan Update**  
**(2001-2019)**

**New School Construction**

	<b>2000 CSP Projects</b>	<b>Recommended Changes</b>	<b>Review Area</b>
1.	Millcroft #1 (650 p.p) in 2002/03	Opening in 2002/03	PE08A/09
2.	Millcroft #2 (650 p.p) in 2003/04	Reduce capacity to 550 and delay to 2004/05	PE08A/09
3.	Orchard #1 (550 p.p) in 2003/04	Capacity reduced to 500	PE08B/10
4.	Orchard #2 (550 p.p) in 2006/07	Capacity reduced to 500	PE08B/10
5.	Alton #1 (650 p.p) in 2009/10	Reduce capacity to 550 with possibility of phasing in additional capacity and delay to 2015/16	PE11
6.	Alton #2 (650 p.p) in 2014/15	Eliminate project	PE11
7.	Bronte school (550 p.p) in 2005/06	Reduce capacity to 450 and delay to 2008/09	PE12
8.	Iroquois Ridge North #1 (550 p.p) in 2005/06	No change	PE16
9.	Clearview (500 p.p) in 2006/07	Eliminate project (increase in private school programs in area)	PE17
10.	West Oak Trails #1 (600 p.p) in 2002/03	Opening 2002/03	PE18
11.	West Oak Trails #2 (550 p.p) in 2004/05	Capacity increased to 650	PE18
12.	West Oak Trails #3 (500 p.p) in 2008/09	Capacity increased to 650	PE18
13.	West Oak Trails #4 (550 p.p) in 2015/16	Capacity increased to 650 and moved up to 2013/14	PE18
14.	North West Oakville #1 (650 p.p) in 2009/10	Reduce capacity to 550 and move up to 2007/08	PE19
15.	North West Oakville #2 (650 p.p) in 2010/11	Reduce capacity to 550	PE19
16.	North West Oakville #3 (650 p.p) in 2011/12	Reduce capacity to 600 and delay to 2013/14	PE19
17.	North West Oakville #4 (650 p.p) in 2013/14	Reduce capacity to 550 and delay to 2016/17	PE19
18.	North West Oakville #5 (550 p.p) in 2014/15	Delay to 2017/18	PE19
19.	North West Oakville #6 (550 p.p) in 2015/16	Increase capacity to 600 and delay to 2018/19	PE19
20.	North West Oakville #7 (650 p.p) in 2016/17	Eliminate or defer project beyond forecast period	PE19
21.	North West Oakville #8 (650 p.p) in 2018/19	Eliminate or defer project beyond forecast period	PE19
22.	North West Oakville #9 (650 p.p) in 2020/21	Eliminate or defer project beyond forecast period	PE19
23.	Milton Urban Expansion #1 (650 p.p) in 2003/04	No change	PE20
24.	Milton Urban Expansion #1 (650 p.p) in 2004/05	Delay to 2005/06	PE20
25.	Milton Urban Expansion #3 (650 p.p) in 2005/06	Delay to 2007/08	PE20
26.	Milton Urban Expansion #4 (650 p.p) in 2006/07	Delay to 2012/13	PE20
27.	Milton Urban Expansion #5 (650 p.p) in 2007/08	Delay to 2014/15	PE20
28.	Milton Urban Expansion #6 (650 p.p) in 2011/12	Eliminate or defer project beyond forecast period	PE20
29.	Milton Urban Expansion #7 (650 p.p) in 2014/15	Eliminate or defer project beyond forecast period	PE20
30.	Milton Urban Expansion #8 (650 p.p) in 2016/17	Eliminate or defer project beyond forecast period	PE20
31.	Georgetown South #1 (650 p.p) in 2003/04	Reduce capacity to 600	PE25
32.	Georgetown South #2 (550 p.p) in 2007/08	Capacity reduced to 500 and delay to 2008/09	PE25
33.	Georgetown South #3 (550 p.p) in 2011/12	Capacity reduced to 500 and delay to 2017/18	PE25
34.	Georgetown South #4 (650 p.p) in 2014/15	Eliminate or defer project beyond forecast period	PE25
35.	Orchard Secondary #1 (1200 p.p) in 2008/09	Capacity reduced to 900 and delayed to 2011/12	PS04
36.	Glen Abbey Secondary (900 p.p) in 2005/06	Move up to 2004/05	PS07
37.	West Oak Trails Secondary #1 (1200 p.p) in 2008/09	Delay to 2013/14	PS10
38.	West Oak Trails Secondary #2 (800 p.p) in 2011/12	Construct 12 classroom addition to West Oak Trails #1	PS10
39.	North West Oakville #1 (800 p.p) in 2015/16	Eliminate or defer project beyond forecast period	PS10
40.	Milton Urban Expansion Secondary #1 (1200 p.p) in 2007/08	Delay to 2008/09	PS13
41.	Milton Urban Expansion Secondary #2 (1200 p.p) in 2011/12	Delay to 2013/14	PS13
42.	Georgetown South Secondary (800 p.p) in 2008/09	Delay to 2016/17	PS15

**TABLE 2-13**  
**Halton District School Board**  
**Current 2000 Capital Strategic Plan vs. Recommended Changes in 2002 Capital Strategic Plan Update**  
**(2001-2019)**

**Dispositions**

	2000 CSP Projects	Recommended Changes	Review Area
1.	Disposition of Fairfield (-257 p.p) in 2001/02	Fairfield closed	PE01
2.	-	Disposition of Burlington Central Elementary in 2011/12 (-275 p.p)	PE02
3.	Disposition/replacement of Central PS (-409 p.p) in 2002/03	No replacement of Central PS	PE02
4.	-	Disposition of W.E. Breckon (-450 p.p) in 2003/04	PE03
5.	Disposition of Pauline Johnson (-225 p.p) in 2001/02	Disposition of Ryerson in 2004/05 (-571.5 p.p)	PE03
6.	Disposition of Champlain (-342.5 p.p) in 2001/02	No change	PE05
7.	Disposition of Mountain Gardens (-467.5 p.p) in 2001/02	No change	PE06
8.	Disposition of Pine Grove (-571.5 p.p) in 2004/05	No change	PE13
9.	Disposition of Queen Elizabeth (-303 p.p) in 2006/07	Moved up to 2002/03 (NPPG Capacity does not come off until 2004/05)	PE13
10.	-	Disposition of Oakwood in 2005/06 (-253 p.p)	PE13
11.	Disposition of New Central (-171.5 p.p) in 2006/07	No change	PE14
12.	Disposition of Linbrook (-253.5 p.p) in 2006/07	Linbrook to remain open (Due to elimination of Clearview school)	PE14
13.	Disposition of Lorne Skuce (-372 p.p) in 2005/06	No change	PE16
14.	Disposition of Martin St. Jr. (-278 p.p) in 2001/02	Disposition in 2002/03	PE22
15.	Disposition of P.W. Merry (-220 p.p) in 2004/05	Moved up to 2003/04	PE23
16.	Disposition of General Brock (-1056 p.p) in 2001/02	Disposition in 2004/05	PS02
17.	Convert portion of BCHS to adult learning and JK-8 facility (-650 p.p)	Disposition of Burlington Central Secondary in 2011/12 (-997 p.p)	PS02
18.	Disposition of Q.E. Park (-744 p.p) in 2005/06	Moved up to 2004/05	PS05
19.	Disposition of E.C. Drury in 2013/14	Moved up to 2008/09	PS12

**Retrofits**

	2000 CSP Projects	Recommended Changes	Review Area
1.	JK to be added to particular elementary schools.	Board has implemented JK on the elementary panel across the jurisdiction in a 2yr. Phase	ALL
2.	Maplehurst to be retrofitted as a JK-6 Facility	Board has implemented project	PE01
3.	Retrofit Aldershot as 7-OAC Facility	Board has implemented project	PS01
4.	Retrofit Lord Elgin as a vocational/arts facility	No change	PS02
5.	Retrofit BCHS as a 7-OAC Facility	Board has implemented project	PS02

N.B: Post distribution of the 2000 CSP Report the Board has subsequently made alternate decisions regarding certain capital projects;

1. Queen Elizabeth PS disposition moved up to 2004/05.
2. General Brock HS disposition delayed to 2004/05.

---

### **2.5.2 Dispositions**

The revised enrolment forecasts also resulted in new recommendations being made with regard to dispositions of facilities. Two additional elementary schools have been recommended for closure: Ryerson PS and Oakwood PS. Linbrook PS, which was recommended for disposition in the 2000 CSP, is now recommended to remain open, adding 253.5 spaces. Linbrook PS was originally recommended for disposition because a new elementary school was to be constructed in the Clearview area, which would have accommodated a portion of the enrolment at Linbrook. Lower projected enrolment in the Clearview area results in a recommendation to eliminate the new school and retain Linbrook to accommodate the existing students. The overall reduction in capacity from additional dispositions would be 846 pupil places on the elementary panel. Also, the timing of some of the 2000 CSP recommended dispositions was accelerated.

On the secondary panel, Burlington Central Secondary was recommended for disposition in 2011/12 and the timing of the disposition at E.C. Drury was accelerated.

### **2.5.3 Retrofits**

Retrofits to existing facilities include projects such as renovations at existing secondary schools to accommodate Grade 7's and 8's or the introduction of Junior Kindergarten in the Board's elementary schools. The HDSB has either implemented or is in the process of implementing all the recommendations made in the 2000 CSP with regard to retrofits at existing facilities.

---

---

## **2.6 Financial Assumptions Update**

The Capital Strategic Plan Accommodation Strategy includes assumptions regarding Board costs for each project. The costs are based on a combination of Ministry benchmarks and Board experience, and are usually on a per pupil place or a per classroom basis. The costing assumptions used in both the 2000 CSP and the 2002 CSP Update are set out in Table 2-14. The 2002 CSP Update Accommodation Strategy reviewed and updated the expenditures associated with the capital projects: however, the cashflow analysis (including expenditures, revenues, financing strategies etc.) was completed by the Finance Department of the Halton District School Board, and is provided under separate cover.

In the 2000 CSP, the Ministry benchmark of \$11,700 (elementary) and \$16,380 (secondary) per pupil place was used for the construction of new pupil places in a new school. In recent school construction, the Board has been spending in the range of 7%-20% above the Ministry benchmark. The 2002 CSP Update has taken this into consideration, adjusting the financial assumption for new school construction to 10% above the benchmark for the first four years of the plan, 5% above the benchmark for years 5 and 6, and at par with the Ministry benchmark for the remainder of the forecast period. Therefore, for years 1 to 4, the elementary new pupil place cost is \$12,870 per pupil place and the secondary cost is \$18,018 per pupil place. The elementary new pupil place construction cost for years 5 and 6 is \$12,285 per pupil place and \$17,199 per pupil place on the secondary panel.

The cost associated with buying new portables have also been revised in the 2002 CSP Update. The Board has upgraded its entire inventory of portables in the past few years, thereby making it unnecessary to purchase new portables unless future portable needs are greater than the current inventory. The 2002 CSP Update Accommodation Strategy does not require the acquisition of any new portables. A \$15,000 moving cost is assigned to any portables that are moved. A \$15,000 cost is also assigned to portables that are disposed of, whereas the 2000 CSP had assigned no cost to disposed portables.

The remainder of the financial costs remained the same from the 2000 CSP to the 2002 CSP Update.

**Table 2-14**  
**Comparison Of Costing Assumptions**  
**2000 CSP And The 2002 CSP Update**  
**Halton District School Board**

2000 CSP		2002 CSP Update	
Type	Cost	Type	Cost
New School Construction Years 1-4 (Elementary)	\$11,700 per pupil place	New School Construction Years 1-4 (Elementary)	\$12,870 per pupil place
New School Construction Years 5-6 (Elementary)	\$11,700 per pupil place	New School Construction Years 5-6 (Elementary)	\$12,285 per pupil place
New School Construction Years 6-20 (Elementary)	\$11,700 per pupil place	New School Construction Years 6-20 (Elementary)	\$11,700 per pupil place
New School Construction Years 1-4 (Secondary)	\$16,380 per pupil place	New School Construction Years 1-4 (Secondary)	\$18,018 per pupil place
New School Construction Years 5-6 (Secondary)	\$16,380 per pupil place	New School Construction Years 5-6 (Secondary)	\$17,199 per pupil place
New School Construction Years 6-20 (Secondary)	\$16,380 per pupil place	New School Construction Years 6-20 (Secondary)	\$16,380 per pupil place
Additions To Existing Facilities	\$11,700 per pupil place	Additions To Existing Facilities	\$11,700 per pupil place
Acquisition of New Portable	\$60,000 per classroom	Move Portable	\$15,000 per classroom
Dispose of Portable	Included in Cashflow Analysis	Dispose of Portable	\$15,000 per classroom
New Portapak	\$80,000 per classroom	New Portapak	\$80,000 per classroom



---

## 2.7 Conclusion

The 2002 Capital Strategic Plan Update has resulted in revisions being made to the growth forecast, the enrolment projections and ultimately the accommodation strategy itself. The revisions were necessary due to recent changes in the trends of key demographic variables which have been outlined in this document.

**The preparation of the Board's Capital Strategic Plan is based on the most current short and long term information available at the time of the preparation of the report. However, the actual rate of growth, the number of births, apportionment etc. is impacted by factors such as the economic cycle, demographic shifts and migration rates. Accordingly, enrolment forecasts, the construction, timing and sizing for new school facilities will be affected, if trends and assumptions vary from those that form the basis for this plan. Monitoring and updating is recommended to consider these changes and adjust the plan as necessary.**