



Ministry of Education Effectiveness & Efficiency Review

Renfrew County Joint Transportation Consortium

E&E Phase 3 Review

October 2009

Final Report

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The English version is the official version of this report. In the situation where there are differences between the English and French versions of this report, the English version prevails.

À noter que la version anglaise est la version officielle du présent rapport. En cas de divergences entre les versions anglaise et française du rapport, la version anglaise l'emporte.

Executive Summary

This report details the findings and recommendations of an Effectiveness and Efficiency Review (“E&E Review”) of the Renfrew County Joint Transportation Consortium (“RCJTC” or the “Consortium”) conducted by a review team selected by the Ministry of Education (hereafter the “Ministry”). The E&E Review evaluates four areas of performance – Consortium Management, Policies and Practices, Routing and Technology use and Contracting practices – to determine if current practices are reasonable and appropriate; to identify whether any best practices have been implemented; and to provide recommendations on areas of improvement. The evaluation of each area is then used to determine an overall rating for the Consortium that will be used by the Ministry to determine any in-year funding adjustments that may be provided.

The Consortium's current structure is best described as indeterminate since there is no agreement between the member boards indicating that the Consortium is either a partnership or a separate legal entity. A number of significant modifications are required to the Consortium's governance and organizational structures. In addition, the E&E Review Team also noted that alterations must be made to a number of the Consortium's management and financial practices in order to improve both its effectiveness and efficiency. The most critical recommendation arising from the assessment of Consortium Management is a review of the decision making authority delegated to the Consortium as well as the delineation between the Consortium's operational responsibilities and the oversight responsibilities of the Consortium's governance structures. This should be completed alongside the attainment of separate legal entity status. Other recommendations relating to improvements to the Consortium's human resource planning, reporting and financial practices should also be implemented in order to institutionalize effective management practices within the Consortium.

Significant gaps exist in the Consortium's Policies and Practices. While the RCJTC operates under the umbrella of a fully harmonized Joint Transportation Policy, there are significant gaps in the documentation and uncertainty remains as to the application of certain guidelines. Of particular note is the absence of an appropriate policy and supporting procedure for the delivery of special needs transportation services.

Recent efforts to develop a well formatted, comprehensive transportation policy and procedure manual are a positive step, but this manual needs to be evaluated for consistency with the Joint Transportation Policy and must be modified to include critical policy and procedural elements that are currently missing.

With respect to the Consortium's use of Routing and Technology, recent progress in the areas of policies and practices and the bell time stagger pilot project provide an excellent base from which to build.

However, significant deficiencies still exist in the setup and use of the available technology, data management processes, and staff organization. These are somewhat compensated by results of the analysis of system effectiveness, which indicates significant recent improvements in bus and bus capacity utilization. Prompt attention to the Consortium's organizational structure and its internal processes will yield substantial benefit to the Consortium.

A number of modifications are required in order to increase the clarity and effectiveness of the Consortium's contracting practices. The primary areas for improvement include the execution of contracts with the Consortium's taxi, parent and municipal service providers, since the lack of such contracts exposes the Consortium to risks. The Consortium should also develop policies and procedures for managing real and perceived conflict of interest situations. The implementation of such policies will become particularly critical as the Consortium moves forward with the eventual implementation of competitive procurement of operator services. Lastly, the Consortium should implement a thorough, documented operator auditing and monitoring process in order to ensure that operator performance is in line with the Consortium's expectations.

As a result of this review of current performance, the Consortium has been rated **Moderate- Low**. Based on this evaluation, the transportation funding gap for both the Renfrew County District School Board (RCDSB) and the Renfrew County Catholic District School Board (RCCDSB) for 2009/2010 school year will be narrowed as determined by the formula in Table 1. The detailed calculations of disbursements are outlined in section seven of this report and summarized below.

Renfrew County District School Board	\$221,725
Renfrew County Catholic District School Board	\$11,907

(Numbers will be finalized once regulatory approval has been obtained)

1 Introduction

1.1 Background

1.1.1 Funding for student transportation in Ontario

The Ministry provides funding to Ontario's 72 School Boards for student transportation. Under Section 190 of the *Education Act* (Act), School Boards "may" provide transportation for pupils. If a School Board decides to provide transportation for pupils, the Ministry will provide funding to enable the School Boards to deliver the service. Although the Act does not require School Boards to provide transportation service, all School Boards in Ontario provide service to eligible elementary students and most provide service to eligible secondary students. It is a School Board's responsibility to develop and maintain its own transportation policies, including safety provisions.

In 1998-1999, a new education funding model was introduced in the Province of Ontario outlining a comprehensive approach to funding School Boards. However, a decision was made to hold funding for student transportation steady, on an interim basis, while the Ministry worked to develop and implement a new approach. From 1998/1999 to 2008/2009, an increase of over \$247 million in funding has been provided to address increasing costs for student transportation, such as fuel price increases, despite a general decline in student enrolment.

1.1.2 Transportation reform

In 2006-07, the government began implementing reforms for student transportation. The objectives of the reforms are to build capacity to deliver safe, effective, and efficient student transportation services, achieve an equitable approach to funding, and reduce the administrative burden of delivering transportation, thus allowing School Boards to focus on student learning and achievement.

The reforms include a requirement for consortium delivery of student transportation services, effectiveness and efficiency reviews of transportation consortia, and a study of the benchmark cost for a school bus incorporating standards for safe vehicles and trained drivers.

1.1.3 The formation of school transportation consortia

Ontario's 72 School Boards operate within four independent systems:

- English public;

- English separate;
- French public; and
- French separate.

As a result, a geographic area of the province can have as many as four coterminous School Boards (i.e. Boards that have overlapping geographic areas) operating schools and their respective transportation systems. Opportunities exist for coterminous School Boards to form a consortium and therefore deliver transportation for two or more coterminous School Boards in a given region. The Ministry believes in the benefits of consortia as a viable business model to realize efficiencies. This belief was endorsed by the Education Improvement Commission in 2000 and has been proven by established consortium sites in the province. Currently, the majority of School Boards cooperate to some degree in delivering transportation services. Cooperation between School Boards occurs in various ways, including:

- One School Board purchasing transportation service from another in all or part of its jurisdiction;
- Two or more coterminous School Boards sharing transportation services on some or all of their routes; and
- Creation of a consortium to plan and deliver transportation service to students of all partner School Boards.

Approximately 99% of student transportation service in Ontario is provided through contracts between School Boards or transportation consortia and private transportation operators. The remaining 1% of service is provided using Board-owned vehicles to complement services acquired through contracted private transportation operators.

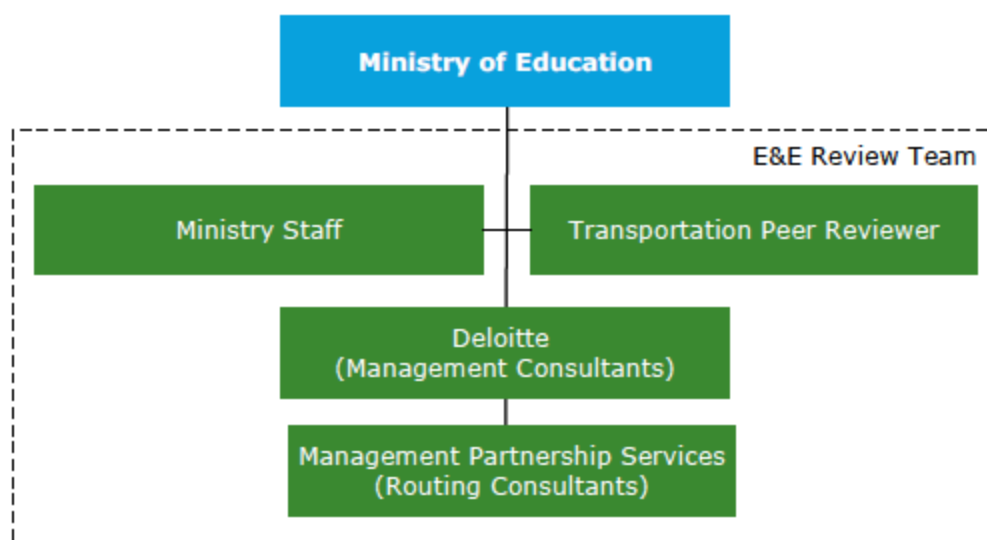
1.1.4 Effectiveness and Efficiency Review

According to the Ministry consortium guidelines, once a consortium has met the requirements outlined in memorandum SB: 13, dated July 11, 2006, it will be eligible for an E&E review. This review will be conducted by the E&E Review Team who will assist the Ministry in evaluating Consortium Management; Policies and Practices; Routing and Technology; and Contracts. These reviews will identify best practices and opportunities for improvement and will provide valuable information that can be used to inform future funding decisions. The Ministry has established a multi-phase approach to review the performance of consortia (collectively the “E&E Reviews”) across the province.

1.1.5 The E&E Review Team

To ensure that these reviews are conducted in an objective manner, the Ministry has formed a review team (see Figure 1) to perform the E&E Reviews. The E&E Review Team was designed to leverage the expertise of industry professionals and management consultants to evaluate specific aspects of each consortium site. Management consultants were engaged to complete assessments on Consortium Management and Contracts. Routing consultants were engaged to focus specifically on the acquisition, implementation, and use of routing software and related technologies and on policies and practices.

Figure 1: E&E Review Team



1.2 Scope of Deloitte Engagement

Deloitte was engaged to lead the Team and serve as the management consultants on the E&E Review Team. Deloitte's overall role is as follows:

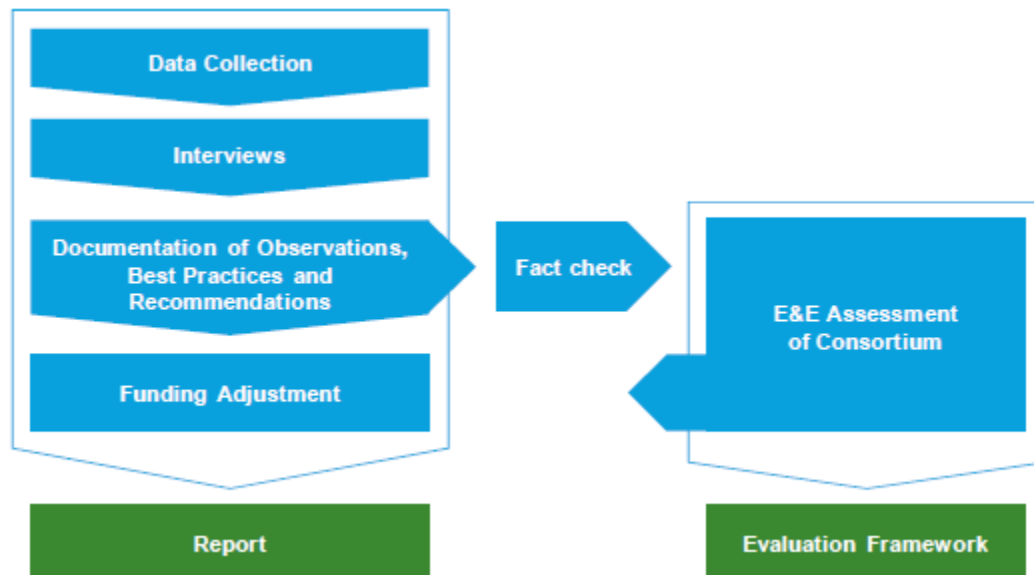
- Lead the planning and execution of E&E Reviews for each of the 18 transportation consortia to be reviewed in Phases Three and Four (currently in phase 3C);
- At the beginning of each E&E Review, convene and moderate E&E Review Team planning meetings to determine data required and availability prior to the review;
- Review consortium arrangement, governance structures and contracting procedures;

- Incorporate the results of the routing and technology and policies and practices reviews completed by MPS into the final report; and
- Prepare a report for each consortium that has been subject to an E&E Review in Phases three and four. The target audience for the report will be the Ministry, the consortium, and its Member School Boards. Once finalized, each report will be released to the consortium and its Member School Boards.

1.3 Methodology Used to Complete E&E Review

The methodology for the E&E Review is based on the six step approach presented in Figure 2 and elaborated below:

Figure 2: E&E Review Methodology



A site review report that documents the observations, assessments and recommendations is produced at the end of a site review. The Evaluation Framework has been developed to provide consistency and details on how the Assessment Guide was applied to reach an Overall Rating of each site.

1.3.1 Step 1 – Data collection

Each consortium under review is provided with the E&E Guide from the Ministry of Education. This guide provides details on the information and data the E&E Review Team requires the consortium to collect, organize and provide.

Data is collected in four main areas:

1. Consortium Management;
2. Policies and Practices;
3. Routing and Technology; and
4. Contracts.

1.3.2 Step 2 – Interviews

The E&E Review Team identifies key consortium staff, outside stakeholders and key policy makers with whom interviews are conducted to further understand the operations and key issues impacting a consortium's delivery of effective and efficient student transportation services.

1.3.3 Step 3 – Documentation of observations, Best Practices and Recommendations

Based on data collected and interviews conducted, the E&E Review Team documents their findings under three key areas:

- Observations that involve fact based findings of the review, including current practices and policies;
- Best Practices used by the consortium under each area; and
- Recommendations for improvements based on the Assessment Guide. . A summary of the key criteria used in the Assessment Guide to determine the effectiveness and efficiency of each consortium is as under:-

Consortium management

- Distinct entity focused on providing student transportation services for member boards
- Well defined governance and organizational structure with clear roles and responsibilities
- Oversight body exists with the mandate to provide strategic directions to Consortium management on the provision of safe, effective and efficient transportation service to support student learning

- Management has communicated clear goals and objectives of the Consortium and these are reflected in the operational plan
- The Consortium takes a comprehensive approach to managing human resources
- Well established accountability framework reflected in the set up and operation of the Consortium including documentation of terms in a Consortium Agreement
- Operations are regularly monitored and performance continually improved
- Financial processes ensure accountability and transparency to member boards
- A budgeting process is in place ensuring timely preparation and monitoring of expenses
- All of the Consortium's key business relationships are defined and documented in contracts
- Governance committee focuses only on high level decisions
- Organizational structure is efficient and utilizes staff appropriately
- Streamlined financial and business processes
- Cost sharing mechanism is well defined and implemented
- The Consortium has appropriate, documented procedures and confidentiality agreements in place governing the use of student data and ensuring compliance with Freedom of Information and Privacy legislation

Policies and Practices

- Safety programs are established for all students using age appropriate training tools
- Development of policies is based on well defined parameters dictated by the strategic goals of the governance structure and Consortium Management operating plans
- A mechanism is defined to allow for regular review and consideration of policy and practice changes to address environmental changes

- Established procedures allow for regular feedback on the impact that current and proposed policy and procedural changes would have on costs, safety and service levels
- Regular monitoring and evaluation of policy expectations is conducted to ensure their continued relevancy and service impacts
- Enforcement procedures are well defined and regularly executed with timely follow-up
- Harmonized transportation policies incorporate safety, operational and cost considerations
- Position-appropriate delegation of decisions to ensure the efficiency of decision making
- Operational alternatives to traditional practices are considered and implemented where reasonable and appropriate
- Service levels are well defined, considerate of local conditions, and understood by all participating stakeholders
- Policy and practice modifications for students with special needs are considered in terms of both the exceptionality and its service and cost impacts

Routing and Technology

- Transportation management software has been implemented and integrated into the operational environment
- Key underlying data sets (e.g., student and map data) are regularly updated:
- Responsibility and accountability for the updates is clearly defined and performance is regularly reviewed
- Coding structures are established to facilitate scenario modeling and operational analysis of designated subgroups of students, runs, schools, etc.
- Procedures are in place to use software functionality to regularly evaluate operational performance and model alternatives to traditional practices
- Disaster recovery plans and back up procedures are established, performed regularly, and tested

- Operational performance is regularly monitored through KPI and reporting tools are used to distribute results to appropriate parties
- Technology tools are used to reduce or eliminate manual production and distribution activities where possible in order to increase productivity
- Training programs are established in order to increase proficiency with existing tools
- Route planning activities utilize system functionality within the defined plan established by Consortium management

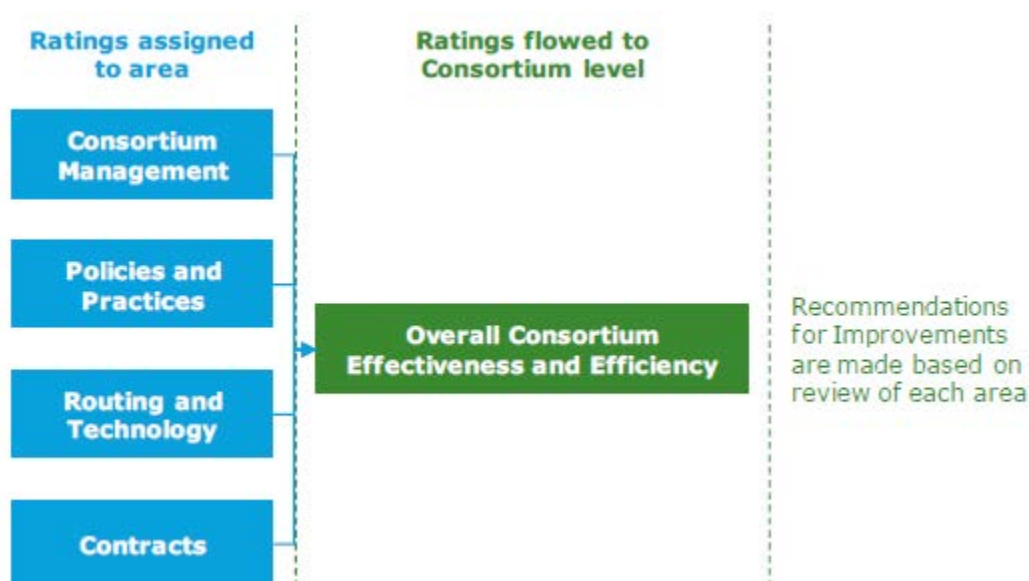
Contracts

- Contracts exist for all service providers, including taxi, boat and/or municipal transit services and parent drivers
- Contracts are structured to ensure accountability and transparency between contracted parties
- All operator contracts are complete with respect to recommended clauses
- Compensation formulae are clear
- Operator contracts are in place prior to the start of the school year
- Procurement processes are conducted in line with the Consortium's procurement policies and procurement calendar
- The Consortium has laid the groundwork for, or is actively using, competitive procurement processes
- Proactive efforts are made to ensure operator contract compliance and legal compliance
- The Consortium collects and verifies information required from operators in contracts
- The Consortium actively monitors and follows up on operator on-the road performance using random, documented route audits or their equivalent
- The Consortium avoids using School Board owned vehicles

1.3.4 Step 4 and 5 – E&E assessment of consortium and site report

The Assessment Guide was developed to enable the E&E Review Team to provide each consortium that undergoes an E&E Review with a consistent, fair, and transparent method of assessment. The Assessment Guide is broken down along the four main components of review (i.e. Consortium Management, Policies and Practices, Routing and Technology, and Contracts) and, for each, illustrates what constitutes a specific level of effectiveness and efficiency (refer to Figure 3 for diagram of process).

Figure 3: Assessment of consortia - Ratings Analysis and Assignment



The Evaluation Framework provides details on how the Assessment Guide is to be applied, including the use of the Evaluation Work Sheets, to arrive at the final Overall Rating. The E&E Review Team then compiles all findings and recommendations into an E&E Review Report (i.e. this document).

1.3.5 Funding adjustment

The Ministry will use the results of the E&E Reviews and the cost benchmark study to inform any future funding adjustments. Only School Boards that have undergone E&E Reviews are eligible for a funding adjustment. Table 1 below illustrates how the Overall Rating will affect a Board's transportation expenditure-allocation gap.

Table 1: Funding Adjustment Formula

Overall Rating	Effect on deficit Boards¹	Effect on surplus Boards¹
High	Reduce the gap by 100% (i.e. eliminate the gap)	No in-year funding impact; out-year changes are to be determined
Moderate-High	Reduce the gap by 90%	Same as above
Moderate	Reduce the gap by 60%	Same as above
Moderate-Low	Reduce the gap by 30%	Same as above
Low	Reduce the gap by 0%	Same as above

The Ministry has announced, through memorandum 2009:B2 dated March 27, 2009, that effective from the 2009/2010 school year, in addition to the funding adjustments made based on the overall E&E rating, for any consortium not achieving a high rating in Routing and Technology, a negative adjustment of one percent to a Board's transportation allocation will be made to recognize potential efficiencies through ongoing routing optimization and technology use. To acknowledge sites whose systems are already operating in an efficient manner, the adjustment will only apply to School Boards that have not achieved a "high" rating in Routing and Technology from the Effectiveness and Efficiency reviews. School Boards that achieve a "high" rating in the Routing and Technology area in future reviews will be exempt from the reduction in the subsequent year.

1.3.6 Purpose of report

This Report serves as the deliverable for the E&E Review conducted on the Consortium by the E&E Review Team during the week of October 5, 2009.

1.3.7 Material relied upon

Refer to Appendix 3 for a list of documents that the E&E Review Team relied upon for their review. These documents were used in conjunction with interviews with key Consortium staff, outside stakeholders, and key policy makers to arrive at the assessment and rating of the Consortium.

¹ This refers to Boards that have a deficit/surplus on student transportation (see Section 7 – Funding Adjustments)

1.3.8 Limitations on the use of this report

The purpose of this Report is to document the results of the E&E Review of the consortium. The E&E Review is not of the nature or scope so as to constitute an audit made in accordance with generally accepted auditing standards. Therefore, as part of this E&E Review, Deloitte has not expressed an opinion on any financial statements, elements, or accounts to be referred to when reporting any findings to the Ministry. Additionally, procedures used by the E&E Review Team are not intended to disclose defalcations, system deficiencies, or other irregularities.

2 Consortium Overview

2.1 Consortium Overview

The Renfrew County Joint Transportation Consortium (RCJTC or the Consortium) provides transportation services for the Renfrew County District School Board (RCDSB) and the Renfrew County Catholic District School Board (RCCDSB). The Consortium provides transportation services to approximately 11,711² elementary and secondary students using 253 vehicles covering over 25,482 kilometres each day. The service area covers approximately 7,851 square kilometres, and includes 52 elementary and secondary schools. These transportation services are provided primarily through a combination of bus operators with a small number of students being transported by taxis, parent drivers and municipal operators.

The RCDSB and the RCCDSB have a long history of sharing transportation services; the two School Boards first established a joint transportation policy in 1989. The Consortium was officially established in 2006 through the submission of a Consortia Plan to the Ministry and its legal structure has not changed significantly since then. The Consortium's current legal structure is best described as indeterminate since there is no agreement between the member boards indicating that the Consortium is either a partnership or a separate legal entity.

The geographic area covered by the Consortium is predominately rural with a few urban areas. The service area stretches from Deux Rivières in the north to Arnprior in the south as well as from Pembroke in the east to Barry's Bay in the west respectively.

Table 2 and Table 3 below provide a summary of key statistics and financial data of each Member Board:

² These numbers were provided by the Consortium and may not match those in Table 2 below due to timing and/or reporting differences.

Table 2: 2008/2009 Transportation Survey Data³

Item	RCDSB	RCCDSB	Total Consortium
Number of schools served	30	22	52
Total general transported students	5,592	2,948	8,540
Total special needs ⁴ transported students	174	25	199
Total wheelchair accessible transportation	11	11	22
Total specialized program ⁵ transportation	403	-	403
Total courtesy riders	908	130	1,038
Total hazard riders	348	477	825
Total public transit riders	-	-	-
Total students transported daily	7,436	3,591	11,027
Total contracted full and mid-sized buses ⁶	145	67	212
Total contracted mini buses	7	12	19
Total contracted school purpose vehicles ⁷	15	5	20
Total contracted PDPV	-	-	-
Total contracted taxis	-	-	-
Total number of contracted vehicles	167	84	251

³ Data reported in this section of the report may be inconsistent with data presented in other sections due to the different timing of data collection

⁴ Includes students requiring special transportation such as congregated and integrated special education students who require dedicated routes and/or vehicles; students who must ride alone; students who require an attendant on the vehicle

⁵ Includes students transported to French Immersion, magnet and gifted programs, students with special needs who are transported to specialized programs are captured as special needs transported students.

⁶ Includes full-sized buses, mid-sized buses, full-sized buses adapted for wheelchair use and mid-sized buses adapted for wheelchair use; all vehicle counts are rounded to the nearest whole number.

⁷ Includes school-purposed vans, mini-vans, and sedans.

Table 3: 2008/2009 Financial Data

Item	RCDSB	RCCDSB
Allocation	\$7,292,509	\$3,937,431
Net expenditures	\$8,031,592	\$3,977,119
Transportation surplus (deficit)	(\$739,083)	(\$39,688)
Percentage of transportation expenses allocated to the Consortium	100%	100%

3 Consortium Management

3.1 Introduction

Consortium Management encompasses the management of the entire organization providing student transportation services. The analysis stems from a review of the four key components of Consortium Management:

- Governance;
- Organizational Structure;
- Consortium Management; and
- Financial Management.

Each component has been analyzed based on information provided by the Consortium and from information collected during interviews. The analysis included an assessment of areas requiring improvement that were informed by a set of known best practices identified during previous E&E Reviews. These results are then used to develop an E&E assessment for each component. The E&E assessment of Consortium Management for the Consortium is as follows:

Consortium Management – E&E Rating: Low

3.2 Governance

Governance refers to the way in which an organization is directed and controlled. Establishing administrative structures and processes that facilitate, monitor, measure and improve effective business management are primary responsibilities of a governance structure. Three key principles for an effective governance structure are: accountability, transparency, and the recognition of stakeholders. In order to respect these three principles, it is important that the governance body of the organization be independent of the team responsible for the day-to-day operations of the organization.

3.2.1 Observations

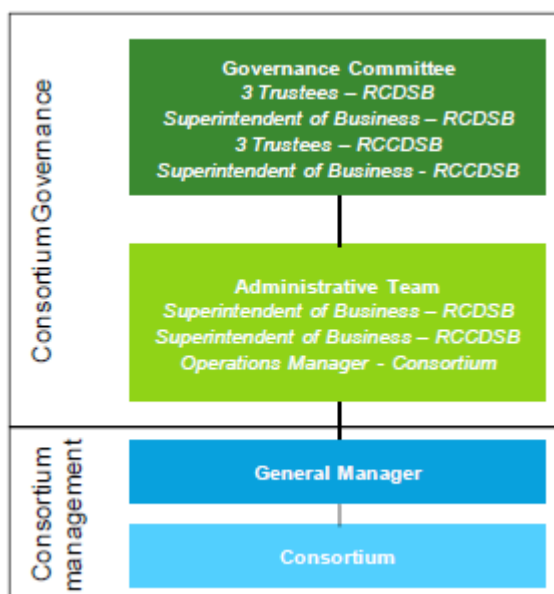
Governance structure

The Consortium's governance structure is documented at a high-level in its Consortia Plan submission to the Ministry and in additional letters sent to the Ministry by Member Boards. There is currently no formal agreement that outlines the structure, roles and responsibilities of the Consortium's governance. Interviews with School Board

representatives and members of the Consortium's governance structures (the Administrative Team and Governance Committee, as illustrated below) indicated that members themselves are neither clear nor in agreement as to what their roles and responsibilities are or should be. The primary responsibility for Consortium decision making is retained at the School Board level.

The Consortia plan submission and a letter sent to the Ministry (dated November 8, 2007) outlines the following governance structure for the Consortium:

Figure 4: Consortium Governance



Governance Committee

The Governance Committee meets once a month for two hours. A meeting schedule is set out in advance and meeting minutes are taken, ratified and signed. Agendas are set in advance by mutual agreement and the responsibility for chairmanship alternates between the two School Boards.

Discussions with Consortium management and members of the Governance Committee indicated that the Governance Committee is responsible for five primary areas of decision making: budgeting, bargaining, policy making, personnel management, and the management of legal and/or political issues. Issues in these categories are escalated from the Administrative Team to the Governance Committee and, once a consensus is reached, the issue is escalated to the Member Boards with a recommendation. Final decision making power is retained by the Member Boards.

Administrative Team

The Administrative Team; comprised of the Superintendents of Business from each Member Board and the Consortium's General Manager, is primarily responsible for managing concerns related to the implementation of Consortium policies and dealing with larger operational issues such as negotiating the contract with bus operators and setting the annual budget. As such, the Administrative Team is involved with the day-to-day management of the Consortium. The Administrative Team is also the primary body responsible for managing appeals. While a set schedule for Administrative Team meetings is currently in place, ad-hoc meetings are also often held in order to facilitate the Consortium's efforts toward becoming fully operational. Meeting minutes are currently not taken.

Discussions with Consortium management and members of the Consortium's governance structures indicated that implementation, operational and issues management plans are developed by the General Manager and escalated to the Administrative Team for discussion and approval.

While the descriptions above indicate some precision with respect to the roles and responsibilities of the Consortium's governance structures, discussions with Consortium management and members of the Consortium's governance structures indicated a lack of clarity with respect to their specific decision making powers and roles. There is currently no documentation that clarifies these roles. These discussions also indicated that the decision making process can sometimes be protracted due to the various levels of approval required, and due to the limited availability of senior members of the Consortium's governance structures, and School Board decision making procedures.

Board level governance and arbitration clause

The Consortium does not have a mutually agreed upon, documented dispute resolution or arbitration process. The nearest proxy to a dispute resolution process is included in a 2007 revision to the Consortita plan submission to the Ministry that has yet to be signed off. This states that disputes will first be escalated to a corollary of the Administrative Team (named the Management Structure in the document), then to the Governance Committee, then submitted to an Arbitration Board comprised of a trustee and Director of Education from each Member Board, and a mutually agreed upon Chair that is unaffiliated with each School Board. Decisions of the Arbitration Board require a 50% plus one majority.

3.2.2 Recommendations

Create and document a policy framework for the Consortium's governance structures

It is recommended that Member Boards work together to document the Consortium's governance structure in an executed agreement between the two Member Boards. This documentation may be included as part of a Consortium Agreement and should, at minimum, outline the following:

- The process and individuals involved with the selection of Governance Committee and Administrative Team members;
- The structure of the Governance Committee and Administrative Team. The Consortium's governance structures should be comprised of equal members from all School Boards;
- The term of all individuals involved with governing the Consortium;
- The roles and responsibilities of all individuals involved with overseeing the Consortium;
- The roles and responsibilities of the Consortium's governance structures;
- Decision-making requirements (i.e. majority votes, unanimity requirements) and processes; and
- Dispute resolution processes between the Member Boards. This process may be similar to the draft process outlined in section 3.2.1 above.

Separate Consortium operations from governance

An effective governance structure calls for a clear line to be drawn between the Consortium's governance structures and Consortium management. This line is less easily determined when there is a governance level position that executes both a monitoring function over, and management function within, the Consortium. While it is recognized that the input of both the General Manager and Member Board officials are clearly value added, the oversight function of the Consortium's governance is weakened by the combination of Consortium operations and governance. It is therefore recommended that the delineation between operational and oversight responsibilities within the Consortium be agreed upon, documented, and then implemented in practice.

Re-evaluate the decision-making rights of the Consortium's governance structures

Discussions with Consortium management and members of the Consortium's governance structures indicated that decision making at the Consortium can often be protracted due to the various levels of approval required by the Consortium's current governance structure as well the generally infrequent meetings of the Consortium's Governance Committee. Given that Consortium Governance Committee members indicated a desire to move forward quickly with the Consortium's development, both Member Boards should work together to evaluate alternative governance structures that could be implemented that may provide for faster decision making without compromising effective oversight. In particular, Member Boards should discuss the appropriate delegation of decision making authority and the distinction between the types of items that need to be brought forward for approval versus those that can be brought forward for information.

Administrative Team meetings should be documented and ratified

Decisions made by the Administrative Team can have a significant impact on the operations of the Consortium, particularly because this committee deals with a number of the Consortium's most critical operational issues. These meetings should therefore be officially documented, ratified and signed in a manner similar to that used for meetings of the Governance Committee. These meeting minutes should also be shared with the Governance Committee in order to enhance the clarity of the Consortium's governance processes.

3.3 Organizational structure

An optimized organizational structure can promote effective communication and coordination which will enable operations to run more efficiently. The roles and responsibilities within the organization should be well defined. This will lead to operational efficiencies by ensuring tasks are not being duplicated and issues raised can be addressed effectively by Consortium management. Ideally, the organization is divided functionally (by department and/or area); all core business functions are identified; and there is an appropriate allocation of general management and operational responsibility.

3.3.1 Observations

Entity Status, formation and agreement

The Consortium does not currently have an executed Consortium Agreement in place. The Consortium's current legal structure is best described as being in transition - it is

not a separate legal entity and there is no executed agreement establishing its status as a partnership between the two Member Boards.

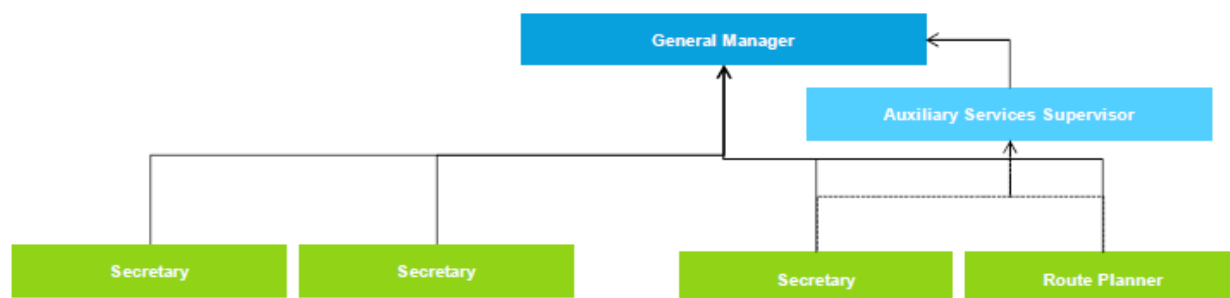
Member Boards are aware of the issues surrounding incorporation and are generally in favour of initiating the process. Meeting minutes provided to the E&E Review Team indicate that the Governance Committee considered incorporation in late 2008, but that little progress has been made since.

Organization of entity

Consortium staff are employed by the two Member Boards and all staff are members of their respective School Board's collective bargaining units. Discussions with Consortium management indicated that the Consortium intends to incorporate prior to discussing rotations and job assignments with the collective bargaining units. As such, the collective bargaining units currently retain the right to move employees in and out of their roles within the Consortium. Confidentiality agreements have been signed by all employees.

Discussions with Consortium management indicated that the roles identified above are currently in a state of flux due to the recent amalgamation of staff in one location. The following diagram represents the organizational structure currently in place at the Consortium (as presented to the E&E Review Team during discussions with Consortium management):

Figure 5: Current Consortium structure



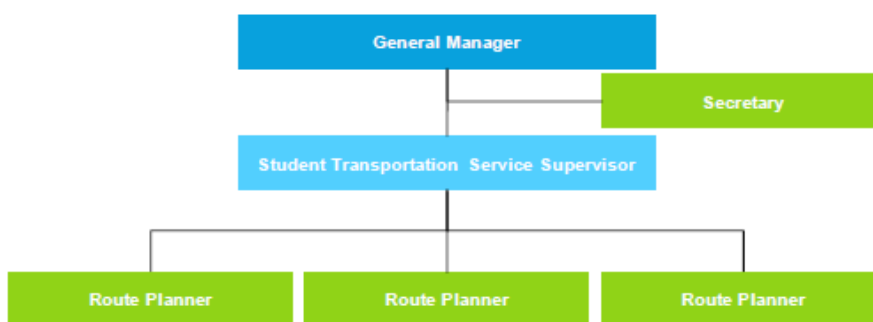
Explanatory note: One Secretary and the Route Planner are supervised by the Auxiliary Services Supervisor as they are members of the same collective bargaining unit; all employees report to the General Manager.

The position of Secretary identified above reflects the role played by these individuals while they were still a part of their respective Member Boards. Consortium management indicated that it intends to restructure the role played by the Secretaries to reflect that of the Route Planner. This restructuring of roles, in the opinion of Consortium management, will leave the Consortium right-sized.

The Consortium engaged a third party contractor to develop a new organizational structure for the Consortium and job descriptions for each position. These draft job descriptions have been provided to the E&E Review Team but have not been approved by the Consortium's governance structures. Based on the E&E Review Team's discussions with Consortium management, these job descriptions do not reflect the actual roles and responsibilities undertaken by staff on a day-to-day basis. It was noted that Consortium management had not seen these job descriptions prior to their distribution to the E&E Review Team.

The following is the organizational structure proposed in the draft, unapproved job descriptions:

Figure 6: Proposed Consortium structure



Explanatory note: The Consortium proposes to rename the Auxiliary Services Supervisor's position to Student Transportation Service Supervisor

Discussions with Consortium management also indicated that the General Manager does not currently have an employment contract.

3.3.2 Recommendations

Execute a binding Consortium Agreement between the RCDSB and RCCDSB

It is recommended that a Consortium Agreement be signed by all Member Boards to ensure that all parties agree on the terms of the Consortium and, more specifically, on key elements of its structure and operations. This agreement should contain, at a minimum, the following clauses:

- The purpose and structure of the Consortium – the Consortium Agreement should clearly outline the Member Board's rationale for creating the Consortium as well as its fundamental purpose as an organization. It should further outline the relationship between the Consortium and its Member Boards as well as the Consortium's membership structure;

- Responsibilities delegated to the Consortium – defining the responsibilities delegated to the Consortium by its Member Boards helps to ensure clarity in operations and separates the functions of the Consortium from those of its Member Boards;
- Governance structure – documenting the Consortium’s governance structure will help with the development of processes that facilitate, monitor, measure and improve effective business management within the Consortium;
- Policies and procedures to be used – this will guide the operations of the Consortium and will facilitate the equitable treatment of each School Board’s students;
- Cost sharing policies for all costs (operating and administrative) - A documented and fair methodology for cost sharing should be made available to ensure equity between the Member Boards and to ensure accountability over costs and adequate operational cash flow for the financial obligations of the Consortium;
- Other clauses outlining the term of the agreement; conditions for termination, School Board-level dispute resolution processes; confidentiality and the treatment of information; and the maintenance of adequate insurance coverage by both the School Boards and the Consortium.

Establish the Consortium as a separate legal entity

The Consortium’s current transitional status as a provider of transportation services implies that all Member Boards involved may be held jointly liable for all debts and liabilities associated with the RCJTC. The current structure has several inherent risks which make it a less than optimal structure for coordinating student transportation:

- The risk that the actions of one Member school Board may be leaving the other Member Boards open to liability;
- The risk that one Member Board can be involved in litigation for issues involving students that are not part of their School Board; and
- The risk that liability, brought about through the Consortium’s joint status, may exceed its Member Board’s existing insurable limits. The Consortium should investigate, with the assistance of its Member Board’s insurance carrier, its coverage related to, but not limited to, punitive damages, human rights complaints, and wrongful dismissal lawsuits. It is recommended that the Consortium investigate, with its insurance carrier, the applicability of errors and omissions insurance.

Based on these risks, the Member Boards should explore the establishment of the Consortium as a Separate Legal Entity through incorporation to formalize and improve its current contracting practices. The creation of a Separate Legal Entity effectively limits risk to the Member school Board for activities related to the provision of student transportation. Thus, when an incorporated entity takes responsibility for student transportation services, this incorporated entity status is an effective safeguard against any third party establishing liability on the part of Member Boards.

A Consortia Entity Resource Guide available through the Ministry's student transportation website can provide further assistance with this planning and decision making process.

Clearly communicate lines of responsibility and reporting

It is recommended that Consortium management actively establish and communicate clear lines of responsibility and reporting to allow staff to take ownership over their work and to create an appropriate system by which issues can be escalated to Consortium management.

Create relevant job descriptions for all positions within the Consortium

Job descriptions provided to the E&E Review Team have not been approved by the Consortium's governance structures and, based on discussions with Consortium management; neither reflect actual operational responsibilities nor the Consortium's actual organizational structure. It is therefore, recommended that the Consortium modify its job descriptions to reflect actual operational responsibilities and to facilitate the effective segregation of responsibilities within the Consortium. These modified job descriptions will then allow staff to efficiently execute on their daily duties and will also help to ensure a smooth transition in the event of staff turnover.

Execute employment contracts with all Consortium staff

It is recommended that the Consortium execute an employment contract with the General Manager as soon as possible. The availability of such a contract will not only help to clarify the General Manager's current roles and responsibilities, it will also provide the Consortium with established leadership and stability as it progresses through its current period of transition.

Discuss job rotation of Consortium staff with collective bargaining units

It is recommended that the Consortium and Member Boards work with their collective bargaining units to determine solutions to existing agreements related to staff rotation. This is to ensure the retention of the investment made in specialized staff training.

3.4 Consortium Management

Consortium Management focuses on the operational aspects of the organization. This includes ensuring accountability of staff, focusing on continual improvement through operational planning, and risk management by having appropriate contracts and agreements in place to clearly define business relationships.

3.4.1 Observations

Cost sharing

The Consortium does not currently have a cost-sharing agreement in place and the closest proxy is the Consortia plan submitted to the Ministry. Discussions with Consortium management indicated that transportation expenditures are shared according to weighted student ridership. These discussions also indicated that a cost sharing formula for administration expenses is currently being discussed by the Administrative Team.

Transportation service agreements

The Consortium does not currently have transportation service agreements in place that outline the service-level expectations of the Member Boards.

Purchase of service agreements/support services

The Consortium currently purchases IT Network and communications services from the RCCDSB and shares its office space with that School Board's plant and warehousing department. The Edulog server and filing and printing services are currently purchased from the RCDSB. Accounting services are purchased from both Member Boards. Purchase of service agreements are not currently in place for any of these relationships.

The Consortium purchases services from Edulog for its transportation software. This relationship is documented in a standard license and maintenance agreement signed between with the software vendor and the Consortium's Member Boards.

Procurement policies

The Consortium does not currently have procurement policies in place that document the various procurement methods to be used by the Consortium based on the value of the goods being purchased. Consortium management indicated that the Consortium adopts the purchasing policies of its Member Boards depending on the School Board through which the good or service is being procured.

Banking

Consortium management indicated that the majority of the Consortium's banking services are provided by the RCDSB. However, there is currently no purchase of service agreement in place that documents this relationship.

Insurance

The Consortium does not currently have its own insurance. The E&E Review Team has not been provided with any documentation indicating that the insurance policies held by Member Boards has been extended to the Consortium. Discussions with Consortium management and members of the Consortium's governance structures indicated that Member Boards do not consider it necessary to have a separate insurance policy for the Consortium until the Consortium obtains separate legal entity status.

Staff performance evaluation, training and management

Staff performance evaluations are currently not conducted at either the Consortium or School Board level. Discussions with Consortium management indicated that this is currently a collective bargaining issue for both Member Boards and that evaluations are conducted on an informal basis within the Consortium. The Consortium's goals and objectives are communicated to staff through formal monthly staff meetings. Staff meetings are scheduled in advance and meeting minutes are taken and ratified.

The Consortium does not currently have training plans in place for staff members and the training provided to Consortium staff is currently neither documented nor tracked over time. Discussions with Consortium management indicated that the Consortium takes advantage of all external training opportunities made available to it and that internal training is currently also provided on an informal basis.

Succession plans are not currently in place and Consortium staff are not cross-trained in each other's responsibilities.

Long and short term planning

The Consortium does not have a formal strategic planning process in place. A Guiding Principles document has been developed by the Consortium but not yet been approved. An operational and strategic plan has been prepared and approved.

The Guiding Principles document outlines the overarching principles that are to guide the operation of the Consortium. The content of this document is included in the Consortium's draft strategic plan, which has been presented and approved by the Consortium's governance structures. The draft strategic plan outlines the Consortium's mission statement; and lays out, in broad terms, the strategic goals of the Consortium

over the next five year period. Some of the Consortium's strategic goals include incorporating as a separate legal entity; extending the restructuring of the transportation schemes (i.e. extending the staggered bell time's pilot); implementing a competitive procurement process; and expanding pupil and driver safety programs.

The operational plan presented to the E&E Review Team was developed prior to the strategic plan and was originally intended to guide the Consortium as it restructured its transportation schemes. It was then extended to include additional elements in order to prepare for the E&E Review.

While there is some overlap between the items listed in the strategic plan and the operational plan, this link was not made intentionally as the operational plan was developed before the strategic plan.

Key performance (service) indicators (KPIs)

Discussions with Consortium management indicated that the Consortium does not currently perform formal, documented reviews of its own performance using Key Performance Indicators. The Consortium does, however, review some KPIs on an informal basis. KPIs used include student ride times; the number of student transported; vehicle utilization; average route distances and other route information. The Consortium presents these KPIs to its Member Boards on an annual basis.

3.4.2 Best Practices

It is recognized that the Consortium has demonstrated best practices in the following areas:

Staff meeting minutes

Consortium management communicates its goals and objectives to staff at scheduled monthly staff meetings. Minutes of these staff meetings are kept and ratified, thus helping to clarify delegated responsibilities, enhancing performance measurement and communication with the Consortium's governance structures, and promoting a culture of teamwork and cohesion.

3.4.3 Recommendations

Execute a documented cost sharing agreement

In line with recommendation 3.3.2.1 regarding the creation of a binding Consortium Agreement, it is recommended that the Consortium develop and document an equitable methodology for the sharing of transportation, operational and administrative costs

between the Member Boards. This will help to ensure accountability over costs; clarity and predictability during the budgeting process, and will also mitigate the risk of future disagreements arising between Member Boards due to misunderstandings or miscommunication.

Execute transportation service agreements with all Member Boards

Upon attainment of separate legal entity status, the Consortium should execute a transportation service agreement that is jointly signed by all Member Boards. This document should outline all clauses that are relevant to the provision of transportation services such as the scope of services to be provided, fees, insurance/liabilities, quality of service, and dispute resolution.

Execute purchase of service agreements with all Member Boards

There are currently no contracts between the Consortium and its Member Boards for services that the Boards provide to the Consortium. Therefore, services are obtained by the Consortium without terms, conditions, and service levels normally associated with such arrangements. It is recommended that all of the services which the Consortium procures be established via agreements or contracts where the mutual interests of the Consortium and each school Board are documented and agreed upon.

Develop procurement policies for the Consortium

An effective procurement policy will identify the type of procurement method to be used for a given size, type and complexity of good or service being purchased. The Consortium should establish formal procurement policies or adopt the policies of one of its Member Boards once reviewed for appropriateness in transportation purchasing decisions, internal controls and work processes. Particular attention should be paid to the purchasing thresholds associated with the initiation of a competitive procurement process.

Formalizing these policies will ensure standardization in the procurement methods of the Consortium and will also act as an accountability mechanism by providing clarity to the Consortium and the Member Boards. It will also allow the Consortium to harmonize each Board's purchasing policies while ensuring that these policies are adapted to the particular needs of the Consortium.

Review the applicability and sufficiency of insurance coverage

Member Boards are protected from potential liabilities by the insurance purchased at the Board level. The Consortium does not carry separate insurance specifically for

student transportation services. It is recommended that the Consortium investigate, with its insurance carrier, the applicability of, and need for, insurance for the Consortium.

Implement a documented, formal staff performance evaluation and monitoring process

While it is recognized that the staff evaluation process is currently a negotiation topic at the school Board level, it is nonetheless recommended that the Consortium develop, document and then implement its own process for staff evaluation so as to ensure an alignment between staff performance and the Consortium's goals and objectives. Effective staff evaluation processes establish clear performance evaluation criteria for each position and are conducted regularly. When implemented effectively, performance evaluations can be a powerful tool to guide and encourage employees to keep the goals and objectives of the overall Consortium in mind during day to day operations.

Building on the above, the Consortium should also develop, document and then implement clear staff training/learning initiatives and plans to promote continuous learning and to ensure that staff are able to fully utilize available technological aids. This is particularly relevant given current plans to restructure the role of the secretaries to resemble that of a route planner.

Modify the strategic plan and document the planning process

It is recognized that the Consortium has developed a strategic planning document that lays out, in broad terms, the Consortium's overarching priorities over the next two to five years. It is recommended that the Consortium modify this document to include additional information as to how these goals and objectives will be achieved and by whom. The strategic goals identified in this document can then be linked to an operational plan that is similar in nature to the operational plan already developed by the Consortium. The long term and short plans, as well the process used to develop these plans, should be documented and sent to the Governance Committee for approval. The development of such a process and document will allow the Consortium to measure its performance against tangible steps and will also allow it to allocate resources effectively to meet Consortium objectives.

The Consortium should also develop a documented, governance approved strategy for the management of transportation costs in areas experiencing declining student enrolment. School enrolment across rural Ontario has been in steady decline over the last decade. Given that the Consortium primarily serves rural areas, and given the Ministry's recent notice that transportation funding is to be reduced in line with declining enrolment, it is recommended that the Consortium incorporate a strategy for the management of transportation costs into its long term planning process. Developing such a plan will provide the Consortium with a framework that will help it address not

only the issue of funding, it will also signal a proactive approach to dealing with issues before they arise – a key element of effective long-term Consortium management.

Implement a regular, documented KPI monitoring process

As the Consortium moves forward, we recommend that it develop a list of Key Performance Indicators that can be used to track its operational performance over time. The list of KPIs to be monitored should be kept to a manageable number and should be regularly tracked to facilitate long-term trend analysis. Examples of KPIs that could be used include:

- Eligible Unassigned Student Lists;
- Student Map Match Rates;
- Average Vehicle Statistics and other route statistics;
- Total Vehicles on Operation; and
- Student Ride Times.

The process to be used to gather and analyze these KPIs should also be documented in a governance- approved KPI monitoring plan. This KPI monitoring plan should define the frequency with which the KPIs will be analyzed and the quantitative thresholds for changes in KPIs above which further action will be taken and reported to the Consortium's governance structures.

Develop policies and procedures related to the treatment of confidential information

The Consortium should develop appropriate, documented policies, procedures and confidentiality agreements to govern the use of confidential information (such as student data and in-bus camera footage) in order to ensure compliance with freedom of information and privacy legislation. These policies and procedures should address all issues related to the collection, storage, use, access, distribution and destruction of information, and should also require the Consortium's governance structures and Member Boards to review and reflect on freedom of information and privacy legislation requirements on a regular basis. The Consortium is further encouraged to review the findings and recommendations contained in the OASBO Guidelines for Sharing Personal Student Information with Transportation Consortia.

3.5 Financial Management

Sound financial management ensures the optimal use of public funds and also ensures the integrity and accuracy of financial information. This includes appropriate internal controls and a robust budgeting process that has a clearly defined planning and review calendar that promotes accountability and sound decision making.

Financial management policies capture roles and responsibilities, authorization levels, and reporting requirements to ensure that a proper internal financial control system is in place for the Consortium. These policies should also clearly define the financial processes of the Consortium in a way that ensures appropriate oversight without impinging on efficiency.

3.5.1 Observations

Budget planning and monitoring

The Consortium does not currently have a budget or budgeting process. Each school Board develops its own transportation budget and the General Manager provides some input into budget allocations for school bus operator contracts, which represents a significant portion of the Consortium's overall allocation.

The budgeting process is initiated by each Member Board's accounting department upon the release of the funding allocations from the Ministry. Allocations for transportation costs are made based on each School Board's ridership; prior history and what is known at that point about the outcomes of the operator negotiations. Ridership numbers are provided to the School Board by the Consortium. The same formula is then applied for taxi and parent-driver allocations. Upon the completion of this process at each member School Board, the SBOs come together to consolidate the budget, after which it is forwarded to the Governance Committee and Member Boards for approval.

Budget-to-actual reconciliations are done at the school Board level on a monthly basis. Discussions with Consortium management and School Board accounting staff indicated that these reports are sent to the General Manager; however, these are not reviewed and signed-off by the General Manager. A final reconciliation also takes place at the end of the year; however, the General Manager does not sign-off on them since ultimate responsibility for these reconciliations rests with the each School Board's SBOs.

Accounting practices and management

Accounting for the Consortium is managed at the school Board level.

The Consortium develops the bus operator invoices on behalf of the bus operators on a bi-monthly basis by drawing routing information from its transportation management software. The Consortium then provides the RCDSB with a list of operators to be paid and the amount the operators are to be paid. A funds transfer is initiated once this is checked by the RCDSB's accounting department.

Taxi operator invoices are first sent to the Consortium and verified by Consortium staff, with final approval resting with the Consortium's General Manager. Once approved, the invoice is sent to the respective member school Board and a funds transfer is initiated.

At present, the RCDSB incurs all cash outlays associated with operator payments, while the RCCDSB provides bi-monthly payments to the RCDSB based on information from the previous year. The RCDSB then issues an invoice to the RCCDSB as part of the year-end reconciliation. Ultimate responsibility for reconciliations rests with the finance department of each Member Board.

The General Manager previously had access to the RCDSB's accounting system; however, his rights were limited to viewing and initiating purchase orders. General Manager has not had access to the accounting system since the Consortium moved to its new location. Ultimate approval for changes to the transportation budget line rests with the Administrative Team's SBO's.

Audit

Both Member Boards are audited on an annual basis. The Consortium itself is not audited.

3.5.2 Recommendations

Modify the budgeting creation and monitoring process

Given that Consortium management has specialized expertise in the financial implications of operating student transportation services, and given that budget allocations ultimately impact the Consortium's ability to provide effective transportation services, it is recommended that the Consortium's budgeting process be modified to allow Consortium management to provide greater input into the final allocations. Having the Consortium develop its own budget also encourages accountability at the Consortium level by requiring the Consortium to commit to a particular level of costs relative to its "income".

Ideally, the General Manager would prepare a detailed budget providing projections by School Board for each type of transportation and administrative cost. This budget could then be sent for approval to the Consortium's governance structures and Member

Boards. The General Manager should also regularly monitor and document actual expenses and perform a review of significant variances between actual and budgeted amounts. The General Manager should present the results of this variance analysis, including explanations for under/overspending, to the Consortium's governance structures on a regular basis.

Modify the operator payment process

Currently, the Consortium develops invoices for bus operator payments that are then sent to Member Boards. The Consortium does not receive invoices from bus operators. It is recommended that this process be modified to more closely resemble the invoicing method used by taxi operators - bus operators should submit invoices to the Consortium for verification prior to them being sent to the Member Boards for payment.

Centralize the Consortium's financial management function

Currently, both Member Boards develop the Consortium's budget and implement the Consortium's accounting. The Consortium's financial management function is therefore neither centralized, nor within the control of Consortium management, who have specialized expertise and knowledge of the financial implications of operating student transportation services. It is therefore recommended that the Consortium either centralize accounting services in-house or purchase accounting services from a single School Board, thus reducing duplication and increasing the Consortium's clarity and accountability.

3.6 Results of E&E Review

This Consortium has been assessed as **Low**. A number of significant modifications are required to the Consortium's governance and organizational structures. In addition, the E&E Review Team also noted that alterations must be made to a number of the Consortium's management and financial practices in order to improve both its effectiveness and efficiency.

The most critical recommendation arising from the assessment of Consortium Management is a review of the decision making authority delegated to the Consortium as well as the delineation between the Consortium's operational responsibilities and the oversight responsibilities of the Consortium's governance structures. This should be completed alongside the attainment of separate legal entity status.

Other recommendations relating to improvements to the Consortium's human resource planning, reporting and financial practices should also be implemented in order to institutionalize effective management practices within the Consortium. The implementation of other recommended modifications to Consortium Management

should also not be viewed as entirely dependent on the attainment of separate legal entity status. Effective HR, planning, reporting and financial practices do not arise from the attainment of a particular legal status, but rather directly reflect the degree to which effective management practices have been institutionalized within the organization. The lack thereof should be addressed in conjunction with the attainment of separate legal entity status.

4 Policies and Practices

4.1 Introduction

Policies and practices examine and evaluate the established policies, operational procedures, and the documented daily practices that determine the standards of student transportation services. The analysis for this area focused on the following three key areas:

- General Transportation Policies & Practices;
- Special Needs and Specialized Programs; and
- Safety and Training Programs.

The observations, findings, and recommendations found in this section of the report are based on onsite interviews with the Superintendent of Business and Area Transportation Officers, and on an analysis of presented documents, extracted data, and information available on the Consortium's website. Best practices, as established by the E&E process, provided the source of comparison for each of these key areas. The results were used to develop an E&E assessment for each of the key components and to determine the overall effectiveness of the Consortium's Policies and Practices as shown below:

Policies and Practices – E&E Rating: Moderate-Low

4.2 Transportation Policies & Practices

The goal of any transportation operation is to provide safe, effective and efficient services. For transportation consortia, it is equally important that service to each of the Member Boards is provided in a fair and equitable manner. To support this goal, it is essential that well defined policies, procedures, and daily practices are documented and supported. Well defined policies ensure that the levels of services to be provided are clearly established while documented procedures and consistent practices determine how services will actually be delivered within the constraints of each policy. To the degree that policies are harmonized, the consistent application of all policies, procedures, and practices ensures that service will be delivered safely and equitably to each of the Member Boards. This section examines and evaluates the policies, operational procedures, daily practices, and their impact on the delivery of effective and efficient transportation services.

4.2.1 Observations

General policy guidelines

A Joint Transportation Policy and Administrative Regulations manual was jointly developed by the RCDSB and the RCCDSB. The General Manager reports that this document currently provides the primary guidance for planning and daily transportation operations. There was an additional manual titled Renfrew County Joint Transportation Consortium presented to the E&E Review Team, but it was reported that these documents have neither been thoroughly reviewed by Consortium staff, nor have they been officially approved or adopted. As such, they are referenced here as draft documents only.

The core policy document currently in use is the Joint Transportation Policy. This is posted on the Consortium's website, and interviews with staff indicate knowledge of its requirements and that staff routinely utilize it for the planning and delivery of transportation services. This document presents fully harmonized operating policies for the two Member Boards, and contains many, but not all, key eligibility and service parameters. The document is a mixture of policy statements and operational procedures. Many of the expected elements are included in this document, although one notable exception is the absence of a dedicated section covering the operational requirements for special needs transportation.

The Joint Transportation Policy is to be supplemented by a redesigned and comprehensive policy and procedure manual. The structure of this new document is consistent with previous best practice models in that each subject is covered in a consistent format, with a policy statement followed by procedural language that defines the implementation of the policy. This approach defines the intent, procedures, and rationale for each policy or procedure. However, there were inconsistencies and redundancies noted between this new document and the Joint Transportation Policy. In addition, some elements covered in the new draft document are inapplicable to the RCJTC operations while other elements that should be included are absent. Further review and modification will be required before this document can be considered for formal adoption.

In addition to the Joint Transportation Policy, the Consortium has a series of internal operating procedures and forms. Some of the forms, while similar in content and intent, have not been harmonized between the two Member Boards. This results in some inconsistency in treatment of students from the two Boards, and in the operating procedures of the Consortium. Collectively, however, the Joint Transportation Policy and Administrative Regulations manual provide moderately comprehensive guidance and operating parameters for the Consortium.

The following observations are based on the approved documents only, and the additional understanding of operating practices was obtained during onsite interviews with Consortium staff.

Service eligibility

The Joint Transportation Policy describes common transportation standards for both Member Boards. Eligibility is first defined within a general policy statement, then by general category (e.g., home to school; school to school; education field trips), and finally by distance, grade level, and special circumstances. All policies are applicable to both Boards, which is consistent with the intent of the E&E Review. However, the eligibility criteria are inadequately defined by supporting procedures, resulting in a high probability of inconsistent application for each criteria and standard of service.

The wording of the distance-based eligibility criteria is unclear. The policy states that transportation *may* be provided on a distance basis for different grade levels. Each of the grade-based distance policies include the identical wording that eligibility is based on the distance a student resides “from school *or* from an established bus stop/route”. This combination in the use of *may* instead of *shall*, coupled with a distance from school *or* an established bus route results in a confusing statement on transportation eligibility.

Uncertainty is also introduced for the eligibility of grade 7-12 students. Eligibility for these students is further constrained by distance if these students reside in “Urban/Developed Areas”. However, there is no definition provided for what constitutes “Urban/Developed”. Similarly, the policy states that “walking zones shall be established in accordance with the foregoing regulations”, yet interviews with staff indicate that these areas are established by long historical precedent, and do not comply precisely with the distance-based policy. These examples illustrate the importance of clearly defining, through supporting procedures, the interpretation and meaning of an established policy. The E&E Review Team recognizes and acknowledges that some of these issues are being addressed in the draft policy and procedure manual that is currently under review but has not yet been adopted.

Additional uncertainty is introduced in the policy on courtesy and hazard-based transportation. The document includes a section on “Safety Zones” that states in part that “transportation may be provided notwithstanding the distance requirements where particular hazards and/or individual hardships are identified and recommended by the RCJTC”. It does not go on to describe how these criteria will be identified. To illustrate further, while the policies described within the manual are harmonized, the Consortium also utilizes separate forms and procedures for the request for out of boundary or out of zone transportation, and medical related transportation for each Board. There is also a unique form required for sitter/day care arrangements applicable only to RCCDSB

students. The accumulation of these different forms and procedures, coupled with an absence of firm guidance on the application of the harmonized policies, can lead to problems with the equitable application and enforcement of service standards throughout the system.

Exceptions to established service eligibility guidelines

Alternate bus stop locations are allowed under the policy for babysitters, day care centers and/or custodial parents within the pupil's home school attendance zone. A procedure for "special bussing consideration" for high school students allows for a transportation request for work or academic support. Approval is granted on a yearly basis providing that it is on the same home to school bus and to an existing stop. Out of boundary transportation is accommodated for students of both Boards pending the completion of the forms supplied by each of the Boards (see above) and the subsequent approval by the school principals and the Consortium. A form is provided for requesting courtesy transportation which must have the concurrence of the school administrator. RCJTC makes the determination as to the transportation space availability.

Despite these exception-based policies and procedures, there was no documented appeal policy or procedure presented as part of the E&E Review. The policy manual refers to the "Transportation Managers or Departments" for the administration of transportation or for questions related to stop placement. This is an anachronism held over from the recent past when there was a transportation management position in each Member Board. It was reported that the appeal would be made in writing and then investigated and acted on accordingly, but that this is only an informal process.

The uncertainty introduced in the policy statements themselves, as discussed above, coupled with the significant number of allowable exception conditions and the absence of a clear appeal process can result in transportation services being provided to numerous students who are otherwise ineligible by policy.

Unfortunately, the current coding structure for students makes it impractical to easily quantify these implications. This is a subject we return to in the Routing and Technology section.

Transportation planning practices

The policy states that "school bus routes may be shared between Boards and that JK-12 students may be on a single bus where feasible and economically beneficial." Interviews with staff and data analysis indicate that this is a widespread practice that includes the sharing of buses between Boards and also the integration of both regular and special education students on the same bus when feasible. The policy also

addresses stop placement and the use of transfers. It states that “transfers of student shall be directly from one vehicle to another” and that “supervised transfer points on school grounds may also be permitted pending authorization.” Interviews with Consortium staff indicate a concern with the current practices and operator adherence to the bus to bus transfer requirement.

All other transportation planning practices and procedures are informal or undocumented. Of particular note, the policy does not address allowable student ride times or seat loading parameters (except to indicate that the vehicular capacity is not to be exceeded). In general, Consortium staff aim to limit ride times to one hour for all grade levels. For seat loading, staff use planning goals of three per seat for JK/SK to grade 6, and 1.5 per seat for grades 7-12. The assignment of vehicles to runs is based on the weighted load of the bus as determined during the planning process. The monitoring of vehicle assignment and capacity is accomplished using a spreadsheet which is maintained for every vehicle in the combined fleet.

The policy manual does not specifically address the management of bell times or the process for a change of times at the request of a school or the Consortium. There was a Board motion introduced that allows for the Consortium to change the bell times at the schools. This motion would permit the Consortium to monitor arrival and departure times, and to make informed decisions as to bell time adjustments. The motion has not yet been approved. A substantial pilot project to arrange bell time tiers is underway in the current school year and is discussed further in the Routing and Technology section.

Annual planning activities are documented utilizing an Excel spreadsheet. For each activity, a targeted start and finish date is established as well as recording the date on which the activities were completed. Examples of pertinent activities include: updating of current student data, grade rollovers, uploading of pre-registered students, the preparation of routes for testing, and the final allocation and verification of drivers to routes. Since the processes between the Boards are not common, tasks specific to one Board or the other are also identified.

The E&E Review Team recognizes and acknowledges that some of these issues are being addressed in the draft policy and procedure manual that is currently under review but has not yet been adopted.

Route and operator audits

Route and operator audits are not currently included in the Joint Transportation Policy, or in operational practice. Informal route review procedures allow for operator recommendations as part of the route planning process. Dry runs are required at or near regular route times to best determine if timing and route paths are accurate. The target date for sending the information to the operators is by the end of July. In addition,

operators receive, and are required to return by October of each year, a Route Information Form. Attached to the Route Information Form is the original route detail and roster. For each route, the operator updates timing, distance, and roster information which are then used by staff to update and maintain route accuracy in the system.

4.2.2 Best Practices

It is recognized that RCJTC has demonstrated best practices in the following areas:

Policy harmonization

The RCJTC operates under the umbrella of a single, consolidated, and mostly harmonized transportation policy. While several shortcomings exist, and the continued development and adoption of the new policy and procedure manual is recommended, this is consistent with the expectations of the E&E Review Team and represents a best practice.

4.2.3 Recommendations

Modify and adopt the proposed policy and procedure manual

The policy and procedure manual currently under development represents a substantial positive step forward. It incorporates many of the elements that are currently missing, and enhances the clarity of many other elements of the Joint Transportation Policy. Efforts should focus on ensuring consistency between this document and the Joint Transportation Policy, and on ensuring that the new manual addresses all aspects of service eligibility and operations. Serious consideration should be given to redrafting the Joint Transportation Policy to conform to the format of the new manual.

Clarification and expand current policies and procedures

Significant uncertainty exists within the current Joint Transportation Policy as it applies to key elements of service delivery such as the definitions of hazardous conditions and urban/developed areas. In addition, key criteria such as allowable student ride times and courtesy transportation eligibility are missing. An effort should be undertaken to clarify the current policies and expand them to include the missing elements. This effort should be undertaken jointly with the final review and adoption of the new policy and procedure manual.

4.3 Special Needs Transportation

4.3.1 Observations

There are no current policies or procedures that are focused exclusively on special education transportation. This is a particular area of concern as this population of students requires exceptional care and planning to ensure that safe and effective transportation services are provided. The only specific reference to special needs requirements in the Joint Transportation Policy is in section 11B, which makes it the responsibility of the school principals to identify pupils with exceptionalities. The principal is then responsible for informing the bus driver and the “transportation department” of these needs, and to work with the driver to identify “any special precautions required while the pupil is on route”. This is a seriously deficient policy and this overall approach raises significant concerns as to the adequacy of safety and training procedures in the transportation of this fragile population.

Special needs planning procedures and guidelines

Special Education transportation is provided to the RCDSB’s congregated programs and the integrated programs for the RCCDSB. Additional programs include French Immersion, Alternative Learning, and Section 23 Schools. Integration of special needs students on regular bus runs is emphasized, reducing the number of dedicated special needs buses and runs. Special needs planning is divided by Board. One planner is primarily responsible for the assignment of a student's transportation within the RCCDSB. It is a shared responsibility within the RCDSB’s two planners. Consortium staff is provided information (for each student) on specific transportation needs including equipment or other special requirements individually by each Member Board. There is no formal process for the involvement of RCJTC staff in the identification of individual student needs. Coupled with the absence of specific policy and procedural guidelines for the handling of special education students, the lack of a centralized approach to route planning for these students raises significant concerns regarding the safety and effectiveness of this transportation category.

4.3.2 Best Practices

It is recognized that RCJTC has demonstrated best practices in the following areas:

Run integration

RCJTC has made a substantial effort to integrate special education students on regular bus runs.

4.3.3 Recommendations

Develop comprehensive policies and procedures related to special education students

It is strongly recommended that, as part of the policy and procedure manual development process and adoption, the RCJTC develop a comprehensive set of policies and procedures relating to the safe and effective transportation of special education students. Many examples of such policies exist throughout the Province, and the Consortium staff should undertake to adopt and modify examples of best practices from other locations to local conditions and requirements. The emphasis should be placed on documenting responsibilities for identifying individual student needs, and the procedures for ensuring that these needs are met. In addition, these policies and procedures should also include requirements for providing the proper equipment and training for the Consortium, Board, and operator staff that will be responsible for planning and implementing these services.

Centralize the planning of special needs transportation

The Consortium should implement a planning structure that focuses special needs planning responsibilities with a single transportation planner. Requirements for special needs students are unique, and the population transported by the RCJTC is small enough that this responsibility is best administered by a single individual. This recommendation should proceed in conjunction with the development and documentation of clear policies and procedures.

4.4 Safety policy

4.4.1 Observations

While there are no sections of the Joint Transportation Policy that are specifically designated as safety or training policies, most of the requirements are covered under other headings, primarily those related to parent, operator/driver, and principal responsibilities.

Driver Training

Driver training requirements are covered in the Joint Transportation Policy under heading 10 – School Bus Operator’s/Driver’s Responsibilities Regarding Bussing. These requirements include:

- Drivers must meet all licensing training required for certification including a Defensive Driving Course.

- Drivers are responsible for knowing and understanding each of the Consortium's/Board's policies.
- Operators are to provide an annual driver refresher course.
- Each operator is responsible for presenting periodic safety meetings (minimum of 1 per year).

Of particular note for students with special needs, section 10 states that the training “shall include special training for pupils with exceptionalities and allergies”, but is silent as to specifics. However, the current operator contracts contain a comprehensive description of training requirements including:

- Initial Training;
- Sensitivity Awareness for Special Needs Students;
- Awareness of Racial and Ethno cultural issues;
- First Aid, Epi-Pen and CPR;
- Bus evacuation, accident procedures;
- Student Management;
- Lost child, late bus and other procedures; and
- Annual and every three year reviews.

An example of the agenda of the annual meetings was provided to the E&E Review Team along with the attendance sheet used to track driver/operator attendance and the schedule for this school year. Collectively, the documented requirements meet the expectations of the E&E Review, but there have not been any audits to confirm whether the operators are meeting the requirements.

Student training

Under the operator responsibility section, the Joint Transportation Policy states that "operators shall provide a school bus and driver to each school and assist with the expectations and demonstrations of the school bus safety rules for all elementary grade levels, when the principal requests this service." There is no reference, however, to exactly what student training is to be provided by the RCJTC.

In practice, bus tags are provided for all JK/SK students with a new tag provided for a change in transportation. Also, the RCJTC has begun providing the First Rider Program during the first three weeks of October. Transportation staff and operators jointly provide this program to all elementary JK to grade 3 students. First Aid/CPR certification is facilitated by the RCJTC annually for drivers who must be certified every three years. Finally, driver awareness meetings are held by the RCJTC annually by region in September-October.

Use of cameras

Cameras are not currently supplied or required by the Consortium, although the RCDSB Administrative Procedures describes the use of video cameras in schools and school buses. The procedure guides the use of the device and the resulting recordings to ensure that privacy standards are met. The RCCDSB presently does not have a policy or procedure related to camera use on buses.

Emergency, accident and incident procedures

The current policy manual does not directly address the management of bus accidents or incidents, although there is an accident report sheet that needs to be completed in the event of an accident.

4.4.2 Recommendations

Enhance existing safety policies

Enhance the existing safety policies by incorporating audit requirements to ensure that drivers are meeting their training requirements, codifying student training requirements in a policy statement with supporting procedures, standardizing a camera use policy for the RCJTC, and documenting emergency, accident, and incident procedures. This should be conducted as part of the policy and procedure manual development process and adoption.

4.5 Results of E&E Review

Policies and practices have been rated as **Moderate-Low**. The RCJTC operates under the umbrella of a fully harmonized Joint Transportation Policy, but there are significant gaps in the documentation and some uncertainty as to the application of certain guidelines. Of particular note is the absence of an appropriate policy and supporting procedures for the delivery of special needs transportation services.

Recent efforts to develop a well formatted, comprehensive transportation policy and procedure manual are a positive step, but this manual needs to be evaluated for

consistency with the Joint Transportation Policy and must be modified to include critical policy and procedural elements that are currently missing.

5 Routing and Technology

5.1 Introduction

Routing and Technology encompasses the management, administration, and use of technology for the purpose of student transportation management. The following analysis stems from a review of the four key components of:

- Software and Technology Setup and Use;
- Digital Map and Student Database Management;
- System Reporting; and
- Regular and Special Needs Transportation Planning and Routing.

Each component has been analysed based on observations from fact (including interviews) together with an assessment of best practices leading to a set of recommendations. These results are then used to develop an E&E assessment for each component, which is then summarized to determine an E&E assessment of Routing and Technical efficiency as shown below:

Routing and Technology – E&E Rating: Moderate-Low

5.2 Software and technology setup and use

Any large and complex transportation organization requires the use of a modern routing and student data management system to support effective and efficient route planning. Effective route planning not only ensures that services are delivered within established parameters; it also helps to predict and control operational costs. Modern software systems have the ability to integrate and synchronize with student accounting, communications, and productivity software. The integration of these software systems allows for more effective use of staff time and supports timely communication, data analysis and reporting. Web- based communication tools in particular can provide stakeholders with real time and current information regarding their student's transportation including service or weather delays, the cancellation of transportation, or school closings. To derive the greatest benefit from these systems, it is imperative that the implementation include an examination of the desired expectations and outputs of the system to support comprehensive analysis and reporting. This section of the evaluation assesses the acquisition, setup, installation, and management of transportation related software.

5.2.1 Observations

Routing & related software

The RCJTC and its Member Boards have been users of the Edulog routing software product since 2001. The original agreement was signed by representatives from each of the Member Boards, and this continues to be the governing contract for this software license. Updates have been received and incorporated such that the Consortium is using the latest update to the software. Edulog is hosted on a local server within the Consortium offices, and is the primary technology tool used by the Consortium.

Other software and technology tools in use are limited to the Consortium website, office productivity software, and basic email and telephone systems. The Consortium's website provides static information on policies, contact numbers, and school boundaries. The current status of school buses is updated in near real time by the General Manager based on information forwarded from the bus operators. The website is hosted on a RCDSB server. Common office productivity software is used for presentations, correspondence, and data management purposes. These are locally hosted on each computer in the Consortium offices, but supplemented with a local file server as well as access to each Member Board's network. Email and telephone systems are used as the primary access point for users and stakeholders in the transportation system to contact Consortium staff. The email server is hosted by the RCDSB. The telephone system is a simple three-line structure with no queuing or hold system. If all lines are occupied, the caller receives a busy signal. The telephone and fax system is hosted by the RCCDSB.

Maintenance and service agreements

The annual license and maintenance agreement for Edulog provides for the updating of any changed program materials and user guides, assistance by telephone or mail, and the updating of up to 15% of geocode nodes currently in use. Additional technology support is to be provided by the Member Boards, but no formal agreement is currently in place for these services.

System backup and disaster recovery

Maintenance and backup procedures and IT support agreements are currently informal and are provided on a shared basis by each of the Member Boards. Currently, the RCJTC server (local to RCJTC office) and the Web server are both backed up daily onto a tape drive by RCDSB staff. A major back-up of all systems, including those of the RCJTC is performed on a monthly basis. No documented disaster recovery protocols have been adopted, although one is in draft form in the new policy and procedure manual currently under development. No protocols or plans exist for a major disaster

recovery whereby the Consortium offices are lost or cannot be occupied for an extended period.

Staff training

Initial training for new staff members and progressive training for all staff is provided primarily by an existing senior staff member (the Auxiliary Services Supervisor). Formal training from Edulog on system use has not been provided since the initial system implementation in 2001. To assist staff with the use of Edulog, internal "User Manuals" or guides have been developed to provide a ready reference for staff as they work within the system. Examples of the instructions in this document include:

- Edulog basics;
- An overview of Edulog help;
- Edulog troubleshooting notes;
- Preparing of route sheets; and
- Transportation basics.

Recently, Consortium staff have begun attending monthly training webinars provided by Edulog, and the Supervisor has joined the Edulog users group for the region. However, no formal training plan, tailored to the specific needs of each staff member, is currently in place.

5.2.2 Recommendations

Develop a suite of supporting software and technology tools

Edulog is a planning tool designed for the internal use of Consortium staff in developing and maintaining an efficient and effective route structure. The ability of the Consortium to communicate effectively with users, operators, administrators, and its Member Boards is constrained by the absence of readily available technologies. Examples of the tools that should be considered for near-term incorporation into Consortium operations include: web-based distribution of route information to users and operators; and enhanced telephone systems to manage and distribute incoming and outgoing calls.

Execute service agreements and disaster recovery protocols

It is recommended that the Consortium immediately develop a system backup and disaster recovery protocol to ensure continuity of operations. This should then be

incorporated into a formal agreement with each Member Board that documents each organization's precise responsibilities and the level of service to be provided.

Develop a formal training program for Consortium staff

It is recommended that the Consortium implement an enhanced, regular program of training for Consortium staff. At a minimum, this should include a monthly in-service training program that targets the relative level of expertise of individual staff. This training should not be limited to the routing software, but should include all aspects of student transportation route planning and operations. Most of these sessions can tap the expertise that currently exists throughout the organization, but some sessions should bring in outside sources such as representatives from the bus operators association, business officials from the Member Boards, Ministry representatives, and other industry experts.

5.3 Digital map and student database management

An accurate digital map is paramount to support effective route planning and also the effectiveness of the staff and the efficient use of the fleet. This aspect of the E&E Review was designed to evaluate the processes and procedures in place to update and maintain the map and student data that forms the foundation of any student transportation routing system.

5.3.1 Observations

Digital map

The digital map currently in use was supplied by Edulog with the original installation of the program. Since that time, all map maintenance and updates have been entered manually. There has been no map data updates since the original underlying map data was provided.

Map accuracy

The maintenance of the common map is assigned to the Auxiliary Services Supervisor. This includes the manual addition of street segments for new development and the setting of key attributes such as road speeds. Two additional staff members are also provided with limited access to the map data. To enhance skills and to potentially improve the accuracy of map data, the Auxiliary Services Supervisor is beginning to attend the Ottawa Valley GIS users group. However, the current utility and accuracy of the map is the result of years of manual updates and refinements to the base data received from Edulog.

The Consortium achieves a high level of accuracy, with nearly 100 percent of students in the system successfully matched to the electronic map. A review of the data at the time of the E&E Review indicated that only a small number (less than 1 percent) are currently not located on the map. This is consistent with the expectations of the E&E Review Process.

Default values

Default values such as road speeds, closures and directions have been calibrated over time as information becomes available through operator route updates and the experience of long-tenured staff. The cumulative effect of these changes and updates is a map that is reported to be highly accurate and complete.

Boundaries established on the map include school attendance, walk zones, and special (hazardous) conditions. The current hazardous boundaries are historic and may not accurately reflect current conditions. Additionally, not all hazardous areas are accurately posted and students are not correctly coded within those areas. Some street segments are designated as "no travel". There are no other exception boundaries or other means utilized to identify exceptions on the map other than these historical hazard area boundaries.

Student data management

One student database is maintained within Edulog containing all students from both Member Boards. A significant portion of staff time is devoted to the update and maintenance of the student data, as periodic downloads and updates from the Member Board data systems are not routine. This is a significant problem, as staff time will need to be redirected if the recommendations resulting from this E&E Report are to receive the appropriate amount of resource allocation.

Currently, the process for obtaining student data is different for each Board. For RCDSB students, data is available to the Consortium as an extract from the student information system (Trillium). However, uploads are neither automated nor routine, and require the assistance of both Consortium and IT staff.

They are conducted on a periodic basis, reported to be three to four times annually. This periodicity is not useful for the daily route maintenance activities of staff, but is helpful for the annual planning process.

For RCCDSB students, data is extracted out of the Maplewood student information system as an Excel spreadsheet for manual verification by staff against the data in the Edulog student database. There is no electronic data transfer of this data into Edulog. Data is received approximately every three months and is processed to ensure that

addressing and student information is consistent between the Consortium's Edulog database and the data within each of the Board's student information systems. As the process is not automated or timely, the Consortium relies on the information supplied to it daily by each of the schools. This information arrives in numerous forms of paper, email, and faxes. The data received from the Member Boards is only used to provide a periodic reconciliation.

Coding structures

Routing software not only supports effective route planning but, when properly integrated with student information systems, provides accurate data through which performance can be analyzed and reports generated. A well thought out and implemented coding structure is paramount as it allows for the extraction of data within specific service areas. The data provides route planners and Consortium management accurate information on which to base operational and strategic decisions.

In addition to the Edulog default eligibility codes, the Consortium has developed an extensive array of over 200 user defined codes primarily to facilitate reporting to the Ministry of Education. This approach illustrates the importance of balancing the need for detailed information with a manageable coding structure. An analysis of student data reveals that, while there are an extensive number of codes, assignment of these codes to student records is overly complex. A small minority of the available user- defined eligibility codes are actually utilized, and only a small minority of students actually receive one of the available user-defined eligibility codes. As a result, any analysis becomes less meaningful and the coding structure does not provide an accurate reflection of actual student status.

Overall, the data indicates 15,657 total student records are maintained in the Edulog system. Of these, 10,765 (69 percent) are marked as eligible for transportation, 3,543 (22 percent) as ineligible – within walk zone for school, and 1,337 (9 percent) as ineligible – outside attendance boundary for school. Just 11 records (less than one-tenth of one percent) are marked as eligible on a courtesy basis, and none are marked as eligible due to hazardous walking conditions. This is based on the top level eligibility codes automatically assigned by Edulog based on a combination of student location and school assignment. A more in-depth understanding should be gained in an examination of the 200 plus user-defined codes and the six travel codes also assigned to student records. These permit the planners to override the automatically assigned codes when special conditions exist.

The User Eligibility codes provide for a finer definition of eligibility based on user-defined criteria. For example, the 69 percent of students who are eligible for transportation can be further defined by any number of other categories that the Consortium or Member

Boards feel is valuable for analytical or reporting reasons. With over 200 active codes, however, this task becomes largely unmanageable. A smaller number of targeted codes and better use of the main eligibility codes within Edulog would provide a more robust, hierarchical understanding of student status.

To illustrate, only 3,596 of 15,657 records (23 percent) have any user-defined eligibility code assigned. These 3,596 records are divided among 90 of the more than 200 available codes. Therefore, a substantial majority of the available codes are not being utilized at all. For those that are, there are 157 combinations of Eligibility and User Eligibility codes in use. The single largest combination (553 records, or 3.5 percent of all students) have a combination of “Eligible” and “Transported in-zone Sitter”. In other words, the only unique condition for these students is that they are transported to an alternate address from their residence, but this address is still within the attendance zone for the school. One hundred and fifty coding combinations (96 percent of the total) each have less than one percent of the student population assigned. While theoretically useful for reporting purposes, this coding structure provides little to no analytical benefit. Key subsets of students, such as those transported on a courtesy basis or those transported due to hazardous walking conditions, are simply not easily identifiable in the current structure.

Travel codes provide another secondary structure that permits further definition of a student’s status within the first level eligibility code. The Consortium has defined a total of six. A travel code of “W”, for example, reflects a student that walks to school. Thus, a student who is otherwise eligible for transportation that chooses to walk should have an eligibility code of “0” and a travel code of “W”. This provides yet another mechanism for defining the status of each student, and can be used in combination with the user-defined eligibility codes to design a clear, hierarchical, and meaningful student coding structure.

Special needs coding is similarly unclear. The binary special needs flag is utilized together with two of the travel codes (“S” – special transportation; “W” – wheelchair), several specialty equipment codes, and a text-based “transportation comment” field to provide the required information. The analysis indicates many inconsistencies in the application of these various codes such that it becomes unclear exactly how many special needs students are transported and what are their individual requirements.

Routes and runs are effectively coded using the basic syntax of the Edulog system. Individual bus runs receive a three digit prefix indicating the school serviced, and a three digit suffix indicating the sequence of runs serving this location. Runs that service transfer points receive an appropriate prefix. The only shortcoming here is that the run identifier does not clearly indicate whether the run services more than one school location. This information is obtainable; however, only by examining the run numbering

in combination with the stops serviced on the run, as the stops also identify the school serviced.

5.3.2 Recommendations

Redesign the student coding structure

As part of the implementation of this recommendation, the Consortium should:

- Set-up the Edulog system, including map boundaries and settings, to correctly utilize the automatically assigned eligibility codes, in particular for the identification of hazardous conditions;
- Greatly simplify the set of user-defined codes such that they serve as correct modifiers to the base eligibility codes, such as a small set of codes that clearly identify courtesy riders and those provided with transportation through Board directed action;
- Redesign the use of the travel codes to serve as an effective third level code to define the type of transportation service provided; and
- More fully utilize the available special needs coding to reflect when special equipment or services are provided to a transported student.

5.4 System reporting

A key benefit of modern routing software is the ability to quickly gather, collate and analyze large data sets. These data sets can then be used to communicate a wide variety of operational and administrative performance indicators to all stakeholders. Actively using transportation data to identify trends that may negatively impact either costs or service and the subsequent communication of both expectations and performance is a key component of a continuous improvement model. This section will review and evaluate how data is used to evaluate and communicate performance and assess organizational competencies in maximizing the use of data retained in the routing software and related systems.

5.4.1 Observations

Reporting and data analysis

The only regular reporting initiated by the Consortium is in response to the annual Ministry of Education requirements. The Consortium utilizes this information to identify basic statistical information on the system. There is no program of internal reporting to

the Consortium's governance structures, Member Boards, or users of the system. There is no regular program of performance measure (KPIs) or regular use of data for analytical purposes.

Edulog data is exported to spreadsheets periodically for internal operational uses by Consortium staff, and for use in developing certain tracking mechanisms. An example of this is a comprehensive spreadsheet summarizing bus information by operator including: make, model, year, capacity and AM and PM route mileages. This workbook is also used to track available capacity, weighted load, and utilization. In another example, data is also compiled to facilitate payments to taxi and bus operators as well as parents. Other than these internal uses, Edulog queries are regularly utilized to identify information within the system in support of day-to-day activities.

5.4.2 Recommendations

Establish a documented reporting, data distribution, and performance indicator tracking process

It is recommended that the Consortium establish a regular schedule of data extraction and analysis to evaluate current system effectiveness and alternative routing options. This should include a defined set of reports for each position in the organization, and for the Consortium's governance structures. It is further recommended that the Consortium develop a comprehensive set of Key Performance Indicators that are customized to the needs of the Consortium and its Member Boards. These indicators should reflect those elements that define efficient and effective operations, but also those that are of particular interest to the Consortium. The list should be kept to a manageable number, but all indicators should be regularly tracked to facilitate long-term trend analysis. Examples of measures to consider for inclusion are discussed at length in the analysis of system effectiveness section of this report.

5.5 Regular and special needs transportation planning and routing

Effective route planning is a key function of any high performing transportation operation. This section of the report evaluates the processes, strategies, and procedures that are used to maximise the use of the fleet, control costs while delivering a high level of service to students using each mode of transportation.

5.5.1 Observations

Management of bus routes

Issues with system setup and student data management consume the majority of staff time. Organizational concerns related to the recent consolidation of staff in a single office, and the long-standing split of responsibilities between RCDSB and RCCDSB staff, lead to significant disparities in skill levels and approach to this important function. In short, the Consortium staff, while displaying a high level of cooperation and team spirit, are not yet working in a coordinated way on developing an integrated, smoothly operating route planning function. This limits the ability of the Consortium to focus its attention on achieving greater levels of effectiveness and efficiency throughout the transportation system.

The Edulog routing software is not currently being utilized as an effective tool for either the analysis of routing efficiency or to model potential changes in routing policies or approach. Examples were provided by the Consortium of past reviews of the route architecture to improve planning; most recently, the implementation of a substantial staggered bell time pilot project. These efforts relied on a combination of base data from the routing software, staff observations, recorded notes, Excel data, and outside resources. These optimization efforts were accomplished by teams formed within the Consortium to look at specific geographic areas, but do not constitute the type of regular analysis that is the expectation of the E&E Review.

Route changes primarily result from student additions, changes, or deletions over the course of regular operations. During the school year, Consortium staff generally maintain the routes based on information provided via fax, email, or telephone from schools or directly from parent calls. Driver information is incorporated via a submission due by September 30th each year. The drivers complete a pre-printed form and note all route changes based on actual loads, actual times and distances. The assignment of specific vehicles to runs and routes is based on the weighted load of the bus as determined during the planning process. The monitoring of vehicle assignment and capacity is accomplished using a comprehensive spreadsheet outside of the routing software.

While there are no specific policies that guide planning for special needs students, interviews indicate that an effort is made to accommodate the needs of the students while at the same time trying to maximize the use of the fleet. According to the interviews, special needs students are fully integrated onto regular routes and between Boards within the constraints set by medical or other specific needs of the students.

Analysis of system effectiveness⁸

The RCJTC provides transportation services to approximately 11,000 students attending 60 schools and programs on nearly 700 morning and afternoon bus runs. The Consortium widely utilizes combination runs, and a limited number of transfer runs throughout the system. A substantial pilot project to create bell time staggers (tiers) is having a significant positive impact on overall efficiency. There is a long standing recognition that sharing resources among the Member Boards is a critical component of cost control.

Analysis of the runs indicates that 53 percent are integrated with students from both Boards. Both special needs mainstreaming and regular education integration on special needs buses is used where possible. Integration of students from both Boards, all grade levels, and service to multiple schools on individual bus runs is a key element in the results achieved. Further implementation of staggered bell times will yield further efficiencies in the future.

As mentioned, the system has placed a reliance on run integration and the use of combination runs to achieve efficiency. Table 4 breaks down the morning run set by the number of schools serviced on the run. Sixty percent of all runs provide service to more than one school, with nearly thirty percent serving three or more locations.

Table 4: Morning run distribution

Count of Schools Serviced	Number of Bus Runs	Percent of Total Runs
1	136	40%
2	102	30%
3	47	14%
4 or more	54	16%

This approach to routing facilitates achieving relatively high levels of capacity utilization on individual bus runs, even when the population of transported students is geographically dispersed. Table 5 describes the average of simple capacity utilization on each bus run in the system operated by buses with a capacity of 48 passengers or

⁸ All data reported in this section of the report refers to data collected while the E&E team was on site. There may be inconsistencies with some previously reported Ministry data due to the different timing of the data collection.

more, and a system-wide average. These calculations are based on the rated capacity of the bus as entered in the Edulog system. When seat loading parameters are considered, the percent capacity utilization would increase as fewer seats are considered to be available for the higher grade levels.

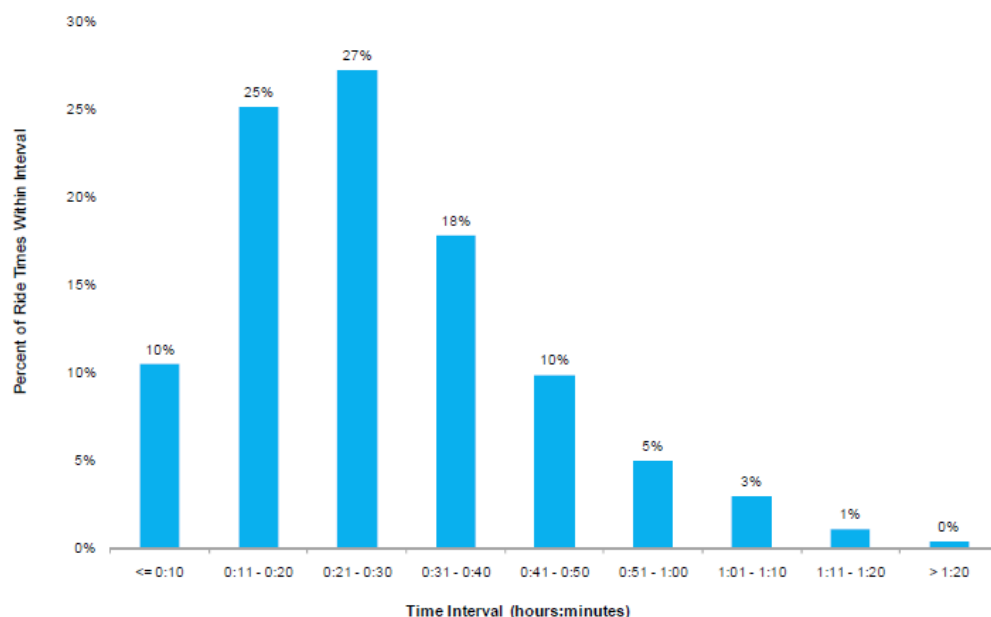
Table 5: Capacity Utilization

Bus Capacity	Number of Bus Runs	Average Capacity Utilization
48	16	46%
54	6	55%
66	14	65%
72	420	65%
System-wide	689	58%

The vast majority of bus runs are operated using 72 passenger capacity vehicles. These units achieve an average capacity utilization of 65 percent. Again, actual capacity utilization on a planned basis is higher, since these results do not consider the effect of seat loading parameters that effectively reduce the rated capacity of the vehicle for planning and service level purposes.

Another key measure of service effectiveness is student ride times. Figure 7 displays the results of an analysis of student ride times in the morning. As can be seen from the chart, 81 percent of students have ride times less than 40 minutes in length. The analysis also indicates that 511 students (4.6 percent) have ride times greater than the informal service parameter of 60 minutes. It should be noted that these numbers are adjusted to be inclusive of transfers used throughout the system.

Figure 7: Student Ride Times



A substantial pilot program to create bell time staggers was implemented this year, just before the E&E Review Team's site visit. The effect on the system is dramatic, with a substantial increase to the number of bus runs operated by each bus during the service day. Prior to the pilot, the system was primarily on a single time tier, with each bus operating a single morning and afternoon run. Since the goal of any system should be both to fill the bus but also to reuse the bus as many times as possible, the system was not providing sufficient emphasis to this important element of overall efficiency. With the pilot program, the count of runs per bus increases, and the number of buses required to transport 100 students decreases substantially. Buses per 100 students is a combination measure that considers both capacity utilization (discussed above) together with asset utilization (runs per bus). Table 6 summarizes these results.

Table 6: Pilot program changes

Category of Schools	Students Transported	Daily Runs per Bus	Buses per 100 Students
Staggered Bell Time Pilot	5,086	3.20	1.40
Non-Pilot	5,924	2.25	3.46
Combined System	11,010	2.50	2.51

These results are achieved primarily at the expense of longer route times for the buses involved in the pilot. Morning route times (a combination of all morning runs plus deadhead time) for the pilot program buses is 1:23. For the non-pilot program buses this is 0:46. While additional time on the road translates into additional cost of operation, this is typically overwhelmed by the savings associated with removing buses from the system. Given that there is more than a 50 percent reduction in the number of buses required to transport 100 students between the pilot and non-pilot areas, a tremendous opportunity exists to reduce the number of buses required to operate the system.

5.5.2 Recommendations

Reorganize staff in line with the consolidation of the Consortium's office space

It is recommended that the Consortium reorganize its staff to take advantage of the consolidation in a common office space. These efforts should be coupled with retraining and the student data management process changes recommended earlier. The Consortium should also establish one position that is to be responsible primarily for system administration, data management, reporting and analysis; and another position

that is primarily responsible for special needs transportation. In addition, it is recommended that the Consortium's departmental organization be split based on geography, not Board affiliation, with two regular route planners being held responsible for each area.

Implement the staggered-bell approach on a system-wide basis

The Consortium should strongly consider expanding and continuing efforts to develop a staggered bell routing approach system-wide. Results from the pilot project are compelling, and are strongly suggestive of the benefits of a comprehensive approach to bell time coordination throughout the Member Boards.

5.6 Results of E&E Review

Routing and Technology use has been rated as **Moderate-Low**. Significant deficiencies exist in the setup and use of the available technology, data management processes, and staff organization. These are compensated somewhat by results apparent in the analysis of system effectiveness, which indicate significant recent improvements in bus and bus capacity utilization. Recent progress in the areas of policies and practices in addition to the staggered bell time pilot project provides an excellent base from which to build. Prompt attention to the organization and its internal processes will yield fast improvement.

6 Contracts

6.1 Introduction

The Contracts section refers to the processes and practices by which the Consortium enters into and manages its transportation and other service contracts. The analysis stems from a review of the following three key components of Contracting Practices:

- Contract structure;
- Contract negotiations; and
- Contract management.

Each component has been analyzed based on observations from information provided by the Consortium, including information provided during interviews. The analysis included an assessment of areas requiring improvement that were informed by a set of known best practices identified during previous E&E Reviews. These results are then used to develop an E&E assessment for each component. The E&E assessment of contracting practices for the Consortium is as follows:

Contracts – E&E Rating: Moderate-Low

6.2 Contract Structure

An effective contract⁹ establishes a clear point of reference that defines the roles, requirements, and expectations of each party involved and details the compensation for providing the designated service. Effective contracts also provide penalties for failure to meet established service parameters and may provide incentives for exceeding service requirements. Contract analysis includes a review of the clauses contained in the contract to ensure that the terms are clearly articulated, and a review of the fee structure is conducted to enable comparison of its components to best practice.

⁹ The word Contract in this context refers to detailed documents outlining the scope of services, rates and expected service levels. The phrase Purchase of Service agreement is used in this report to describe a less detailed document that only outlines the services to be provided and the rates at which they are to be provided.

6.2.1 Observations

Bus operator contract clauses

The Consortium has standardized contracts in place with all of its bus operators. The current year's contract was executed on July 20th and is valid until June 30th, 2010. The E&E Review Team noted that three out of the Consortium's 20 operators had provided written notice that they were signing the contracts under duress. The Consortium bus operator contract does not include a clause that allows it to be automatically extended by mutual agreement. Noteworthy clauses in the bus operator contract outlines, among other things:

- Training requirements, such as first-aid/CPR/EpiPen training for drivers.
 - Driver safety training programs are currently provided by operators and are usually provided soon after drivers begin working. Driver training includes topics such as student management, driving skills training, and first-aid/CPR/EpiPen training.
 - The Consortium does not require drivers to have EpiPen training prior to the first day of operating a vehicle with students onboard;
- Information submission requirements such as driver criminal record and licensing information; operator insurance coverage;
- A detailed set of performance expectations of both drivers and operators;
- Vehicle age requirements. The maximum allowable age is 12 years for all types of buses;
- A mandatory vehicle spare ratio of 10%;
- Requirements for conducting test runs prior to the start of the school year;
- Compensation amounts and structure; and
- Other terms related to dispute resolution, termination and confidentiality.

The bus operator contract does not specify a methodology to be used to re-allocate routes among bus operators. Discussions with bus operators and Consortium management indicated that these allocations are made based primarily on historic allocations and occupancy rates.

Bus operator compensation

The bus operator compensation formula is comprised of a fixed and variable component. The fixed component - the daily base rate per route - includes bus cost, training cost, driver wage, administration and other fixed cost items. The daily rate is adjusted for the following factors:

- Vehicle age – bus operators currently receive an increased daily rate for operating vehicles below 12 years of age. Discussions with Consortium management indicated that this component has been introduced on an interim basis to facilitate the operator's transition to newer vehicles;
- Vehicle size; and
- Decreases in the number of routes allocated to the bus operator.

Bus operators receive the entirety of the daily base rate during inclement weather days. The daily base rate is also paid in full in the event of Board or bus operator cancellation of transportation.

The variable rate is primarily intended to compensate operators for fuel costs and is paid out based on the size of the vehicle being operated. The contract includes a fuel escalation/de-escalation clause.

The total daily rate is determined by multiplying the variable rate by the number of kilometres travelled, then adding the operators' daily base rate.

Taxi operator contracts

The Consortium does currently utilize the services of taxi operators. Taxis are primarily used to transport special education students upon the recommendation of either Member Boards' special education department. While a draft taxi contract has been developed, this contract has not yet received approval from the Consortium's governance structures and, as such, the Consortium does not currently have a formal contract in place with any of its taxi operators. Taxi operator services are procured through a tender process – the Consortium asks for bids from at least three randomly selected operators and awards the contract to the lowest bidder. The Consortium does not specify any performance or training requirements for taxi operators.

Parent drivers

Parent drivers are currently utilized by the Consortium and are primarily used to transport special education students upon the recommendation of either Member

Boards' special education department. The Consortium does not currently have contracts in place with any of its parent drivers.

6.2.2 Best Practices

It is recognized that the Consortium has demonstrated best practice in the following areas:

Insurance

The Consortium requires operators to provide proof of insurance prior to the start of the school year. This ensures that this important safeguard is met prior to providing any services.

6.2.3 Recommendations

Include additional clauses in the bus operator contract

It is recommended that bus operators be mandated to provide EpiPen training to drivers prior to their first day of operating a bus with students onboard, in line with best practices in the sector and to ensure that drivers are qualified to manage potentially life threatening emergency situations from the first day of their interactions with students.

Modify the formula used to allocate bus routes

The Consortium allocates routes among operators based primarily on historic allocations and occupancy rates. While it is important to ensure some equity in route allocation among operators, it is equally important to ensure that the Consortium is receiving the best service possible at the rates being paid. As such, it is recommended that the Consortium modify its route allocation methodology to ensure that route allocations are made based primarily on operator performance (including price and service levels as factors).

Execute a contract with all taxi operators

Written contracts should be established with taxi companies. The lack of contract documentation for these operators increases risk exposure to the Consortium and the Member Boards. This contract should include the same level of detail as the contract used for bus operators in order to ensure the same level of service and safety is provided to those students transported by taxi versus bus and to ensure the same level of risk mitigation for the Consortium. It is important that all vehicles used to transport students are in compliance with the Ministry of Transportation license, insurance and safety requirements, and that drivers have received all appropriate training that is

mandatory to provide student transportation services. As taxis are used primarily for the transportation of special education students it is especially important for the Consortium to ensure that taxi drivers and operators have the appropriate training and safety equipment to accommodate these special requirements.

Establish contracts with all parent drivers

Written contracts should be established with all parent drivers as the lack of contract documentation for these paid service providers increases risk exposure to the Consortium and the Member Boards. This contract should include the same level of detail as the contract used for bus operators, particularly with respect to clauses related to safety, insurance, compliance, indemnity, liability and dispute resolution.

Re-assess the operator compensation formula

The current operator compensation formula indicates that operators will receive the full daily rate per route in the event of an operator labour dispute even though operators would not be providing services during these periods. It is therefore recommended that the Consortium re-assess its compensation formula in this respect to ensure that bus operators are not being compensated during periods when they are not providing transportation services.

6.3 Goods and Services Procurement

Procurement processes are intended to provide an avenue by which the Consortium, as a purchaser of services, can ultimately obtain the best value for money. The goal of the Consortium is to obtain high quality service at fair market prices.

6.3.1 Observations

Operator service procurement

The bus operators in Renfrew County have formed an informal association to negotiate contracts with the Consortium. The operators association is not a legal entity and exists exclusively to negotiate the annual bus operator contract. Membership in the association is limited to bus operators that provide services to the Consortium and the association elects a group of four operators to represent them during negotiations. Issues brought up during negotiations are communicated back to the association for discussion and resolution. Proposals developed by the association are then brought forward during negotiations.

The Consortium is represented during contract negotiations by the Administrative Team, the two co-chairs of the Governance Committee, the Consortium's General Manager,

and the Manager of Plant at the RCCDSB. Negotiations usually take place on an annual basis over a 3-4 month period and the Consortium has imposed an informal deadline of July 31st for all negotiations. Discussions with Consortium management and bus operators indicated that a contract is usually in place before the beginning of the school year; however, the Consortium does not currently have a documented, governance approved procurement calendar that sets formal deadlines for all procurement/negotiations.

Special needs transportation

The Consortium has indicated that it attempts to procure special needs transportation services through the same process used to procure regular home-to-school transportation services. When this is not possible, the Consortium procures specially equipped non-chrome yellow buses that are operated by local municipalities. There is currently no contract in place with local municipalities that outline the conditions under which these services are to be provided.

6.3.2 Recommendations

Develop plans for the implementation of competitive procurement for bus operator services

Contracts for school bus transportation services are currently not competitively awarded. By not engaging in a competitive process, the Consortium will not know whether it is paying best rates for services provided. If a competitive process is used to procure contracted services, the Consortium can clearly state all service requirements in the procurement document. In addition, the Consortium can be sure that it will obtain the best value for its money as operators will compete to provide the required service levels. The use of competitive procurement may not mean that rates will decline; however, the concern for the Consortium should be to obtain best value for money expended.

A competitive process can be used with certain safeguards in place to protect the standards of service. The Consortium should continue to enforce limits placed on the amount of business any one operator can hold to avoid a monopoly situation. Additionally, in evaluating the successful proponents, cost should not be the overriding factor as that will encourage low cost proponents to enter the market while not necessarily ensuring that the same or improved levels of service are being provided. Local market conditions should be considered at all points in the development and evaluation of any service proposal. For example, local operators can be encouraged to participate in this process by placing a value on having local experience as part of the

evaluation criteria; however, this specific criterion for local experience should also not be an overriding factor in the proposal evaluation process.

If the current negotiation process is deemed to be the most appropriate for particular areas - such as remote areas where there may not be many operators interested in providing the service - the Consortium will be able to use the competitively procured contracts as a proxy for service levels and costs negotiated with the more remote operators. Established procurement policies should determine the process for service acquisition in these situations.

As the *Contracting Practices Resource Package* has been released, the Consortium should start developing an implementation plan for competitive procurement. A plan should include a review of existing procurement policies, an analysis of the local supplier market, strategies to help determine the RFP scope and processes and a criteria and timeline to phase-in competitive procurement. The plan should also utilize the best practices and lessons learned that are available from the pilot Consortia.

Review the contract procurement process

The E&E Review Team noted that three out of the Consortium's twenty bus operators had indicated that they were signing their contracts under duress. While the above recommendation regarding competitive procurement will address this issue, the Consortium still requires an interim measure that can be used to ensure satisfactory negotiations while it is laying the groundwork for the full implementation of competitive procurement. As such, it is recommended that the Consortium review its negotiations process, including the membership of negotiations team, to ensure that the contracts resulting from the negotiations are agreed upon by all operators.

Develop and communicate a procurement calendar

It is recognized that the Consortium currently has an informal deadline by which bus operator negotiations are to be completed; however, this calendar does not set a timeline over which the Consortium must procure operator services. It is recommended that, in addition to a deadline, the Consortium develop a planning calendar that includes key dates, milestones and responsibilities related to the procurement of all operator services. The Consortium should then communicate this procurement calendar to all of its operators so as to facilitate the operator's annual planning process.

Address real and perceived conflict of interest situations in the Consortium's procurement policies

In order to increase the clarity and openness of the decision making and procurement process, and to bring the Consortium's practices in line with the Ministry of Finance

Supply Chain Guideline for the broader public sector, it is recommended that the Consortium develop thorough policies and procedures related to the management of real and perceived conflicts of interest. The development of these policies and procedures should form part of the implementation of the recommendation related to the development procurement policies. In particular, the policy should require the Consortium to declare all real and perceived conflicts of interest in writing and should mandate the thorough documentation and release of all relevant steps taken by the Consortium's governance structures, each Member Board and their respective legal counsels. This will become particularly relevant when the Consortium moves forward with the implementation of a competitive procurement process.

Execute a contract with municipal special education transportation service providers

The Consortium currently procures specially equipped non-chrome yellow buses that are operated by local municipalities. Written contracts should be established with these local municipalities as the lack of contract documentation for these municipal operators increases risk exposure to the Consortium and the Member Boards. This contract should include the same level of detail as the contract used for bus operators.

6.4 Contract Management

Contracting practices do not end after a contract is signed. Ongoing monitoring of compliance and performance of contracted service is an important and valuable practice to enhance service levels and ensure that contractors are providing the level of service that was previously agreed upon. Effective contract management practices focus on four key areas:

- Administrative contract compliance to ensure that operators meet the requirements set out in the contract;
- Operator facility and maintenance audits to ensure that operators keep their facilities and vehicles in line with the standards outlined in the contract;
- Service and safety monitoring to ensure that the on the road performance of drivers and operators reflects the expectations set out in the contract; and
- Performance monitoring to track the overall performance of operators over time.

6.4.1 Observations

Bus operator administrative contract compliance

The Consortium collects information required from bus operators during the annual start up process. Information collected and reviewed includes, among other things, an operator information sheet; operator insurance certificate; legal compliance declaration; driver confidentiality agreement; driver training manual; driver first aid/EpiPen training information along with expiry dates; and route information. The Consortium has also obtained a declaration from drivers that allow it to collect their driver's license information; however, copies of driver's licenses are not currently collected by the Consortium. Operators are also required to complete a route information sheet that states the driver allocation and vehicle information. The task of reviewing this compliance information has been delegated to the Consortium's Route Planner.

First aid/CPR/EpiPen training is currently provided by the operators, who also provide an annual refresh for new hires.

Facility, maintenance, safety and service performance monitoring

The Consortium does not currently have a formal, documented process in place to ensure that the performance of operator's on-the-road is in line with expectations and requirements outlined in the contracts.

6.4.2 Best Practices

It is recognized that the Consortium has demonstrated best practice in the following areas:

Operator contract and legal compliance

The Consortium ensures that the information requirements outlined in the operator contracts are submitted and verified in a timely manner. Such efforts to ensure operator contract and legal compliance help the Consortium to measure whether the operators are complying with stated contract clauses and, ultimately, if they are providing safe and reliable service. Evidence that such checks are undertaken and any discrepancies are followed up should be maintained by the Consortium. It is also suggested that the Consortium track the performance of its operators with respect to compliance over time.

6.4.3 Recommendations

Implement a random facility, maintenance, safety and service performance monitoring process

An operator auditing system should be implemented by the Consortium to monitor the performance of its operators. One option available to the Consortium could involve Consortium staff visiting operator's facilities and riding on selected buses to monitor compliance with contractual requirements such as adherence to the stated bus route, no unauthorized pickup or drop off points, and proper use of the student list. This operator auditing process will also provide the Consortium with a basis to determine the accuracy of the student numbers that the bus operators report on the annual October 31 count of students.

Operator audits should be conducted on a random but regular basis and should be supported with appropriate documentation summarizing the results. Operator audits should also be supported by an appropriate policy or procedural framework that outlines the procedure to be used, the frequency of monitoring, and the follow-up activities required of the Consortium. This type of follow-up reporting can aid in the evaluation of operators and be used as evidence of proper implementation of the stated monitoring policies. Efforts should be made to obtain a broad and representative sample of audit results which represent all of the operators that serve the Consortium. The results of these audits should be tracked over time by the Consortium and communicated back to the operators to assist them in managing their drivers, facilities and improving overall service quality.

6.5 Results of E&E Review

The process by which the Consortium negotiates, structures, and manages its contracts for transportation services has been assessed as **Moderate-Low**. Positive elements include generally complete bus operator contracts and administrative contract compliance procedures, although modifications to both of these elements are recommended.

Significant changes are required in order to increase the clarity and effectiveness of the Consortium's contracting practices. The primary areas for improvement include the execution of contracts with the Consortium's taxi, parent and municipal service providers, since the lack of such contracts exposes the Consortium to future risks. The Consortium should also develop policies and procedures for managing real and perceived conflict of interest situations; the implementation of such policies will become particularly critical as the Consortium moves forward with the competitive procurement of operator services, which is also recommended. Lastly, the Consortium should

implement a thorough, documented operator monitoring process in order to ensure that operator performance is in-line with the Consortium's expectations.

7 Funding Adjustment

The Ministry has asked the E&E Review Team to apply their Funding Adjustment Formula to each Board that was subject to an E&E Review in Phase 3. Note that where Boards are incurring transportation expenses in multiple Consortium sites, the Board's adjustment will be prorated for the portion attributed to the consortium under review. For example, if 90% of Board A's expenditures are attributed to consortium A, and 10% of expenditures are attributed to consortium B, the funding adjustment resulting from consortium A's review will be applied to 90% of Board A's deficit or surplus position.

The Ministry's funding formula is as follows:

Table 7: Funding Adjustment Formula

Overall Rating	Effect on deficit Board ¹⁰	Effect on surplus Board ¹⁰
High	Reduce the gap by 100% (i.e. eliminate the gap)	No in-year funding impact; out-year changes are to be determined
Moderate-High	Reduce the gap by 90%	Same as above
Moderate	Reduce the gap by 60%	Same as above
Moderate-Low	Reduce the gap by 30%	Same as above
Low	Reduce the gap by 0%	Same as above

Based on the Ministry's funding formula, in conjunction with our E&E assessment of the Consortium, it is anticipated that the following funding adjustments will be made for each Board:

¹⁰ This refers to Boards that have a deficit/surplus on student transportation

Renfrew County District School Board

Item	Value
2008/2009 Transportation Surplus (Deficit)	(\$739,083)
% of Surplus (Deficit) attributed to the Consortium (rounded)	100%
Revised amount to be assessed under the Consortium	(\$739,083)
E&E Rating	Moderate-Low
Funding Adjustment based on Ministry's Funding Adjustment Formula	30%
Total Funding adjustment	\$221,725

Renfrew County Catholic District School Board

Item	Value
2008/2009 Transportation Surplus (Deficit)	(\$39,688)
% of Surplus (Deficit) attributed to the Consortium (rounded)	100%
Revised amount to be assessed under the Consortium	(\$39,688)
E&E Rating	Moderate-Low
Funding Adjustment based on Ministry's Funding Adjustment Formula	30%
Total Funding adjustment	\$11,907

(Numbers will be finalized once regulatory approval has been obtained)

8 Appendix 1: Glossary of Terms

Item	Definition
Act	Education Act
Assessment Guide	The guide prepared by the E&E Review Team and the Ministry of Education which will be used as the basis for determining the overall effectiveness and efficiency of each Consortium
Common Practice	Refers to a set of planning parameters that have been reported by Ontario school boards as the most commonly adopted planning policies and practices. These are used as references in the assessment of the relative level of service and efficiency.
Consortium, the; or RCJTC	The Renfrew County Joint Transportation Consortium
Deloitte	Deloitte & Touche LLP (Canada)
Driver	Refers to bus Drivers, see also operators
E&E	Effectiveness and Efficiency
E&E Review Team	As defined in Section 1.1.5
E&E Reviews	As defined in Section 1.1.4
Effective	Having an intended or expected effect; the ability to deliver intended service
Efficient	Performing or functioning in the best possible manner with the least waste of time and effort; the ability to achieve cost savings without compromising safety
Evaluation Framework	The document, titled “Evaluation Framework for the Renfrew County Joint Transportation Consortium” which supports the E&E Review Team’s Assessment; this document is not a public document
Funding Adjustment Formula	As described in Section 1.3.5
HR	Human Resources

Item	Definition
IT	Information Technology
JK/SK	Junior Kindergarten/Senior Kindergarten
KPI	Key Performance Indicators
Management Consultants	As defined in Section 1.1.5
Memo	Memorandum 2006: SB13, dated July 11 issued by the Ministry
Ministry	The Ministry of Education of Ontario
MPS	Management Partnership Services Inc., the routing consultant, as defined in Section 1.1.5
MTO	The Ministry of Transportation of Ontario
Operators	Refers to companies that operate school buses, boats or taxis and the individuals who run those companies. In some instances, an operator may also be a Driver.
Overall Rating	As Defined in Section 3.2 of the Evaluation Framework
Partner Boards, Member Boards, School Boards or Boards	The School Boards that have participated as full partners or members in the Consortium; the RCDSB and RCCDSB
RCDSB	Renfrew County District School Board
RCCDSB	Renfrew County Catholic District School Board
Rating	The E&E Assessment score on a scale of High to Low, see Section 1.3.4
Report	The report prepared by the E&E Review Team for each Consortium that has undergone an E&E Review (i.e. this document)
Separate Legal Entity	Incorporation

9 Appendix 2: Financial Review – by School Board

Renfrew County District School Board

Item	2005/2006	2006/2007	2007/2008	2008/2009	2009/2010 ¹¹
Allocation ¹²	\$6,266,051	\$6,331,413	\$7,061,095	\$7,292,509	\$7,462,484
Expenditure ¹³	\$6,694,420	\$6,898,505	\$6,855,436	\$8,031,592	\$7,869,933
Transportation Surplus (Deficit)	(\$428,369)	(\$567,092)	(\$205,659)	(\$739,083)	(\$407,449)
Total Expenditures paid to the Consortium	\$6,694,420	\$6,898,505	\$6,855,436	\$8,031,592	\$7,869,933
As % of total Expenditures of Board	100%	100%	100%	100%	100%

Renfrew Country Catholic District School Board

Item	2005/2006	2006/2007	2007/2008	2008/2009	2009/2010
Allocation	\$3,842,068	\$3,738,820	\$3,814,605	\$3,937,431	\$3,956,371
Expenditure	\$3,369,853	\$3,378,007	\$3,497,462	\$3,977,119	\$3,957,738
Transportation Surplus (Deficit)	\$472,215	\$360,813	\$317,143	(\$39,688)	(\$1,367)

¹¹ 2009/2010 allocations and expenditures based on Ministry data – Revised Estimates for 2009/2010

¹² Allocation based on Ministry data – includes all grant allocations for transportation (Section 9 00008C, Section 13 00006C, Section 13 00012C)

¹³ Expenditure based on Ministry data – taken from Data Form D: 730C (Adjusted expenditures for compliance) – 212C (Other Revenues) + 798C (Capital expenditures funded from operating)

Item	2005/2006	2006/2007	2007/2008	2008/2009	2009/2010
Total Expenditures paid to the Consortium	\$3,369,853	\$3,378,007	\$3,497,462	\$3,977,119	\$3,957,738
As % of total Expenditures of Board	100%	100%	100%	100%	100%

Appendix 3: Document List

1. 08-09 TRANS PROVIDERS - PARENT BLANK INVOICES.xls
2. A-3 Strategic Plan.pdf
3. A-6 Work Plan Checklist.pdf
4. Accident Report Form
5. Article - Appeals to council for support in Lobbying
6. Article - Bell tolls for school times
7. Article - Boards "Snowing" Public On Staggered Bells
8. Article - Boards had already made decision before consultation with parents
9. Article - Bus driver died at scene
10. Article - County boards forced into staggered bells
11. Article - Disapproval and outrage still remain
12. Article - Reduction in routes
13. Article - Staggered bells will complicate the lives of many families
14. Article - Staggered-bell system could cost municipalities money
15. Article - Town to make views known on staggered bells for schools
16. Board Bus for Sale.pdf
17. Booster Seat Sign Up Sheet.DOC
18. Budget.xls
19. Consortia Plan Letter- Dec 3, 2007- Revised Structure.pdf
20. Consortia Plan Submission.pdf
21. Consortia Plan Submission Appendixes 1 - 6.pdf
22. Contract 0910 with changes from MTG JUNE 19.doc

23. CONTRACT AMOUNTS.XLS
24. Contract - Behnke Transport Ltd S.pdf
25. Contract - Barr Bus Lines S.pdf
26. Contract - Cobden Bus Lines S.pdf
27. Contract - Daniel Stamplecoskie S.pdf
28. Contract - Dennis Musclow S.pdf
29. Contract - Donohue Bus Lines S.pdf
30. Contract - Estimated Parent - Taxi Cost 08-09.xls
31. Contract - Grace Hanniman S.pdf
32. Contract - Inclement Weather Days.xls
33. Contract - J&V Manion Inc S.pdf
34. Contract - Joseph Holly Bus Lines S.pdf
35. Contract - Kenneth Mullin S.pdf
36. Contract - Lloyd & Faye Bus Lines S.pdf
37. Contract - MacMunn Bus Line S.pdf
38. Contract - MacMunn Bus Line S.pdf
39. Contract - MJC Transport S.pdf
40. Contract - Renfrew County Bus Lines S.pdf
41. Contract - ROUTE - PRICE BREAKDOWN(LORNE).XLS
42. Contract - Schauer Bus Lines S.pdf
43. Contract - Simon Kelly Declaration Only
44. Contract - Skelhorn Bus Lines S.pdf
45. Contract - Valley Transportation S.pdf

46. Contract - Vaudry Bus Lines S.pdf
47. Contract - Vicman Transportation S.pdf
48. Contract - Whitewater Bus Lines S.pdf
49. Courtesy Ride Application
50. Courtesy Ride Approval or Denial
51. Cross Boundary Transfer
52. Double Run
53. DRIVER AWARENESS Schedules, Agenda, Attendance.XLS
54. E&E Financials - Renfrew County JTS.xls
55. Edulog Contract.pdf
56. EVALUATION.XLS
57. First Rider Evaluation Form
58. First Rider Memo to Principals
59. First Ride Procedures SEP222009.DOC
60. General Manager draft Sept 18 09.doc
61. GUIDING PRINCIPALS DRAFT SEP212009.doc
62. Incident Report Form
63. IW Spotters Report Form
64. Inclement Weather Procedures
65. Joint Trans Policy for Web Page (PJD)
66. List of Operators - Info 2007-2008.xls
67. Letter of opinion re: Conflict Issue – Bus Transportation Contracts
68. Meetings - 2008 Dec 15 RCJTC Gov Agenda Pkg.pdf

69. Meetings - 2008 Nov 20 RCJTC Gov Agenda Pkg.pdf
70. Meetings - 2008 Oct 21 RCJTC GOV Agenda Pkg.pdf
71. Meetings - 2008 Oct 21 RCJTC GOV MINUTES.pdf
72. Meetings - 2008 Sep 15 RCJTC Gov Agenda Pkg.pdf
73. Meetings - 2008 Sept 15 RCJTC GOV MIN DRAFT.pdf
74. Meetings - 2009 Apr 22 RCJTC Gov Agenda Pkg S.pdf
75. Meetings - 2009 Apr 22 RCJTC Gov Min Signed.pdf
76. Meetings - 2009 Feb 17 RCJTC Gov Agenda Pkg.pdf
77. Meetings - 2009 Feb 17 RCJTC Gov Minutes.pdf
78. Meetings - 2009 Jan 19 RCJTC Gov Agenda Pkg S.pdf
79. Meetings - 2009 Jan 19 RCJTC Gov Mins.pdf
80. Meetings - 2009 Jul 13 RCJTC Gov Agenda Pkg S.pdf
81. Meetings - 2009 Jul 20 RCJTC Gov & Operators Mtg Min.pdf
82. Meetings - 2009 Jun 16 RCJTC Gov Agenda Pkg S.pdf
83. Meetings - 2009 Jun 16 RCJTC Gov Min Signed.pdf
84. Meetings - 2009 Jun 16 RCJTC Gov Min Signed.pdf
85. Meetings - 2009 Mar 23 RCJTC Gov Agenda Pkg.pdf
86. Meetings - 2009 Mar 23 RCJTC Gov Min Signed.pdf
87. Meetings - 2009 May 19 RCJTC Gov Agenda Pkg.pdf
88. Meetings - 2009 May 19 RCJTC Gov Min Signed.pdf
89. Meeting Dates for 2009 2010.xls
90. Meetings - MINUTES RCJTC GOV NOV 20 2008 FINAL.pdf
91. Meetings - RJTC STAFF AGENDA JUN182009.DOC

- 92. Meetings - RCJTC STAFF AGENDA APR162009.DOC
- 93. Meetings - RCJTC STAFF AGENDA DEC182008.DOC
- 94. Meetings - RCJTC STAFF AGENDA FEB192009.DOC
- 95. Meetings - RCJTC STAFF AGENDA JAN152008.DOC
- 96. Meetings - RCJTC STAFF AGENDA JUL 232009.DOC
- 97. Meetings - RCJTC STAFF AGENDA JUN182009.DOC
- 98. Meetings - RCJTC STAFF AGENDA MAR192009.DOC
- 99. Meetings - RCJTC STAFF AGENDA MAY212009.DOC
- 100. Meetings - RCJTC STAFF AGENDA NOV202008.DOC
- 101. Meetings - RCJTC STAFF AGENDA OCT162008.DOC
- 102. Meetings - RCJTC STAFF AGENDA SEP182008.DOC
- 103. Meetings - RJTC MEETING MINUTES APR162009.doc
- 104. Meetings - RCJTC MINUTES DEC182008.DOC
- 105. Meetings - RCJTC MINUTES DEC182008.DOC
- 106. Meetings - RCJTC MINUTES FEB192009.DOC
- 107. Meetings - RCJTC MINUTES JAN 152009.DOC
- 108. Meetings - RCJTC Minutes Mar 192009.doc
- 109. Meetings - RCJTC MINUTES NOV 202008.DOC
- 110. Meetings - RCJTC MINUTES OCT162008.DOC
- 111. Meetings - RCTC MINUTES APR162009.doc
- 112. Meetings - RCTC MINUTES Aug 20 2009.doc
- 113. Meetings - RCTC MINUTES Jun 18 2009.doc
- 114. Meetings - RCTC MINUTES May 212009.doc

- 115. Meetings - RCJTC MINUTES FEB192009.doc
- 116. Meetings - RCJTC MINUTES JAN 152009.doc
- 117. Meetings - RCJTC Minutes Mar 192009.doc
- 118. Meetings - RCJTC MINUTES NOV 202008.DOC
- 119. Meetings - RCJTC MINUTES OCT162008.DOC
- 120. Meetings - RCJTC MINUTES APR162009.doc
- 121. Meetings - RCJTC MINUTES Aug 20 2009.doc
- 122. Meetings - RCJTC MINUTES Jun 18 2009.doc
- 123. Meetings - RCJTC MINUTES May 212009.doc
- 124. Meetings - RCJTC MINUTES Oct 172009.doc
- 125. Meetings - Student Transportation Guide for Parent's - Guardians.pdf
- 126. ORG CHART.DOC
- 127. Operator Payment Sample.pdf
- 128. Operator Certificate of Insurance (sample)
- 129. Operator driver training manual (sample)
- 130. Operator WSIB Certificate of Clearence (sample)
- 131. Operator safety/brake inspection schedule (sample)
- 132. Operator signed driver confidentiality agreements (samples)
- 133. OSBIE Letter re: RCCDSB insurance
- 134. Principals Memo First Ride Prog Staggered Bells.DOC
- 135. Principals Memo First Ride Prog Non-staggered bells.DOC
- 136. Prinicipal Memo- Driver Awareness JUN.DOC
- 137. PROPOSAL 08-09 SPEC ED REVIEW.DOC

- 138. RCJTC Company information sheet (sample)
- 139. RCJTC Staff confidentiality agreements
- 140. RCJTC.A.01.0 -Mission Statement
- 141. RCJTC.A.02.0 -Joint Policy "Manual" for RCJTC
- 142. RCJTC.A.02.0 -Transfer of Bus Operator Contracts
- 143. RCJTC.A.04.0 -School Bell Time Change Procedure
- 144. RCJTC.A.06.0 -Transportation Services Evaluation for Schools
- 145. RCJTC.A.07.0 -Student Discipline on Buses
- 146. RCJTC.A.10.1 -Responsibility of Students
- 147. RCJTC.A.10.2 -Responsibility of Parents/Guardians
- 148. RCJTC.A.10.3 -Responsibility of Schools
- 149. RCJTC.A.10.4 -Responsibility of Bus Operators
- 150. RCJTC.A.10.5 -Responsibility of Bus Drivers
- 151. RCJTC.A.10.6 -Responsibility of RCJTC
- 152. RCJTC.F.01 -Budget Procedures
- 153. RCJTC.F.01.1 -Budget Flow Chart
- 154. RCJTC.F.02.0 -Operator Contract Calculation Procedures
- 155. RCJTC.F.02.7 -Operator Contracts
- 156. RCJTC.F.02.8 -Operator Contract Requirements
- 157. RCJTC.F.03.0 -Invoice Processing Procedures
- 158. RCJTC.O.01 -Student registration procedure
- 159. RCJTC.O.04 -Young Student registration procedure
- 160. RCJTC.O.06 -Bus stop change request procedure

- 161. RCJTC.O.07 -Joint custody procedure
- 162. RCJTC.O.08 -Courtesy Ride procedures
- 163. RCJTC.O.08.1 -Letter of Authorization/Denial for courtesy ride
- 164. RCJTC.O.09 -Special needs transportation procedure
- 165. RCJTC.O.11 -Lost child procedure
- 166. RCJTC.O.12 -Daycare procedures
- 167. RCJTC.O.13 -Taxi arrangement procedure
- 168. RCJTC.O.16 -Temporary Transportation procedures
- 169. RCJTC.O.17 -Alternate address procedure
- 170. RCJTC.O.18 -Late Bus procedure
- 171. RCJTC.O.19 -Field trip procedure
- 172. RCJTC.O.20 -Special Busing procedure – secondary students
- 173. RCJTC.O.21 -Bus loading / unloading procedure
- 174. RCJTC.O.30 -Route review procedures
- 175. RCJTC.O.33 -Out of boundary procedures
- 176. RCJTC.O.80 -Inclement Weather Procedure
- 177. RCJTC.IT.01 -Transportation Software
- 178. RCJTC.IT.2.1 -Digital Map Maintenance
- 179. RCJTC.IT.03 -Disaster Recovery Procedure
- 180. RCJTC.S.01 -RCJTC First Ride Program
- 181. RCJTC.S.02 -First Aid / CPR Certification
- 182. RCJTC.S.03 -Hazard Checklist
- 183. RCJTC.S.04 -Bus evacuation procedures

184. RCJTC.S.05 -School Bus Danger Zones
185. RCJTC.S.06 -School Bus Mirror adjustment procedures
186. RCJTC.S.07 -Accident Reporting procedures
187. RCJTC.S.08 -Incident Reporting procedures
188. RCJTC.S.09 Epipen procedures
189. RCJTC BUS DRIVER BUSINESS CARD APR082009.DOC
190. RCJTC Route Information sheets (samples)
191. RCJTC Master Route List
192. RCJTC STAFF CALENDAR.XLS
193. RCJTC SUCCESSION PLAN TIME LINE.XLS
194. RCJTC Operators Meeting Draft MINUTES April162009.Doc
195. request for special busing consideration_high school only 0321207.doc
196. Request for Bell time Change
197. Renfrew County Joint Transportation Consortium Capacity Building Report - FINAL.pdf
198. Renfrew Report - Jan 16 2005.pdf
199. Renfrew report.pdf
200. Route Planner draft Sept 18 09.doc
201. REV. TRANS. INQUIRY FORM.XLS
202. Sample Operator Contracts
203. SCHOOL BUS VIOLATION FORM.XLS
204. Schools Schedule - 2009.xls
205. SECOND SPEC ED REVIEW 07-08.XLS
206. Secretary Transportation Services draft Sept 18 09.doc

- 207. SPEC ED REVIEW 07-08.XLS
- 208. Special Busing procedure – secondary students
- 209. Snapshot Transportation Survey 08-09.xls
- 210. Student Discipline
- 211. Student Transportation Service Supervisor draft Sept 18 09.doc
- 212. Transportation Application
- 213. TRANS DISPUTE RESOLUTION RCJTC 011108.DOC
- 214. Transportation Business Card
- 215. Transportation Department Memorandum re: request for quotes for Taxi Route

Appendix 4: Common Practices

Home to School Distance

Activity	JK/SK	Gr. 1 - 8	GR. 9 - 12
Common Practice	0.8 km	1.2 km	3.2 km
Policy - RCDSB	0.5 km	1.6 km	1.6 km
Policy - RCCDSB	0.5 km	1.6 km	1.6 km

Note: Distance is 2.5 km for grades 7 - 12 in Urban/Developed Areas

Home to Bus Stop Distance

Activity	JK/SK	Gr. 1 - 8	GR. 9 - 12
Common Practice	0.8 km	1.2 km	3.2 km
Policy - RCDSB	0.5 km	1.6 km	1.6 km
Policy - RCCDSB	0.5 km	1.6 km	1.6 km

Note: Distance is 2.5 km for grades 7 - 12 in Urban/Developed Areas

Arrival Window

Activity	JK/SK	Gr. 1 - 8	GR. 9 - 12
Common Practice	18	18	25
Policy - RCDSB	30	30	30
Policy - RCCDSB	30	30	30

Departure Window

Activity	JK/SK	Gr. 1 - 8	GR. 9 - 12
Common Practice	16	16	18
Policy - RCDSB	-	-	-
Policy - RCCDSB	-	-	-

Earliest Pick up Time

Activity	JK/SK	Gr. 1 - 8	GR. 9 - 12
Common Practice	6:30	6:30	6:00
Policy - RCDSB	-	-	-
Policy - RCCDSB	-	-	-

Latest Drop off Time

Activity	JK/SK	Gr. 1 - 8	GR. 9 - 12
Common Practice	5:30	5:30	6:00
Policy - RCDSB	-	-	-
Policy - RCCDSB	-	-	-

Maximum Ride Time

Activity	JK/SK	Gr. 1 - 8	GR. 9 - 12
Common Practice	75	75	90
Informal Parameter- RCDSB	60	60	60
Informal Parameter- RCCDSB	60	60	60

Note: 95% of students ride lengths are < 60 Minutes

Seated Students per Vehicle

Activity	JK/SK	Gr. 1 - 8	GR. 8 - 12
Common Practice	69	69	52
Policy - RCDSB	-	-	-
Policy - RCCDSB	-	-	-
Practice	69	69	52

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