



Ministry of Education Effectiveness & Efficiency Review

Student Transportation of Eastern Ontario

E&E Phase 4 Review

January 2011

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 Student Transportation of Eastern Ontario (hereafter “STEO” 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, and Contracting – 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 review of Consortium Management found that while the Member Boards have established a Consortium, it is a Consortium in name only as the policies, practices and operations of the Member Boards have not yet been integrated in a manner conducive to the effective and efficient delivery of integrated transportation services. At the time of the Review, the Boards notified the E&E Review Team that a recent decision was made to ramp up efforts towards service delivery through a Consortium. Therefore, it is recommended that the Member Boards work together to support a Consortium that functions in the manner envisioned by the Consortium Agreement. The Member Boards have previous experience with the Consortia model for transportation service delivery and are aware of the increased operational effectiveness and efficiency that such a structure can bring. The Member Boards should work to establish the Consortium as a separate legal entity with its own distinct operational structure and practices. Strong management and oversight is the foundation on which effective and efficient Consortia are built. These practices should leverage the strengths in each of the individual Member Boards’ transportation departments while also reflecting the best practices identified through previous E&E Reviews and in the Leading Practices Guide.

While STEO exists as an entity, there is no policy and practice infrastructure that is specific to the organization. Consequently, all guidance related to service expectations and how services will be provided is given through individual Board policy statements and individual departmental operating procedures. The continued independence of the two departments is inconsistent with the expectations of the E&E process. The presence of two operations includes a number of functional and administrative redundancies and limits the opportunity to identify efficiency opportunities between the Boards.

Establishing a collection of harmonized policies and procedures will be a significant initiative that should be undertaken immediately. Many of the current policies and practices of the two Boards are at least consistent, if not identical, which should expedite the development process. Reconciling previous interpretations of policy and procedure and establishing a unified approach to implementation across the Consortium is likely to require the most significant effort in the short term. Previous efforts, including the establishment of a joint inclement weather procedure and a Standards of Performance framework for operations, are good examples of how the Boards can collaborate to create policies and procedures that are appropriate for both Member Boards.

Route planning activities are completely separate between the two organizations, as is the acquisition and management of transportation technology. Transportation staff at each Board make an effort to share resources where possible but the efforts are ad hoc and occur only after each Board has maximized its individual utility of the assets. In order to develop routing scheme, the Boards use a number of common data systems, but each is used and managed independently. This results in administrative redundancies in the overall management of the software and technology, duplication of costs in that both Boards are paying for similar systems, and prevents the identification of efficiency opportunities that could improve the effectiveness and/ or efficiency of transportation.

Creating a unified planning organization for STEO will allow for immediate organizational efficiencies in the management of technology and will begin the process of identifying routing efficiencies based on a unified routing structure between the Boards. Realizing these benefits will require significant efforts on the part of STEO staff, and will require that the Governance and Administrative committees establish the constraints for the route design and evaluate the feasibility of key constraints such as bell times, student ride times, and integration of students from the Boards on a single bus. Accomplishing these goals can only occur if the route planning function has sufficient perspective on all demands, all of the assets, and all of the constraints for both Boards. Establishing a single planning organization will provide that needed perspective.

The transportation departments each have comprehensive operator contracts and require operators to adhere to clearly defined standards and expectations. In addition, the transportation departments have effective and efficient programs to monitor operator compliance and performance. However, contracting practices and policies should be standardized and implemented on a Consortium-wide basis. It is highly recommended that the Consortium develop plans for the implementation of competitive procurement, for standard contracts for the Consortium, along with integrated monitoring practices.

The Consortium should also require that all drivers have appropriate safety training prior to beginning their routes.

As a result of this review of current performance, the Consortium has been rated **Low**. Based on this evaluation, the transportation allocation for the Catholic District School Board of Eastern Ontario (“CDSBEO”) and the Upper Canada District School Board (“UCDSB”) will remain unchanged in the 2010- 11 school year.

It should be noted that the overall “Low” rating is not a reflection of staff performance but rather the result of a late implementation of the consortium model. Although the consortium requirement was issued by the Ministry in August 2006, STEO experienced challenges in developing joint transportation operations. At the time of the Review, direction was provided to staff to move forward with the full implementation of the consortium model and to developing the Consortium. It should be noted that the E&E review rating is based on a snapshot in time, and acknowledges that STEO is still in its early stages. The recommended changes represent a significant shift in the operating paradigm that currently governs transportation services at STEO. Implementation of these recommendations by staff, particularly in the governance and organizational aspects of consortium development, will require coordination and support from the Member Boards in the months ahead.

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 2010-2011, an increase of over \$267 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.

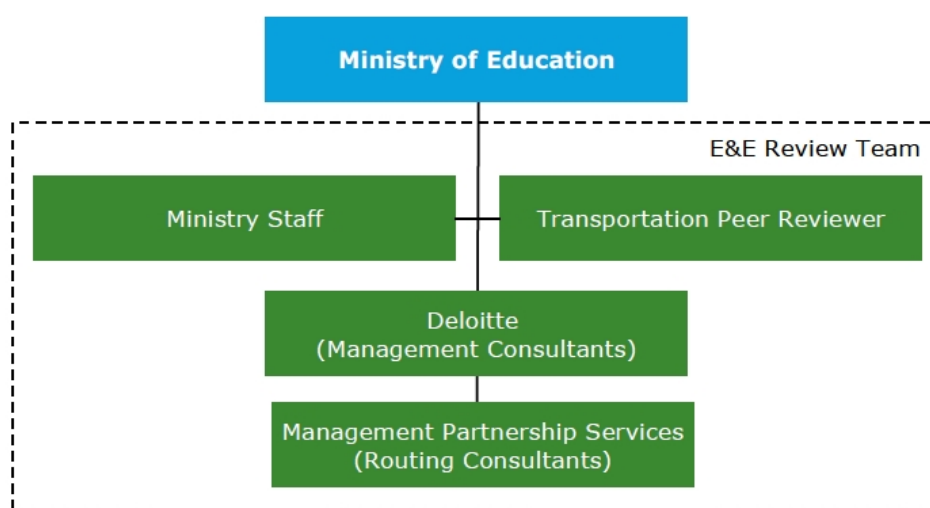
1.1.4 Effectiveness and Efficiency Review

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:

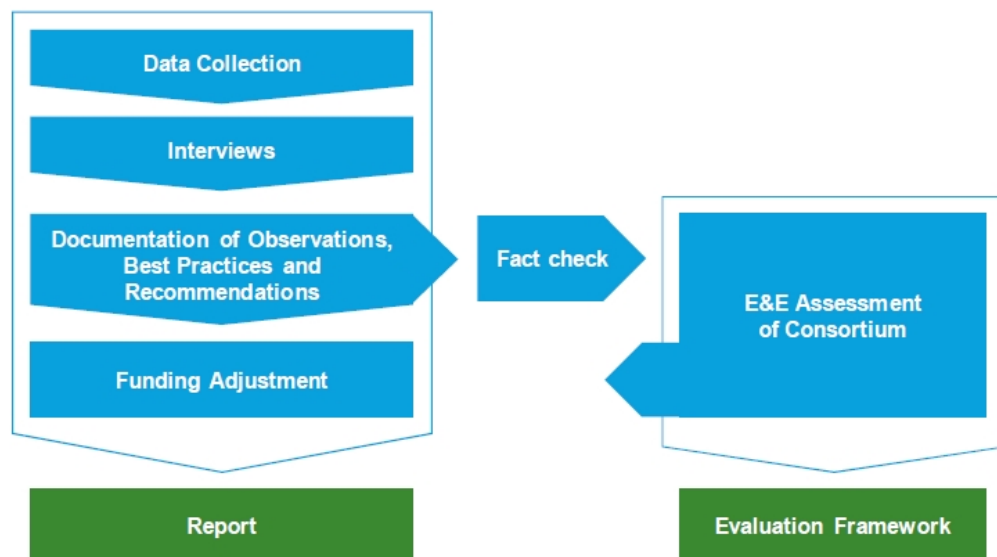
- Lead the planning and execution of E&E Reviews for each of the 25 transportation consortia to be reviewed in Phases Three and Four (currently in phase 4);
- At the beginning of each E&E Review, convene and moderate E&E Review Team planning meetings to determine data required and availability prior 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 on 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 are given below.

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

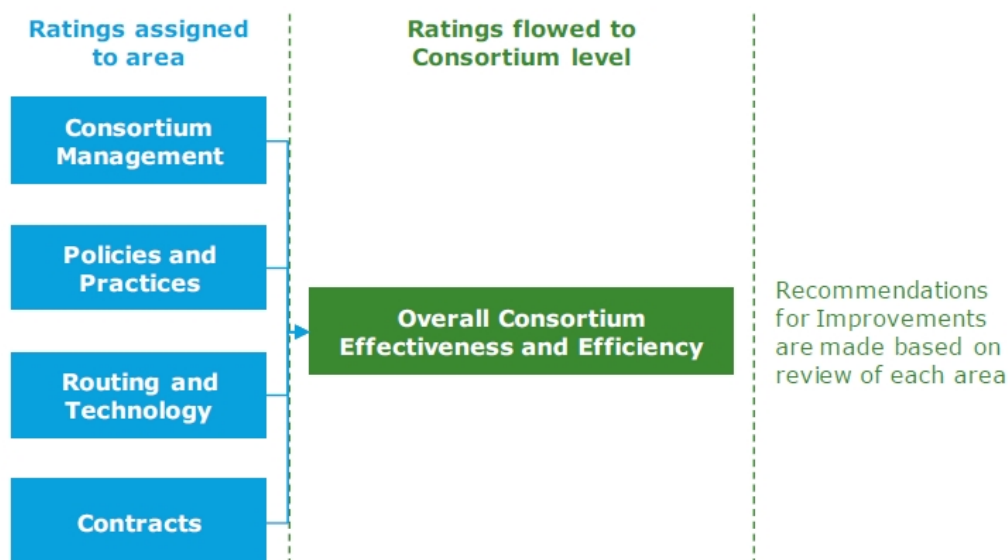
- Contracts exist for all service providers, including taxi, boat and/or municipal transit services and parent drivers
- Contracts are structured to ensure accountability and transparency between contracted parties
- All operator contracts are complete with respect to recommended clauses
- Compensation 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 0% | 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 January 10, 2011.

1.3.7 Materials 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

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

Consortium staff, outside stakeholders, and key policy makers to arrive at the assessment and rating of the Consortium.

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

While the Consortium Agreement that formally created the Consortium has been signed, the Consortium is not operational as such and each Member Board's transportation department is responsible for providing transportation services to its students (i.e., the CDSBEO transportation department facilitates transportation services for CDSBEO students and the UCDSB transportation department facilitates transportation services for UCDSB students). It is envisioned that the STEO will eventually be responsible for the formal and integrated management and facilitation of student transportation services for both Boards.

Together, the two transportation departments provide transportation services for approximately 35,500 students across more than 150 schools. These services are provided by 40 different operators, who use over 775 vehicles to service the 1,043 runs.

The geographic area covered by the Consortium is a combination of urban and rural areas. The service area is close to 12,200 square kilometres and encompasses the United Counties of Prescott & Russell, the United Counties of Stormont, Dundas & Glengarry, the United Counties of Leeds & Grenville, and the County of Lanark.

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

Table 2: 2009-10 Transportation Survey Data²

| Items | CDSBEO | UCDSB | Total |
|---|--------|--------|--------|
| Number of schools served | 56 | 90 | 146 |
| Total general transported students | 10,055 | 13,799 | 23,854 |
| Total special needs ³ transported students | 84 | 927 | 1,011 |
| Total wheelchair accessible transportation | 17 | 47 | 64 |
| Total specialized program ⁴ transportation | 280 | 6,151 | 6,431 |

² 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. Data reported in this section of the report includes noon-hour transportation.

³ 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

| Items | CDSBEO | UCDSB | Total |
|--|--------|--------|--------|
| Total courtesy riders | 644 | 2,306 | 2,950 |
| Total hazard riders | 405 | 229 | 634 |
| Total students transported daily | 11,485 | 23,459 | 34,944 |
| Total public transit riders | 24 | 10 | 34 |
| Total students transported including transit riders | 11,509 | 23,469 | 34,978 |
| Total contracted full and mid-sized buses ⁵ | 149 | 374 | 523 |
| Total contracted mini buses | 66 | 27 | 93 |
| Total contracted school purpose vehicles ⁶ | 38 | 95 | 133 |
| Total contracted PDPV | 0 | 0 | 0 |
| Total contracted taxis | 3 | 0 | 3 |
| Total number of contracted vehicles | 256 | 496 | 752 |

Table 3: 2009-2010 Financial Data

| Items | CDSBEO | UCDSB |
|----------------------------------|------------|------------|
| Allocation | 13,511,133 | 24,191,269 |
| Net expenditures | 12,882,883 | 24,227,190 |
| Transportation surplus (deficit) | 628,230 | (35,921) |

⁴ 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.

⁵ 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.

⁶ Includes school-purposed vans, mini-vans, and sedans.

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

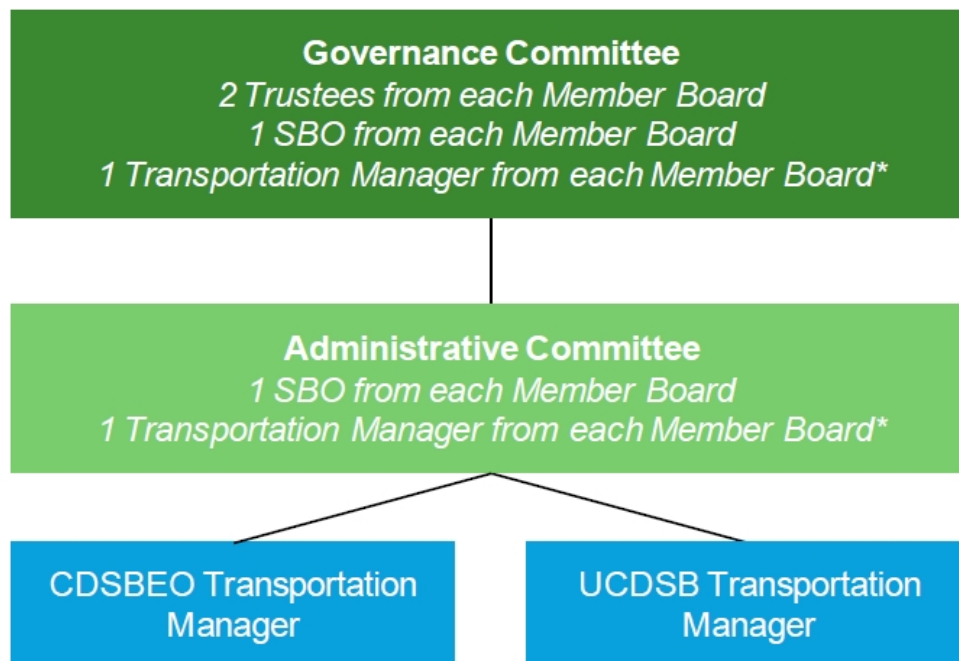
Governance refers to the way in which an organization is directed and controlled. Establishing administrative structures and processes that facilitate, monitor, measure and improve effective business management are primary responsibilities of a governance structure. Three key principles for an effective 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 illustrated below:

Figure 4: Consortium Governance Structure



* Transportation managers are non-voting members

The Consortium Agreement outlines the roles and responsibilities of the Governance Committee and the Administrative Committee. The Governance Committee's purpose is to provide direction to the Consortium, and its primary roles and responsibilities are to:

- Develop Consortium-wide strategic direction and common operating procedures;
- Foster and facilitate inter-Board cooperation and sharing of information;
- Review and recommend approval of the annual administrative operating and capital budgets;
- Review and recommend approval of an annual plan setting out proposed service delivery efficiencies and anticipated cost savings for each Member Board for the coming year and approve a year-end report comparing actual performance to planned performance for the year;

- Review and recommend improvements and changes to the Consortium Agreement;
- Review and recommend approval of contracts with transportation service providers;
- Mediate and resolve any issues brought forward by the Administrative Committee;
- Refer issues to the Administrative Committee;
- Report to each Board as required; and
- Approve the Consortium's organizational structure.

The Administrative Committee's purpose, as outlined in the Consortium Agreement, is to oversee day to day operations of the Consortium. The Member Boards' transportation managers will work with the Administrative Committee on:

- Operator contract issues;
- Operator negotiations;
- Budget matters;
- Policy and regulation matters;
- Staffing concerns;
- Safety issues;
- Accounting, auditing and all fiscal matters;
- Transportation issues (i.e., service levels, parent requests for policy exceptions); and
- Ministry of Education and Ministry of Transportation policy directions and regulations.

The Governance Committee is required to meet at least three times a year, while the Administrative Committee is required to meet at least monthly. The position of the Chair of the Governance Committee alternates annually between the trustee representatives from each Member Board. The Governance Committee operates by consensus.

The Governance Committee meetings are recorded, ratified and signed. The Administrative Committee meetings are recorded but are not ratified or signed.

Both the Governance Committee and the Administrative Committee are responsible for reporting on transportation matters to the Member Boards – the Governance Committee through the trustees, and the Administrative Committee through the Superintendents of Business.

At the time of the E&E Review the Consortium's Governance and Administrative Committees had only had a few inaugural meetings and had not yet fully assumed the responsibilities as outlined above.

Board level governance and arbitration clause

The Consortium Agreement includes a dispute resolution clause that states that disagreements will be referred to a mediator jointly selected by the Administrative Committee, and then to a single arbitrator selected by the Member Boards (or the Administrative Committee, if the Member Boards cannot agree). Disputes, differences or questions arising between the Member Boards will be determined by arbitration.

3.2.2 Best practices

Structure of the Governance Committee

The Governance Committee, which is charged with oversight responsibilities for the Consortium, has equal representation from each Member Board. Equal representation promotes fairness and equal participation in decision making and ensures the rights of each Board are considered equally. This is a key element in effective governance and management.

Dispute resolution

A Board level dispute policy is in place between the Boards. The policy is an effective mechanism to protect the rights of both Boards. It ensures that the decisions made represent the best interests of both Boards.

3.2.3 Recommendations

Separate operations from governance

An effective governance structure calls for a clear line to be drawn between the Consortium's oversight structures and the management of the Consortium's operations. This line is less easily determined when there are operational functions being performed by one of the Consortium's governance structures (specifically the Administrative

Committee). While it is recognized that the role of the Administrative Committee is to guide the development of the Consortium, it is recommended that its documented role be evaluated to ensure the effective delegation of operational tasks to Consortium management. By doing so, the Administrative Committee's role will be better defined as an oversight and approval function, while Consortium management will be sufficiently independent and empowered to perform its specialized transportation function. It is therefore recommended that the Member Boards consider amending the Consortium Agreement to clarify that the Administrative Committee will function in an oversight role and will not be involved in the day to day operations of the Consortium.

Administrative Committee meetings should be documented and ratified

Decisions made by the Administrative Committee 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 minutes signed in a manner similar to that used for meetings of the Governance Committee.

Simplify reporting channels

Both the Governance Committee and the Administrative Committee are responsible for reporting on transportation matters to the Member Boards, which can result in inefficiencies and duplication of efforts. The Consortium should consider simplifying the reporting channels by choosing to have a single conduit (e.g., Governance Committee) through which transportation matters can be reported on to the Member Boards.

3.3 Organization 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

While the Consortium Agreement that formally created the Consortium has been signed, the Consortium is not operational as such. At the time of the on-site review, the transportation operations are comprised of the individual Member Boards' transportation departments, and the provision of transportation services is directly facilitated by the Member Boards.

The Consortium is not a separate legal entity and each transportation department works from its own offices (i.e., the CDSBEO transportation department works out of the CDSBEO offices and the UCDSB transportation department works out of the UCDSB offices). Each transportation department is responsible for managing its own day-to-day transportation operations and independently maintains policy and operating procedures pertaining to transportation services.

Consortium Agreement

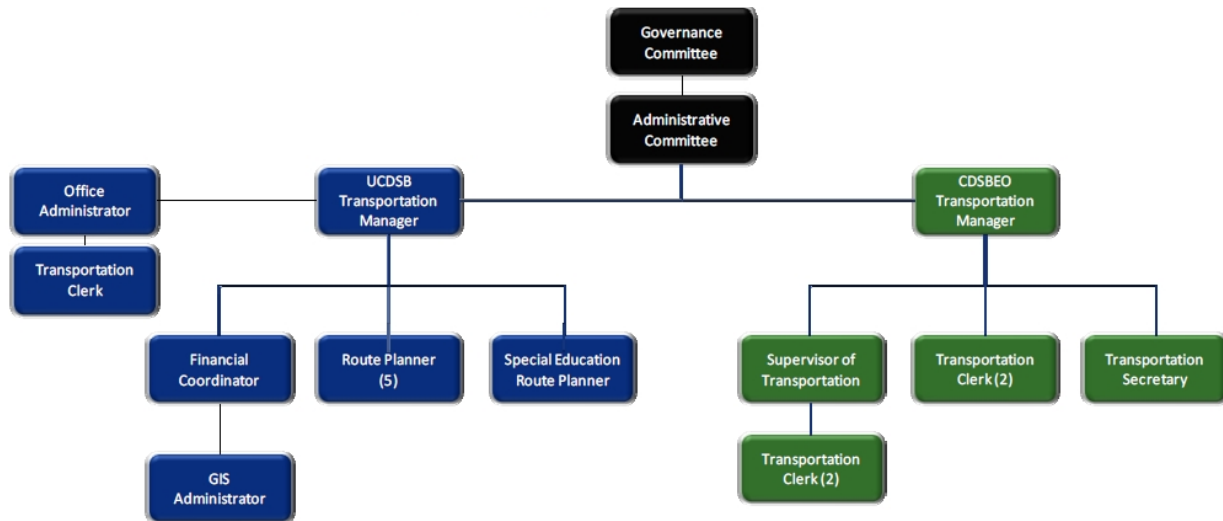
The Consortium Agreement delineates the relationship between the two Member Boards and details aspects of the Consortium's structure and operations. It speaks to, among other things:

- The Consortium's mission: to provide safe, efficient and effective student transportation services to all registered students irrespective of the school attended;
- The Consortium's governance structure: the Governance Committee's composition, roles and responsibilities, and the Administrative Committee's composition, roles and responsibilities;
- The Consortium's staffing: the staff will remain employed by their respective Boards but will work with the Consortium under the direction of the transportation managers;
- The Consortium's ability to set bell times for all schools and to plan efficient and effective routes;
- The sharing of costs related to the Consortium's administration and operations; and
- Other items related to: insurance, dispute resolution, termination, indemnification, and use of data.

Organization of entity

The Consortium's employees are employed by their respective Member Board. The Consortium's current organizational chart is illustrated below:

Figure 5: Organization Chart – Current



Job descriptions that outline each position's specific roles and responsibilities, supervisory capacities, and required qualifications are available.

3.3.2 Best practices

Agreement clauses

The Consortium Agreement in place between the Member Boards contains sufficient detail on key provisions such as cost sharing, dispute resolutions, oversight, and the role of the Consortium. This is important in that it clearly defines the relationship between the Member Boards in the delivery of safe, effective and efficient student transportation services. Since the Member Boards have signed the Consortium Agreement, it acts as the legal document governing the Consortium. However, the Consortium Agreement still needs to be implemented in practice.

3.3.3 Recommendations

Establishment of a Separate Legal Entity

Generally speaking, all partners of a partnership are jointly liable for all debts and liabilities of that partnership. Similarly, any one partner can bind all other partners to matters involving the partnership. As a result, partnerships have several inherent risks

which make them less than optimal entity structures for coordinating student transportation:

- The risk that the actions of one Board may leave the other Board open to liability;
- The risk that one Board could be involved in litigation for issues involving students that are not part of its Board; and
- The risk that liability, brought about through the partnership, may exceed the existing insurable limits. With the assistance of its insurance carrier, the Consortium should investigate its coverage related to, but not limited to: punitive damages; human rights complaints; wrongful dismissal lawsuits; and errors and omissions.

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 to mitigate the risks mentioned above. The creation of a separate legal entity effectively limits risk to the Member Boards 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. Over the long term, changing political environments and potential disputes between the Member Boards could destabilize the Consortium's structure. The formalization of the Consortium as a corporation would provide benefits from an organizational perspective in terms of corporate continuity, staff planning, liability, contracting and management.

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

Integrate staff and sign secondment agreements

Each of the transportation departments operates separately. One of the first steps for the implementation of the Consortium will be to integrate the staff of both transportation departments under common leadership. It was brought to the E&E review team's attention that Member Boards have recently approved efforts to move forward with securing common leadership for the Consortium. While this is a positive step in integration, it is recommended that the Consortium sign appropriate secondment agreements with its Member Boards in order to document the relationship between the Member Boards and the Consortium and to provide additional clarity with respect to the terms on which Consortium staff will be seconded to the Consortium. Staff should also

be given a letter of understanding that documents any changes in their employment or reporting relationships. The Consortium should also take this opportunity to update job descriptions and ensure that all job descriptions appropriately reflect the nature of the work.

Centralize operations in a physically separate office

Going forward, it is recommended that the Consortium investigate facility options and centralize its operations in a single office location separate from either of the Member Boards' head and satellite offices. This will facilitate integrated operations and increased effectiveness and efficiency, while ensuring that the Consortium's structure and mandate remain consistent despite potential changes at the Member Board level.

Discuss the ability to rotate staff out of the Consortium 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 the collective bargaining unit's ability to move Consortium staff into and out of the organization. This is to ensure the retention of the investment made by the Consortium in specialized staff training and to foster the development of a cohesive, stable team. The Consortium and the Member Boards should also endeavour to inform their collective bargaining units of changes that are being implemented as the Member Boards move towards the Consortium model.

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 Agreement outlines the cost-sharing mechanism:

- Shared administrative expenditures shall be shared as determined by the Administrative Committee;
- Transportation costs for regular bus routes shall be shared based on weighted ridership (per route);

- Transportation costs for special needs bus routes shall be shared based on weighted ridership, and the Administrative Committee can adjust this allocation if the distance travelled by one or more students is not in proportion with other students on the vehicle (e.g., weighted kilometre), and, in rare situations, special needs students may be invoiced at a pre-determined rate; and
- Member Boards will be charged for routing costs based on the days of operation, as the school year calendars are not identical.

Where possible, costs are identified and allocated to the Member Board responsible for incurring the costs. Where resources are shared, costs are identified and allocated based on weighted ridership or on the ratio determined by the Member Boards' enrolment as of October 31st every year.

Each Member Board is responsible for developing and maintaining its own student database and providing the student database updated information to the Consortium on a daily basis.

Currently, there are no administrative costs being shared because the Member Boards' transportation departments operate as independent units. Some routes are shared and where this is the case, the transportation department holding the contract for the route invoices the other transportation department twice a year, at a weighted rate per student per route cost.

Transportation service agreements

The Consortium Agreement does not address the terms of services or the expected service levels that will be required of the Consortium and no transportation service agreements have been developed.

Purchase of service agreements / support services

The Consortium has not developed purchase of service agreements. Each transportation department uses its respective Member Board for procurement services, banking services, human resources services, and other administrative services – service agreements generally do not exist. (The CDSBEO's transportation operations department has a memorandum of cooperation with the CDSBEO's information and communication technology department that addresses the terms of service and expected service levels at a cursory level but not costs).

Procurement policies

The Consortium has not developed procurement policies. Each transportation department follows its respective Member Board's procurement policies.

Banking

The Consortium is not responsible for its banking services and does not have purchase of service agreements for banking services. Each transportation department uses its respective Member Board for banking services.

Insurance

Each Member Board has purchased insurance through the Ontario School Boards' Insurance Exchange ("OSBIE"). The insurance is valid from January 1, 2011 to January 1, 2012 and includes coverage for general liabilities. The Consortium has not purchased insurance.

Staff performance evaluation, training and management

The Consortium does not hold regular staff meetings attended by all staff – each transportation department holds staff meetings for its respective staff and communicates important goals and objectives through these meetings.

Staff performance evaluations are conducted in line with the human resources policies of each respective Member Board (i.e., staff employed by the CDSBEO are evaluated under the CDSBEO's human resources policy, and staff employed by the UCDSB are evaluated under the UCDSB's human resources policy).

Internal staff training and job-related training is provided to staff on a regular basis, and staff training initiatives are planned, documented and tracked. Employees are also cross-trained for coverage purposes and in line with professional development policies.

Long term and short term planning

The Consortium Agreement envisions the development of three-year "rolling" operating and capital forecasts but this practice has not been implemented, nor has it been incorporated in the strategic plan.

The Consortium has also drafted a strategic plan that is focused on achieving the Consortium's vision of being a leader in providing excellent student transportation services and on developing the Consortium's capabilities in consortium management, policies and practices, routing and technology, and contracts. While the strategic plan delineates key objectives and the responsibilities and general timelines associated with the objectives, it does not detail the key activities that will help achieve the expected

results. This strategic plan has been reviewed by the Administrative Committee but not by the Governance Committee.

There is a high-level outline of the process, structure, individuals and principles associated with the current strategic plan's development. However, there is no formal policy or procedure outlining roles and responsibilities for developing future strategic plans or when future strategic plans will be developed.

Each transportation department follows its respective Member Board's planning process.

Key performance indicators (KPIs)

The Consortium has developed a formal process outlining what KPIs will be tracked, reviewed and reported and how often the KPIs will be tracked, reviewed and reported. However, this process has not been implemented yet.

The Consortium expects to track, review and report on the following KPIs on a quarterly basis:

Consortium KPIs

- Number of routes
- Cost per route
- Daily kilometres
- Number of courtesy riders
- Transportation by grade
- Vehicle utilization capacity
- Cost per student
- Cost per month
- Average ride times
- Number of hazard riders
- Transportation as % of enrolled

Each transportation department currently tracks, reviews and reports on the following KPIs on a regular basis (the CDSBEO reports on them on an annual basis, whereas the UCDSB reports on them on a monthly basis):

Transportation Department KPIs

- Number of students
- Daily kilometres
- Number of routes
- Cost per route
- Courtesy and hazard riders
- Cost per student (only tracked by UCDSB)
- Number of buses
- Bus capacity
- Average ride times
- Transported students / enrolled students
- Rider breakdowns (only tracked by UCDSB)
- Cost per month (only tracked by UCDSB)

If operator issues are identified through KPI monitoring, the affected transportation department works with the operator(s) to identify and resolve the issue.

The UCDSB transportation department uses TRACS to prepare its KPI reports, which facilitates trending analysis. The report is then submitted to the UCDSB Superintendent of Business for his review.

The CDSBEO transportation department uses the Transportation Payment System in conjunction with the Mapnet routing system to prepare its KPI reports. The reports are regularly reviewed by the CDSBEO's Superintendent of Business.

Succession planning

The Consortium does not have a succession plan in place as the Member Boards have only recently approved to move forward with securing common leadership for the Consortium.

The UCDSB transportation department has a high-level succession plan that details ongoing professional development opportunities for each position.

The CDSBEO transportation department has not developed a succession plan.

Information management

The Consortium does not have information management policies in place, as the transportation departments abide by their respective Member Boards' information management policies.

Confidentiality agreements governing the use of student data exist, and they have been signed by all staff and all operators. All drivers must also agree, annually and in writing, not to release any confidential student information.

Operators must adhere to a "Standards of Performance" document, which details video camera guidelines. These guidelines require that operators seek written approval before using video cameras, and each transportation department abides by its respective Member Board's camera use policy before granting permission.

Declining enrolment

There is no Consortium strategy on declining enrolment, as each transportation department operates separately and independently prepares its own budgets and forecasts.

The UCDSB has a detailed plan outlining its strategy to address declining enrolment, with projected declines incorporated into its strategic and financial plans and forecasts. The UCDSB transportation department also communicates the possible impact of declining enrolment to its route planners regularly.

The CDSBEO does not have a strategy that explicitly focuses on addressing declining enrolment, as declining enrolment has not been significant for CDSBEO. On an annual basis, the CDSBEO transportation department is informed about CDSBEO's enrolment projections, to help determine if transportation routing adjustments are required.

3.4.2 Best practices

Documented Cost Sharing Agreement

The executed Consortium Agreement outlines the cost sharing mechanism for STEO. A documented methodology for cost sharing is a best practice to ensure accountability over costs and appropriate operational cash flow for the financial obligations of the Consortium. As operations are integrated, the cost sharing agreement will need to be implemented in practice.

3.4.3 Recommendations

While the Consortium has been formally established, it is a Consortium in name only and it is not functioning in the manner envisioned by the Consortium Agreement. The Consortium is encouraged to review the existing strengths and practices of its constituent transportation departments, and to then pick, implement, and customize (where appropriate) those practices that will best meet the needs of all of its stakeholders. The following recommendations are provided at a high level, and it is recommended that STEO review the expectations detailed in the Leading Practices Guide and in the recommendations provided to previously reviewed consortia.

Develop and execute transportation service agreements

The Consortium should have agreements in place with all parties to whom it provides services, including Member Boards. The transportation service agreements should include appropriate clauses – guidance on these clauses is provided in the Leading Practices Guide and in documentation available from the Ministry of Education.

Develop and execute purchase of service agreements / support services

The Consortium should have agreements in place with all parties from which it purchases services, including third party vendors and Member Boards. These agreements should have clear terms and conditions and should address how the Consortium will be charged for the services it is receiving. Additional guidance on these terms and conditions is provided in the Leading Practices Guide and in documentation available from the Ministry of Education.

Develop and implement procurement policies

The Consortium should have its own clear, documented, Governance Committee-approved procurement policies that define procurement methodologies with associated thresholds and approval requirements.

These policies should be regularly reviewed by Consortium governance to ensure alignment with the Ministry of Finance Supply Chain Guideline, the Broader Public Sector Procurement Directive, and the Broader Public Sector Expenses Directive.

Insurance

The Consortium should carry its own insurance and should have a process in place to regularly review and assess its insurance needs.

Develop and implement staff performance evaluation, training and management

The Consortium should develop and implement clear, Governance Committee-approved HR policies that provide guidance on the Consortium's approach to staff management, training and evaluation.

Staff training initiatives should be planned, documented and tracked on a regular basis and should promote continuous learning and professional development.

Staff performance evaluations should also be conducted on a regular basis with a clear, easily understood framework that is specific to the STEO and its needs. The metrics used should be supportive of the goals and objectives of the Consortium and should be clearly communicated to staff

Continue to implement long term and short term planning processes

The Consortium has developed a strategic plan. We encourage the Consortium to have the plan reviewed and approved by the Governance Committee. The plan should then be expanded to delineate the key activities required to achieve the proposed objectives in the envisioned timelines as well as identify the individuals that will be responsible for the activities.

The Consortium should also develop a clearly defined and governance-approved policy that formally outlines the process, structure, individuals and principles associated with long term and short term planning. It is also recommended that the policy incorporate procedures to monitor and report on progress against strategic goals and objectives at regular intervals.

Continue to implement processes to measure performance

The Consortium should regularly track and report on the KPIs it has developed, in accordance with its performance measurement policies. Changes above a pre-determined threshold should be investigated and reported upon regularly, and the Consortium should also work to track results over time (i.e., trending analyses) to identify longer term trends and patterns. With the culture of performance tracking

already established at both Member Boards and the indicators to be tracked already established, this recommendation should be fairly easy to implement once integrated operations are underway.

Develop and implement information management policies

The Consortium should develop and implement its own information management policies that are aligned with information and privacy legislation and leverage those currently used by the transportation departments. Compliance with such policies should be regularly monitored and procedures should be in place to manage situations of non-compliance. The Governance Committee should also regularly review legislation and industry information to ensure compliance with best practices.

Develop a strategy for declining enrolment

School enrolment across Ontario has been in steady decline over the last decade. Given that the Consortium currently serves some rural areas, and given the Ministry's 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. In particular, this strategy should focus on the financial impact declining enrolment is expected to have on the Consortium and should present appropriate mitigation strategies. Developing such a plan or strategy will provide the Consortium with a framework that will help it address funding issues and will also signal a proactive approach to dealing with issues before they arise – a key element of effective long-term Consortium management.

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

Each transportation department works with its respective Member Board to prepare a transportation budget. For each transportation department, the budgeting process is initiated by the respective Member Board and the transportation department works to forecast ridership, staff costs, transportation costs, and other items that impact the budget, such as fuel cost increases or new programs (e.g., GPS tracking).

Each transportation department conducts formal budget-to-actual reconciliations on a monthly basis, although informal reconciliations are done more regularly. The variances are compiled and reported on a monthly basis, to the Superintendent of Business. If material variances arise, the transportation department works to identify, understand and resolve the issues.

Accounting practices and management

Each transportation department follows the accounting practices and policies of its respective Member Board.

The CDSBEO transportation department does not receive operator invoices for regular bus routes – the CDSBEO transportation department requires the bus operators to submit statistical information that consists of mileage, riders, vehicle type and proof of vehicle age. The required variables are then entered into the Transportation Payment System (e.g., fuel costs based on the monthly fuel survey, fixed costs, variable kilometre costs), which generates a payment schedule based on the negotiated rates. Operator invoices for special education bus routes are received and are processed in accordance with the CDSBEO's accounting practices and policies.

The UCDSB transportation department receives operator invoices for regular and special education bus routes. The following procedure is used to process operator payments:

- At the start of the year, the office administrator inputs all variable rates, other than fuel, and all fixed costs into TRACS;
- Every month, the financial coordinator conducts a fuel survey of gas stations across the Board's geographic area to determine the applicable variable fuel rate (i.e., monthly fuel survey);
- The office administrator inputs the variable fuel costs each month, based on the monthly fuel survey;

- Every month, notification is sent to the operators that the monthly fuel costs have been updated in TRACS and that the operators can prepare their monthly invoices;
- The office administrator reviews the invoices by comparing actual costs to expected costs;
- The financial coordinator and transportation manager approve the invoices; and
- The invoices are submitted to the accounting department for payment.

Each transportation department also prepares invoices for services provided to other entities (e.g., the other transportation department, other consortia, etc). The invoices are typically prepared twice a year and are developed in accordance with the respective Member Board's accounting practices and policies. Payments between the two Member Boards are not netted.

Audit

Each Member Board is audited on an annual basis.

3.5.2 Recommendations

Budget planning and monitoring

The Consortium's budgeting process should be documented, governance-approved, and should detail the process, methodologies and people used to develop the annual budget. The development of the annual budget should include appropriate checks, balances and people in order to ensure the integrity and accuracy of financial projections. Ideally, the Consortium should implement a "bottom-up" budgeting process that starts with the detail of expected or desired costs and derives the overall budget from the detail.

The Consortium's budget tracking process should be documented, governance-approved, and should detail the timelines and reporting responsibilities delegated to Consortium management. In turn, Consortium management should also follow up on unexpected or unexplained budget-to-actual variances.

The existing budget planning and monitoring processes at each of the transportation departments is strong. The Consortium should leverage these practices when developing its own.

Accounting practices and management

Appropriate internal controls, policies, responsibilities, authorization levels, and reporting requirements should be in place and complied with to ensure that the Consortium has a proper financial control system. The Consortium is encouraged to review the existing strengths and practices of its transportation departments with respect to financial management, and to then pick and implement those practices that will best meet the needs of all of its stakeholders.

3.6 Results of E&E Review

This Consortium has been assessed as **Low**. Each department independently exhibits a number of the best practices that the E&E Review Team would expect from a Consortium. However, it is the duplication of the efforts of the Boards that contradicts the objectives of the E&E process by being neither effective nor efficient.

While acknowledging that a formal Consortium has been established, it is also recognized that the Consortium is not functioning in the manner envisioned by the Consortium Agreement. It is recommended that CDSBEO and UCDSB work to establish a Consortium that functions in the manner envisioned by the Consortium Agreement, while incorporating the recommendations prescribed throughout this report. After establishing a functional and integrated entity structure, the Consortium can then work to establish integrated management practices that eliminate much of the duplication currently in place.

The Consortium is encouraged to capitalize on the existing strengths and best practices of both transportation departments. The Consortium should review the existing practices of each of the transportation departments and pick, implement, and customize (where appropriate) those practices that will best meet the needs of the integrated Consortium. With a functioning Consortium in place, some additional contracts and agreements will be required to formally document services to be purchased and provided such as transportation services agreements. The expectations of consortia have been detailed in the Leading Practices Guide as well as through the recommendations provided in the E&E Reports issued to previously reviewed consortia. The Member Boards are encouraged to utilize these, and the other resources made available by the Ministry, as they move forward with this endeavour.

Working to integrate the Member Boards' respective transportation departments into a single, coordinated unit will require effort, dedication, and the support and cooperation of all stakeholders. In turn, this will facilitate the more effective, more efficient, and more equitable delivery of student transportation services that will help meet Transportation Reform objectives by alleviating the administrative burden on both Member Boards.

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 staff from each of the Boards, and on an analysis of presented documents, extracted data, and information available on the department's website. Best practices, as established by the E&E process, provided the source of comparison for each of these key areas. The results of the assessment are shown below:

Policies and Practices – E&E Rating: 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 along with 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

Guidance regarding service expectations and levels of services are established for each of the transportation organizations by their respective Boards. There are no joint policies that detail how a fully integrated consortium would be expected to provide service. This structure reinforces the individualized nature of each of the operations and has limited any opportunities to realize effectiveness or efficiency benefits from greater collaboration.

Prior to the E&E Review, staff from both Boards had collaborated extensively to begin the development of joint policies. This effort was discontinued as it became apparent that the remaining effort required coupled with a school opening would not allow for enough time to establish a document array that was consistent with the expectations of staff, or of the E&E process. This effort, while initially unsuccessful because it did not result in the development of a unified policy manual, should contribute to the longer term success of the Consortium. The work performed to detail and reconcile the differences in operating philosophy will provide a useful point starting point for future efforts to establish a unified operating construct.

Within each of the respective transportation operations, the scope of policies generally provides adequate guidance on service design and expectations. Eligibility criteria, alternative and courtesy services, bus stop placement, bell time considerations, and ride time guidelines have all been established under the auspices of the individual Boards. While many of these documents are similar in scope and detail, their Board-specific adoption results in interpretations that do not consider the implications of joint operations.

The lack of a single, consistent array of policy and procedure criteria formally detailing the operating expectations of a Consortium is inconsistent with the expectations of the E&E process.

Eligibility and walking distances

The harmonization of eligibility criteria as part of a greater effort to improve effectiveness and efficiency is a key philosophical component of the E&E process. It is expected that the Governance Committee of the Consortium will adopt harmonized criteria to provide clear guidance on service delivery expectations for a unified operation. Given that the operations of UCDSB and CDSBEO remained distinctly separate operations at the time of the review there were no Consortium policies regarding eligibility.

The table below indicates the Boards have established generally similar eligibility criteria for their individual operations. Each Board has posted their criteria on a transportation related portion of their respective websites and distributed these criteria to parents through student handbooks and other media.

Table 4: Distance to school and bus stop criteria

| Board | Region | Grades JK - 3 | Grades 4 - 6 | Grades 7 - 8 | Grades 9 - 12 | Walking Distance from Home to Bus Stop |
|--------------|--|--------------------------|-------------------------|-------------------------|--------------------------|---|
| CDSBEO | Stormont – Dundas - Glengarry | 1.0 km | 1.6 km | 1.6 km | 2.0 km | 0.6 km |
| CDSBEO | Prescott- Russell | 0.8 km | 0.8 km | 2.0 km | 2.0 km | 0.6 km |
| CDSBEO | Leeds- Lanark- Grenville | 1.0 km | 1.6 km | 1.6 km | 1.6 km | 0.6 km |
| UCDSB | All Regions | 0.6 km | 1.6 km | 1.6 km | 2.0 km | 0.6 km |

Alternate addresses

A Consortium will establish policy and procedure criteria related to allowances for alternative addressing as part of an effort to increase the flexibility and responsiveness of its operations. These allowances must be carefully managed and tracked so as not to introduce inefficiency or risk into regular operations. Articulating clear guidelines regarding when pickups from, or drop offs to, alternative addresses will be allowed is an important corollary to the establishment of eligibility criteria. At the time of the review, there was no distinct alternative address policy or procedure for STEO.

Each of the individual Boards has established procedures for alternative address allowances. The policies are philosophically consistent in many areas including the requirement that the pick-up and drop-off points must be consistent throughout the school year, the address is within the designated attendance area, the change can occur at no cost to the Board, and the bus route is neither altered nor extended.

The philosophical consistency should provide the Consortium with the ability to reconcile differences in implementation relatively quickly and adopt a single STEO policy for alternative addresses.

Courtesy transportation

Establishing a policy and procedure framework to manage the provision of services to otherwise ineligible students is an expectation of each Consortium. Defining the circumstances under which these students would be allowed to use existing school bus services is the responsibility of the Governance Committee in its policy setting role. Creating procedures to track, manage, and analyze the impact of services to otherwise ineligible students is the responsibility of Consortium management. Given the lack of a unified operation, STEO policies and procedures related to courtesy transportation have not been established.

Both Boards have established policies and tracking procedures for courtesy students. There are 1,143 UCDSB students and 1,132 CDSBEO students identified as receiving special permission transportation⁷. The procedures are again similar in their goal - to provide access to students without materially increasing the cost of transportation and require a regular revision of the allowances to ensure that they are not encroaching on services for eligible students. Establishing a unified policy would require that the Consortium reconcile previous interpretations of courtesy allowances by the individual transportation departments to ensure consistency and equity across the service area. However, the similarities in the goals and expectations of the current policies should allow for this type of reconciliation over a limited amount of time.

Bell time management

The time-dependent nature of efficient transportation services requires that the Consortium clarify when and how alternative bell times will be considered. A single STEO policy has not been established regarding bell time management. However, each Board has established expectations regarding bell time management in their respective policy and procedure documentation. While the specific scope of the individual transportation department's authority regarding bell times is expressed differently in each of the Boards' respective policies, each indicates that the transportation department is responsible for providing options for improving the effectiveness and efficiency of service delivery. Neither of the procedures indicates specific timelines on when options have to be presented or how outside stakeholders (e.g., schools or

⁷ Special permission includes courtesy students, student receiving bussing from two addresses, out of zone transportation, and students attending schools under a right to attend provision. Therefore, not all 1,132 may be considered traditional courtesy students.

administration) can petition the transportation department for changes. Given the Board-centric nature of current operations, these issues have been previously reconciled through informal processes at each Board. Greater detail on process expectations and timelines will be required in order to establish a unified approach for the Consortium.

Student ride times

The establishment of student ride time guidelines provides the Consortium with a critical planning constraint related to the design of the routing scheme. While no single STEO policy has been established that provides ride time guidance, the respective Boards and transportation departments have developed policies indicating that 60 minutes is the target maximum ride time. Each Board also indicates that French Immersion students may be required to ride longer than the target due to the large service areas. Currently, approximately three percent of students from each Board ride longer than the target. The nearly identical language of the Board policies and the similar service characteristics should allow for the development of a unified STEO ride time policy in a short period of time.

Route planning schedules and strategies

Route planning and design is performed independently at each of the Boards without explicit consideration for integrating the systems. However, informal collaboration between the route planning staff from each Board does occur throughout the school year, but particularly during the annual planning process. As staff from each Board completes its annual efficiency review, notice is provided making the other Board aware of slack resources that may be available. The goal of this process, as indicated in interviews, is to more fully utilize buses and minimize single bus runs where possible. While these are admirable efforts on the part of staff and illustrative of the type of collaboration that could occur in an integrated system, the impact has been limited. A total of only eight routes are shared between the Boards, out of a total of nearly 2,000 routes.

Hazard transportation criteria

Hazard transportation criteria are established to provide the transportation operations with guidance on when otherwise ineligible students can access bus services or when exceptions to established criteria are allowed due to conditions deemed to be inconsistent with the safe movement of students. The criteria should provide guidance on what situations can be considered hazardous, the criteria for determining if a hazard exists, a mechanism that records the establishment of the hazard and the underlying rationale relative to the established criteria, and a timeline that details when the conditions will again be assessed. A draft STEO procedure for hazard assessments

was in development but had not been adopted at the time of the review. Currently each Board relies on its individually adopted hazard policies to provide its transportation department with guidance.

Existing hazard procedure review and documentation is almost identical between the Boards. Each requires consideration of items such as railway crossings, overpasses/bridges, student age, the count of students at a stop, road shoulder conditions, road conditions and speed limits, and traffic volume. The procedures are also nearly identical in their requirement to establish a hazard polygon in the routing software and ensure that student coding identifying the hazard is properly updated. A total of 409 students from CDSBEO and 250 students from UCDSB are identified as residing within a designated hazard area.

There are likely to be differences in how each transportation department has interpreted the hazard policies set by their Boards. Therefore, implementation of a unified STEO policy will likely require a significant effort on the part of the Boards and the transportation departments to establish a single set of criteria for hazards. Expanding the draft hazard policy to more clearly articulate the specific criteria that could create a hazardous condition will ensure equity across the service area.

Bus stop placement

There is no STEO policy or procedure related to bus stop placement. However, both Boards have established procedures for locating and evaluating bus stops. The level of detail in the individual procedures is significantly different, but their intent is clearly consistent. Each of the procedures focuses on the adequacy of sight lines and the appropriateness of road conditions in the immediate area.

The draft STEO procedure for assessing stop locations provides an excellent example for both this aspect of the operation and the hazard criteria considerations mentioned previously. The procedure clearly establishes a set of criteria and a scoring mechanism to assess each stop location. The criteria and the associated documentation will promote consistency in the review of stops across the service area. This will help assure stakeholders that they are being treated fairly and equitably by the Consortium. In addition, the procedure clearly indicates that the professional discretion of staff will be used to rationalize all decisions regarding stop placement. This type of approach is consistent with E&E best practices and would be an excellent model for the development of a hazard area assessment procedure.

Decision appeal process

Given that all service decisions are made by the individual Boards, there is no unified appeals process for the Consortium. Within CDSBEO there is no defined appeals

process. However, this does not limit the ability of any student or parent from petitioning the administration or Board to remedy the situation as part of the regular Board processes.

UCDSB has established a formal appeal procedure that includes a review of the concern by a Route Planner with escalation to the transportation manager and finally the Superintendent of Education. The approach presented in this procedure, including necessary documentation requirements and response timelines, are consistent with best practices identified during the E&E process. This document would serve as a useful starting point for the establishment of a STEO appeal process.

Inclement weather procedures

The Boards and transportation departments have collectively established a unified inclement weather procedure. The detailed procedure statement includes process flow charts and communications protocols to promote consistent decision making across the service area. The decision to subdivide the service area into distinct weather zones is a recognition of the different weather patterns affecting the region. The joint development process, coupled with the specific expectations detailed in the procedure, is consistent with best practices identified during the E&E process.

4.2.2 Best Practices

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

Inclement weather procedure

UCDSB and CDSBEO have established an excellent procedure to guide inclement weather decision making. The unified development approach promotes consistency for parents, students, and bus operators and is emblematic of the service delivery practices of the consortium approach to service delivery. Additionally, the establishment of inclement weather zones is a reasonable and considered approach to the potential for varying conditions across the service area.

4.2.3 Recommendations

Development of a harmonized policy manual

Establishing a unified approach to service delivery is a critical component in establishing a single identity for STEO. The unified approach to service as presented in the policy and procedure manual will become the key mechanism that will allow staff from the individual Boards to adapt to and adopt the expectations of STEO. Expectations and

guidance are best expressed in a single set of clearly articulated policies and procedures. This manual should fully describe the expectations of the Member Boards (through the policy statements) and how the Consortium will implement the policies (through the procedure statements). STEO must complete its previous efforts to establish its policy and procedure manual in order to fully realize the effectiveness and efficiency benefits presented by the Consortium.

As has been indicated throughout this section, many of the service requirements and procedures are nearly or fully identical between the Boards. This consistency provides the baseline necessary to harmonize critical planning policies (i.e., eligibility for services, walk to stop distances, student ride times, etc.) and organizational procedures (i.e., hazard area designations, bus stop locations, courtesy transportation, etc.) without significant disruption to either operation. Reconciling previous interpretations of policy and procedure and establishing a unified approach to implementation across the Consortium is likely to require the most significant effort in the short term.

4.3 Special Needs Transportation

4.3.1 Observations

Planning transportation for special needs students can present additional challenges as one must consider not only time and distant constraints, but also the physical and emotional needs of each individual student. Additional factors to consider include equipment needs such as wheelchair lifts, special restraints or harnesses and medically fragile students who require assistance or medical intervention. Policies specific to the transportation of special needs students are essential to ensure that transportation meets each individual student's needs and is provided in the safest manner possible.

Special needs policies and planning guidelines

Recognizing that different expectations and procedures could create confusion for bus operators and may result in service difference or disruptions for students, the Boards collaborated to ensure that expectations for service delivery and information transfer were clearly defined. These expectations are documented in individual Board procedure statements and/or communications to the parents of special needs students. This is another example of positive collaboration between the Boards for the purpose of ensuring equitable service delivery to all students.

Each transportation department has established a structure that designates special needs transportation as a unique planning function. Each department has designated individuals to be responsible for the management of student data, route planning, and incident management. Neither Board has made extensive use of mainstreaming for

special needs students, or the provision of service to regular education students on special needs buses due to concerns about program times. Additionally, the Boards use different technology to manage special needs student data (the different technologies have both been developed by Trapeze Software, Inc., which also provides the primary routing software to the Boards). The processes used by the individual planners are not substantially different though they are focused on the needs on the individual Boards. Due to the individual focus of each Board, there is limited sharing of resources between the Boards.

The processes at each of the Boards are different but adequate for their individual needs. However, as the Consortium transitions to a single operating entity it will be necessary to reconcile issues of technology selection, data transfer and communications in order to ensure that service delivery standards continue to be met.

Driver Training

Training services have been defined jointly by the two Boards through the Standards of Performance document and the service agreements. These requirements include the provision of training to ensure drivers are aware of the behaviours of students with particular special needs in addition to other basic behaviour management requirements, training on service expectations, safety, CPR, and First Aid. Joint development of training expectations and standards of performance are consistent with the philosophy of the consortium approach in that it reinforces consistent and equitable service to all students.

4.3.2 Best Practices

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

Training and service expectations

The Boards have jointly established training expectations and defined service requirements that clearly articulate an expectation of consistent service for all students within the Boards.

4.3.3 Recommendations

Establish a harmonized approach to special needs planning and management

While many of the processes used by the individual departments are similar, the continuation of Board- specific planning activities is preventing each Board from realizing efficiencies in routing practices. Establishment of a unified planning structure under STEO would allow special needs planners to evaluate opportunities to share resources between programs that are currently not available to Board planners. In addition, a unified planning approach would allow each Board to consider planning constraints such as program times in the context of improvements to effectiveness related concerns such as student ride times. The unified planning approach is likely to result in both a reduction in the number of resources required and opportunities to improve services to students.

4.4 Safety policy

4.4.1 Observation

Ensuring student safety is the foremost goal of any transportation organization. In support of providing safe transportation, it is imperative that clear and concise policies, procedures, and contractual agreements are developed, documented, monitored, and enforced to ensure that safety standards are understood and followed without exception. The bus operators are contractually required to provide safety related training to its drivers and are also mandated to provide programs to the schools including the First Rider Program, vehicle evacuation drills, and bus patroller.

Student training

Training students on bus safety procedures is a joint activity between the Boards that is managed separately. Curriculum for the training programs including Buster the Bus, First Rider Programs and bus evacuations are developed in conjunction with bus operators to ensure consistency in the implementation. Each Board has developed administrative methods to track the provision of training to ensure that each program is being delivered in a manner consistent with both service expectations and contractual requirements. CDSBEO also developed a walking school bus program that is targeted at increasing both safety awareness and physical activity of non-bussed students. UCDSB has also started a limited implementation of a bus patroller program at one school and is considering an expansion of the program.

The redundant administrative requirements associated with the independent oversight of the training programs are a limited but illustrative example of the organizational

inefficiencies associated with the continued independence of the two operations. The joint development of the programs and curricula are examples of the way in which consortia can bring consistency to service practices for all students.

Driver training

For both Boards, training expectations are established in their individual Transportation Agreements and the joint Standards of Performance document. The language of the agreements is different but both indicate that the following aspects must be provided at the request of the Board in school bus safety: pupil discipline, building positive student behaviour, special needs training, human relations, defensive driving, First Aid, CPR, use of fire extinguisher, traffic laws, applicable Board policies and regulations and behind-the-wheel school bus driving instruction. The Standards of Performance dictates a requirement for bus evacuations and EpiPen use and training in First Aid and CPR. Given the shared nature of the operator pool, the establishment of what are effectively joint criteria is a reasonable approach to ensure service equity across the region.

Accident and incident procedures

The primary procedural directive related to accident/incident management was jointly developed by CDSBEO and UCDSB. This procedure, and the associated reporting forms, enhance already excellent existing documentation and create consistency for operators serving both Boards. Of particular note is a clear definition of incident versus accident in order to ensure that the proper protocols are followed. The procedure establishes expectations for all stakeholders who may be party to an accident or incident. Both departments have also developed procedures that provide a summary of the tasks to be completed in response to other likely events the department will confront such as a missing student or a student who is not met at the bus. The array of procedures and particularly the accident and incident documentation are consistent with best practices identified in the E&E process.

Auditing procedures

The joint Standards of Performance document and procedures provides for an extensive audit protocol for operators. These protocols include facility audits and route audits by transportation planners at each of the Boards. The expectations of the audit include a comprehensive review of maintenance activities, documentation, safety practices, and driver training. Procedures are established for reviewing the results of the audits with bus operators as part of their annual review and to develop joint remediation plans. This approach to operational auditing is consistent with best practices identified during the E&E process.

Use of cameras

While there is no single policy or procedure in place between the Boards, actual practices are very similar. Buses are equipped with cameras on an as needed basis. Parents and students are made aware of camera use through documentation provided by the individual Boards and on Board websites. The notification language used by the Boards is virtually identical. The joint Standards of Performance document details the expectations of operators and how video from the cameras will be used and stored. This is another example of highly similar, yet separate procedures that can be quickly transitioned to a unified STEO approach.

Maximum age of vehicles

Despite the sharing of some operators and vehicles between the Boards, there are different expectations regarding maximum vehicle ages between UCDSB and CDSBEO. Guidance regarding vehicle age is provided in the Transportation Service Agreement at CDSBEO and in the rate schedule attached to the Transportation Service Agreement for UCDSB. The table below summarizes the expectations for vehicle age by seating capacity.

Table 5: Maximum Vehicle Ages

| Vehicle Size | CDSBEO Maximums | UCDSB Maximums |
|---------------------|-----------------|----------------|
| 72 seat vehicles | 11 | 12 |
| 30 seat vehicles | 11 | 12 |
| 20 seat vehicle | 11 | 12 |
| Wheelchair vehicles | 11 | 12 |
| Minivans | 10 | 9 |

Even subtle differences such as these have the potential to create confusion for bus operators and in essence force the operators to use the lowest common requirement between the Boards if vehicles are to be shared. This issue relates directly to differences in the common contract used by the Boards as detailed in Section 6.2.3.1 of this report.

4.4.2 Best Practices

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

Accident and incident management

The development of a unified procedure for accident and incident management and the establishment of highly informative documentation requirements support both the risk management and analytical responsibilities of the Boards related to accident and incident management. This unified procedure will be available for immediate use by STEO following the establishment of a single planning and management entity.

Audit procedures

The comprehensive process used for facility and route auditing developed by the transportation departments is an outstanding example of contract oversight procedures. The varied aspects of the review are a highly effective and proactive measure to promote safety and consistency among the operators used by the Boards. However, greater efficiencies can be reached by integrating the audits currently conducted separately by each Board.

4.4.3 Recommendations

Vehicle age reconciliation

As part of a broader effort associated with creating a single contract for STEO (please see Section 6.2.3.1), differences in maximum and average vehicle ages should be reconciled. This will ensure that operators have consistent expectations for vehicles used within the same service area.

4.5 Results of E&E Review

Policies and Practices have been rated as **Low**. The continued independence of the operating practices at the Boards is inconsistent with the expectation of the E&E process. While there are a number of jointly developed documents and practices and an even greater number of highly similar practices, the operating paradigm remains one of independence. This independence creates inefficiency in administrative practices by requiring the development of redundant management and administrative capabilities. In addition, the separation of operations prevents the analysis of how limited changes to policies or practices would allow one or both Boards to realize savings or service improvements.

Subsequent to the full creation and implementation of STEO an immediate requirement will be the development of a unified set of guiding documents. The significant efforts already undertaken to begin the development of joint policies and procedures, coupled with the consistency of many operating practices should allow STEO to quickly

transition to the use of consistent service expectations and practices for all students at the Member Boards.

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: 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 but 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 allow for more effective use of staff time and supports timely communications, 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 includes an examination of the desired expectations and outputs of the system to support comprehensive analysis and reporting. This section of the evaluation evaluates the acquisition, setup, installation, and management of transportation related software.

5.2.1 Observations

Routing software & related technologies

CDSBEO and UCDSB use a number of similar technologies and products as part of their management of transportation services. Each of these products is independently owned and managed by the Boards resulting in duplication of effort and increased cost. Establishment of a single transportation management platform that includes routing software, communications systems, reporting technologies and management will increase efficiency of data management and reduce the total cost of systems management. The following is a brief description of the technologies and software used by each department.

- UCDSB uses an array of products to manage routes and communicate with stakeholder groups. *MapNet* from Trapeze Software, Inc. is the primary product used for routing regular education students. *VEO*, also from Trapeze, is a relatively new product to the department used for managing special circumstance routing. Special circumstance trips include special needs students and temporary services being provided by the Board. *SchoolSeeker* and *TRACS* from Interloch Systems are used to provide parents with access to school site information and for schools and operators to obtain bus route information, respectively. Automated vehicle locating technology from Everywhere Solutions is used to obtain real time information on vehicle status and location. Two versions of the product are in place. The first is more limited and provides the actual location and status of buses through reports and maps. This is used mostly by bus contractors and other managers outside of the transportation department (i.e., from CDSBEO). A more functional version that allows for an analysis of planned and actual routes and any deviations and allows for monitoring speeding and known events (e.g., arrival at stops and engagement of the stop arm) is used mostly by UCDSB transportation staff. In addition, the GIS Administrator uses the boundary planning module from *MapNet* and *ArcView* from ESRI to manage mapping information. The transportation department has also established a designated website that provides information on policies, operating procedures, and service level expectations. The site also has links to the other software products that allow for a lookup of school assignments and bus stop locations.
- CDSBEO also uses *MapNet* as the routing software for all students. *MapNetWeb*, also from Trapeze Software, Inc., is an Internet-based communications tool that provides a secure portal for school and operators to receive changes to routes. The department has also established a website to distribute most information to stakeholders including notification of delays and cancellations, Board policy, departmental procedures, inclement weather process

descriptions, and a school and bus stop/route finder (a secure component of *MapNetWeb*). The department has also taken advantage of social media tools such as Twitter to distribute information. In instances where buses are shared between the Boards, CDSBEO also has access to the AVL information available through Everywhere Solutions.

Maintenance and service agreements

Both organizations have established appropriate maintenance and service agreements with each of their software vendors. In both cases the agreements provide for user manuals, software patches and upgrades as appropriate. Both organizations pay individually for the services based on their established licensing agreements.

System backup and disaster recovery

The lack of an integrated system within STEO requires that each Board maintain its own procedures to ensure system data is available and properly managed. Each of the current processes is briefly described below:

- At CDSBEO, a formal Memorandum of Cooperation has been established with the Board's IT department to address technology management. Full nightly backups of all transportation technology are conducted to an off-site server. The process has been used in both a testing and live environment to restore data. It has been determined that restoration of services can happen within an acceptable time frame. The implementation approach (using third party middle ware) allows for remote access to the routing software from multiple locations in the event of an incident that limits access to either of the two transportation offices.
- UCDSB has worked with its IT department to establish a progressive backup system for all of the transportation-related software products. The procedure establishes a weekly, monthly and daily incremental backup for all key systems. The servers are housed in a secure facility that is managed through keypad and electronic identification access. Provisions have also been made to provide for remote access to key systems in the event of an incident that limits access to the department's office. Off-site storage is also provided. The procedures have been tested and found to be adequate.

These procedures provide a clear definition of the expectations and requirements for each department and ensure business continuity to address most incidents that could disrupt departmental operations. Establishment of a business continuity and data

management procedure will be an early requirement for the organization once a unified approach to systems is established.

Staff training

CDSBEO has used *MapNet* for an extended period of time and staff have received multiple vendor provided and in-house training sessions on all aspects of system use. This training has also included the development of targeted user manuals that have been customized to how CDSBEO uses the software for planning. Training was reported as being regularly available and, importantly, customized to addressing the needs and concerns of route planning staff.

UCDSB has also been a long time user of *MapNet* as the primary product for managing regular home-to- school routes and recently added *VEO* for special circumstance trips. In addition, automated vehicle location software and technology (AVL) from Everywhere Solutions has recently been incorporated into departmental operations. Training on system use has been provided on a regular basis for all systems using a combination of in-house and vendor resources. Of particular note was a requirement for five days of training when *VEO* was acquired and a similar requirement as part of the implementation of the AVL technology. Interviews suggested that the Transportation Manager was highly responsive to training needs and requests.

Given that STEO does not operate as a single entity, each Board has established its own training routines for the array of software and technologies used within the departments. It should be noted that many of these products are the same, but that training is generally provided exclusively to an individual Board. As with other aspects of the independent operations, there are redundancies in training requirements and costs that will be remedied when a unified planning organization is established.

5.2.2 Best Practices

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

Technology use to support route monitoring

The use of automated vehicle locating technology is becoming an increasingly useful management tool for transportation operations, particularly transportation operations that are spread over a large geographic area. The evolving protocols related to using the AVL technology to support route monitoring and auditing has greatly enhanced UCDSB's ability, and, by extension, will enhance STEO's ability once all operations are amalgamated, to evaluate operator performance and to identify opportunities for improvement. The ability of the technology to provide data that allows for regular

assessment of oversight concerns, such as planned versus actual routing and analysis of on time performance in a manner that is vastly more efficient than if staff were to try to collect this data, will result in the identification of efficiency opportunities that would have otherwise gone unnoticed.

5.2.3 Recommendations

Establish a unified technology plan for STEO

A critical initial task for STEO will be the assessment and reconciliation of the various technologies used by the individual departments into a unified technology plan. The commonality of the base routing software will certainly ease the transition, but considerable deliberation must be given to the use of related technologies and software such as the AVL, *TRACS*, *MapNetWeb*, and *VEO*. Given that there is clear redundancy in some of the products, eliminating some of the products will result in marginal cost reductions but these reductions will not come without short term investments required in training. While each product has been brought into the individual departments because of a perceived benefit, it will be necessary for STEO to determine if the unified organization would benefit from one, some combination, or all of the available products.

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 used by both UCDSB and CDSBEO is a shared resource that is jointly managed. UCDSB recently acquired a revision to the Ontario road network through the Ministry of Natural Resources and had that map converted for use in both *MapNet* and *VEO*. The GIS Administrator at UCDSB prepared the base map, which was then shared with CDSBEO. Both organizations have established procedures for identifying concerns related to map accuracy including missing or new streets, road speeds, and travel conditions. The collaborative relationships established by the staffs at both Boards have allowed for a reconciliation of these concerns through regular, informal communications. As a result, it has been possible to institute a more regular update of the digital map.

STEO has informally established administrative procedures for map management based on an amalgamation of the individual practices at each Board. As with other aspects of the operations, however, many of these administrative practices are redundant and overlapping. If not for the positive working relationships established between staff that allow for some concentration of responsibilities it is likely that the overlap would be even greater. Efforts to establish a single, unified procedure and document the practice as applicable to the Consortium should continue.

Map accuracy

The accuracy of the base map has two fundamental components: can all of the students be located on the map? And, once located and routed, do the bus stop times and route times reasonably align with actual operations? In the first instance, the accuracy of the map is very high. Evaluation of both departments match rate, or the number of students accurately matched to a map location, were both greater than 99 percent. This rate is reflective of the recent efforts to more frequently update the map as streets are added or changed across the service area. It is also a reflection of the informal collaboration established between the Boards which promotes accuracy of house address ranges across particular street segments.

In the second instance, there are perceived differences about map accuracy. Despite the fact that the base map is exactly the same in both Boards, interviews indicated a perception that one Board had a more accurate map than the other. The perceived difference is attributable to an inability to more fully calibrate map characteristics and different administrative practices at the Boards. A unified planning structure with a single set of map management and administrative protocols would remedy any difference in inter-Board accuracy.

Default values

Under the procedures established by the two Boards, management of the default values is the primary responsibility of the GIS Administrator at UCDSB. The lack of a centralized planning operation has prevented any detailed management of the map values due to concerns about disrupting route times across the two departments. As a result, the focus has necessarily been on ensuring that the road network is current and that macro-level values have been established. These macro-level values have primarily focused on establishing major road type categories. Micro level fine tuning of the map, including the adjustment of street speeds, the identification of no travel zones, and creating turn penalties to guide automated route designs have been left to the individual departments. This has led to a situation where the same road segment may have different characteristics that are Board dependent. In addition, this situation has led to perceived differences in the accuracy of bus stop and route times between the

Boards. The lack of a single map that has been adjusted to allow for equitable service across the entire area is inconsistent with the expectations of the E&E process.

Student data management

Given that there is no single planning operation, there are no STEO procedures associated with student data management. Each Board has independently established procedures to update student data, verify revisions to the routing scheme as a result of student data changes, and notify the associated stakeholders of the outcome of the changes. Each process is described briefly below.

- UCDSB has established a fully automated, daily update of student data to the primary *MapNet* system with, at the time of the review, a manual update of student data in the *VEO* system for special needs students. Following a review and determination of how to address any changes by the Route Planners, changes are posted to the *TRACS* for operators and schools to obtain. With the exception of the more complex changes associated with special needs students there is very little manual processing of updates or notifications at UCDSB.
- CDSBEO has established a primarily manual system that includes the printing of a student data change sheet in the transportation office. The information from the sheet is either entered or updated by the Transportation Clerks who then determine the most reasonable and efficient routing strategy. Subsequent to making the changes, information is posted to the *MapNetWeb* messaging center for both the operator and the schools. Updates back to the CDSBEO student information system occur electronically without any intervention on the part of transportation staff.

While the current procedures are generally adequate for each of the individual Boards, the development of a single planning organization within STEO will require changes to one or both Boards' procedures in order to allow for the efficient flow of information between the Boards and the Consortium.

Coding structures

As has been mentioned, both departments use *MapNet* as their primary routing system for regular home- to-school operations. CDSBEO also uses *MapNet* for the management of special needs routing while UCDSB has recently transitioned to another Trapeze Software, Inc. product, *VEO*, for special needs transportation management. Despite the commonality of the systems and the base map data, the coding structures used to identify students, bus routes, trips, stop locations, and virtually every other key indicator in the systems is unique to the respective operations.

A critical component of creating a unified STEO planning operation will be the establishment of a single coding structure that will be used across both organizations. Given the historical differences in how the two organizations have used data for reporting and analysis, the establishment of a single structure will require careful consideration. Immediate consideration should be given to these concerns given the critical nature of these base tables.

5.3.2 Recommendations

Data management

The establishment of a single planning organization with STEO will require significant changes to current data management practices. Recognizing that each organization has established adequate practices to support their individual needs and that the staff of the organizations have made substantial efforts at formal and informal collaboration, creation of a single dataset to support all planning will be a fundamentally different operating paradigm. An assessment of current responsibilities and authority within the two organizations must occur to establish the scope of responsibility for each aspect of data management in the unified organization. Immediate requirements will include:

- Identification of the system or systems that will be used to manage route design and data distribution for all students.
- Delegation of all map management responsibilities including more detailed calibration of map characteristics.
- Creation of administrative procedures to address concerns regarding route timing and how those times are impacted by underlying map characteristics.
- Development of a unified approach to student data management.
- Establishment of a single coding structure associated with critical datasets such as students, schools, bus stops, bus routes, and bus trips.

Completion of these tasks is necessary before any effective use of a single planning system can be accomplished. Consequently, these efforts need to be an immediate focus for STEO management and governance.

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 communicate 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

Common reporting expectations and formats have not been established for STEO. Each of the departments has an established culture of data analysis and reporting that is specific to its individual needs and Board's expectations. An array of KPIs used as part of the joint Standards of Performance document in addition to invoice management are two common areas of reporting and data analysis. In addition, both Boards follow similar analytical practices during the annual planning process. During this time, the individuals responsible for route design at each board focus intently on capacity management with the goal of maximizing available seat use within each contractual obligation that has been established. Consideration is also given to route distances to assess the trade-off between the number of buses used and minimum contractual thresholds for kilometres traveled. The predominance of the remaining analyses are conducted on an ad-hoc basis to address specific concerns within each department.

The technology in place to report out to each stakeholder group is different between the Boards. CDSBEO uses *MapNetWeb* for the majority of its internal and external reporting requirements. Each school, operator, and parent has access to different aspects of the transportation data using a login and password combination. UCDSB uses *TRACS* as its data distribution tool to the same types of stakeholder groups. As has been mentioned, the administrative requirements to update these systems are different between the Boards as is the format of the output. This is again an example of redundancy in both systems and costs attributable to the independence of the two operations.

The system coding structures and reporting procedures are adequate for the individual use of each Board. However, the current differences in coding structures, reporting practices and technology will be inadequate and inefficient in a unified planning organization. Therefore, efforts must be made to define the types and frequency of reporting requirements for each stakeholder group.

5.4.2 Recommendations

Establish a common approach to the analysis and distribution of data

Thematically, this recommendation is similar to others that have been in this section of the report. In order to reduce the redundancy in technology and effort that is currently present in the two departments, efforts must be made to create a unified approach to the analysis and distribution of data. Implementation of this recommendation will require all components of STEO (governance, management and administration) to assess the variety of systems in place and determine which will best support the activities of a single organization. In addition, substantial effort will be required to detail the analytical expectations and capabilities of the operation to ensure that Board Trustees, Board administrators, parents, operators, STEO staff, and the Ministry of Education are able to access an appropriate array of transportation data.

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

Bus route management

There is no unified planning organization within STEO, so each Board is required to maintain individual planning groups responsible for the establishment and management of bus routes. Structurally and functionally the organizations are very similar as is described briefly below:

- Each department has been subdivided by both function and geography. The functional divide is between regular education and special education students, with each department having individuals that specialize in route planning for these groups. The geographic divide in both departments is based on families of schools within specific areas. Additionally, both organizations also have multiple offices that are essentially geographically aligned based on eastern and western portions of the service areas.
- Within each department, the individuals responsible for route design have autonomy within their regions to perform virtually all functions related to route management. Changing stop locations, student assignments, route assignments, and route design are all common components of the job requirements.

Additionally, each department has established clear lines of authority that require the respective departmental directors to approve changes that will result in cost increases to the organization.

- The guiding principles for route design are similar in each organization. The primary goal is to maximize the use of existing seating capacity with the designated obligations established within the individual transportation agreements. An important, but secondary, concern is to assess the impact of minimum kilometre thresholds on route costs. After routes have been designed, both organizations attempt to pair routes together into trips as part of an effort to maximize the use of each asset. In the event that a bus can only have one route within either Board, planning staff make ad-hoc efforts to notify the other Board of the vehicles' availability.
- Daily administrative and management responsibilities of route planning staff are similar. Evaluating routes changes based on updated student data and feedback from operators and the conducting ad- hoc analyses make up the bulk of these efforts.

The similarity of responsibilities and expectations should allow STEO to establish the scope of responsibilities for route planners in the unified organization in a timely manner.

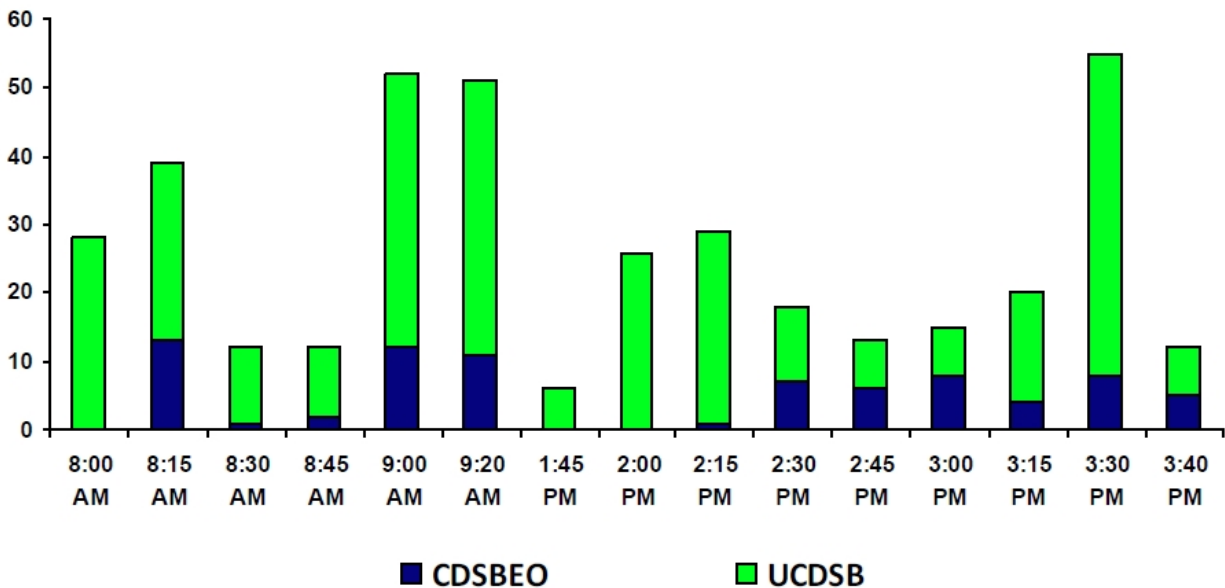
Analysis of system effectiveness⁸

Collectively, the service area covered by the UCDSB and the CDSBEO encompasses over 12,000 square kilometres. Using over 40 different operators and nearly 2,000 individual bus routes per day the two transportation departments provide services to over 35,000 students to over 150 locations. The nearly complete independence of the individual department's operations makes it nearly impossible to make a definitive statement about the consortium's overall effectiveness or efficiency. Consequently, it is necessary to evaluate the individual operations recognizing that many of the efficiency opportunities possible through shared operations will not be present.

Given the large service area, bell times are a primary consideration in the departments' ability to reuse assets as part of any efficiency strategy. The figure below demonstrates a distinct clustering of school start times that is having an impact on the ability of both Boards' ability to use a tiered routing strategy.

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 differences in the timing of the data collection.

Figure 6: Bell time distribution



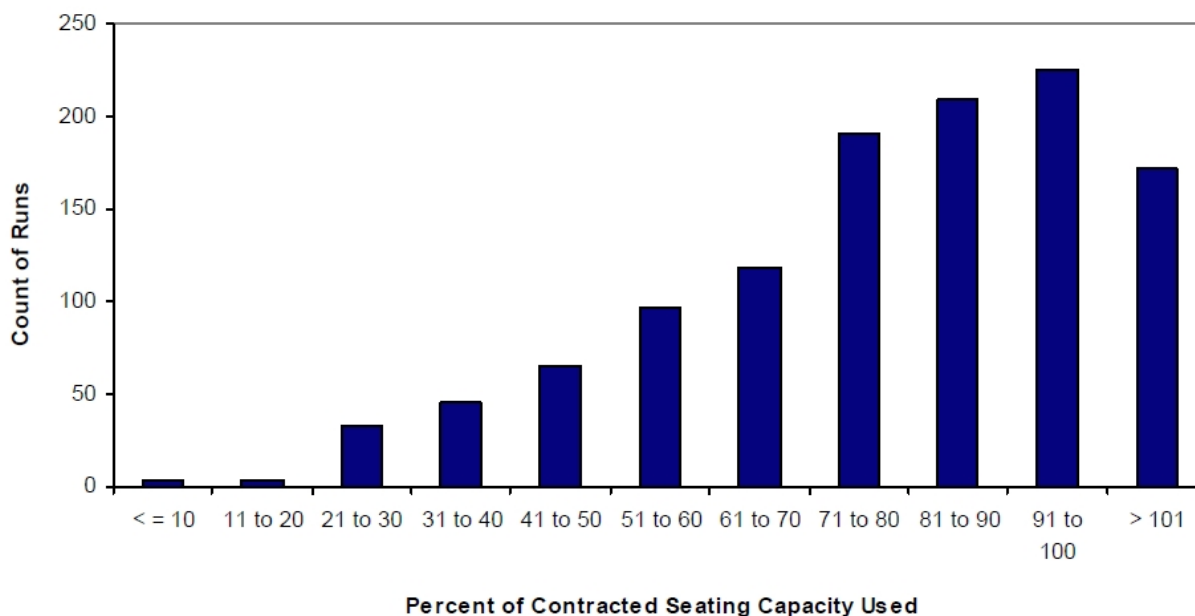
The graph shows that over 60 percent of all school start times are at or after 9:00 AM and more than 45 percent of schools end after 3:15 PM. The greater dispersion of UCDSB times has allowed that department to pair 70 percent of bus routes into trips, while CDSBEO has tiered approximately 20 percent of its runs. As a result of these constrained bell times, CDSBEO has used a strategy of combination route (where a single bus services multiple schools on the same bus route). Of the non-tiered runs in the CDSBEO inventory, over 30 percent are combination runs, with the remaining runs serving one school. At UCDSB, 60 percent of the non-tiered runs are combination runs. Overall, these statistics indicate that the departments are using a range of available routing techniques to address the fundamental constraint imposed by the current bell schedules.

What cannot be determined with absolute accuracy from the current route data is the degree to which integrating bus routes between the Boards would reduce the number of buses required. However, even a limited review of the data certainly indicates opportunities for additional trip integration between the Boards at a minimum. For example, there are 34 UCDSB routes that are not part of a tiered structure that complete their runs by 8:00 AM. It would seem likely that these units could, at a minimum, support 9:00 AM or 9:20 AM schools at CDSBEO. Using UCDSB buses with early routes that are currently not tiered to support the later start times of the CDSBEO routes is a limited example of the opportunities that might be available. The full spectrum of these opportunities to further integrate runs will not be apparent until all student and route data is resident in one system.

Consideration of seating capacity use at the Boards requires a slightly more nuanced analysis than may be typical due to the contract structure in place. The underlying number of seats available (the denominator in the capacity use calculation) is actively managed by route planners from both Boards given the construct of the current contract. For example, a 72 passenger vehicle being used on a route with 54 or fewer students is considered to have only 54 seats. As a result, the number of unused seats on any given bus may be understated in fact, but appropriately designated per the contract. Therefore, any comparative analysis of these results to other entities that do not use this methodology must be considerate of this factor.

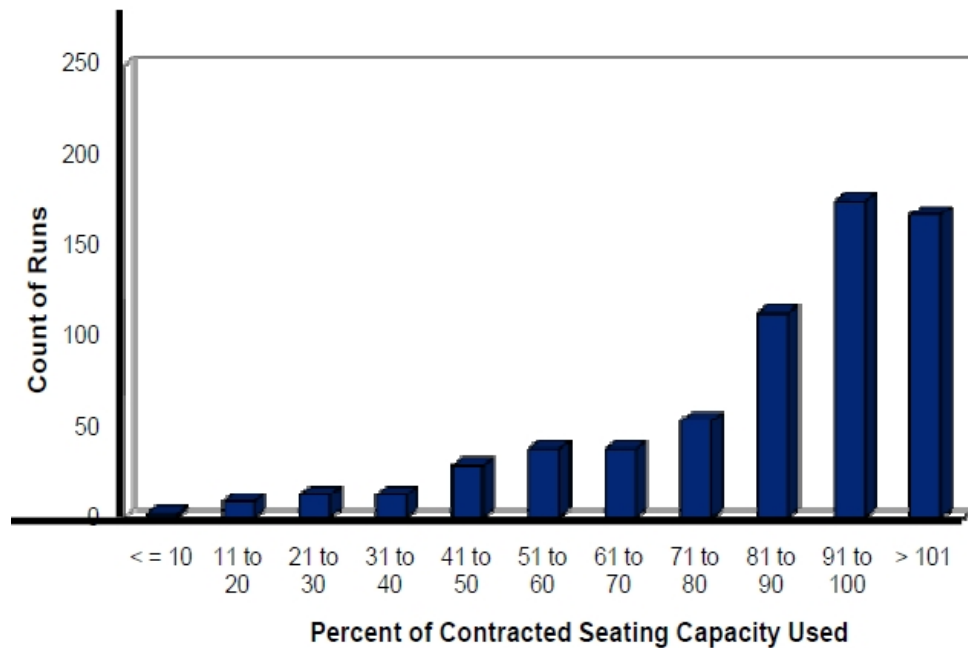
At UCDSB, the overall rate of capacity use is very high at 80 percent on average. This is somewhat due to a significant number of bus routes that have loaded capacity rates greater than 90 percent of available seating capacity (more than one-third of the total are greater than 90 percent and 15 percent of the total are more the 100 percent). The chart below shows capacity use values in ten percent increments based on contractual seating capacity for UCDSB.

Figure 7: Seating capacity use at UCDSB



Capacity use rates at CDSBEO are also very high at 87 percent overall. Overloading of runs is also a common practice at CDSBEO with 30 percent of all runs loaded at more than 100 percent of available seating capacity. The following chart shows the capacity use values in ten percent increments based on contractual seating capacity for CDSBEO.

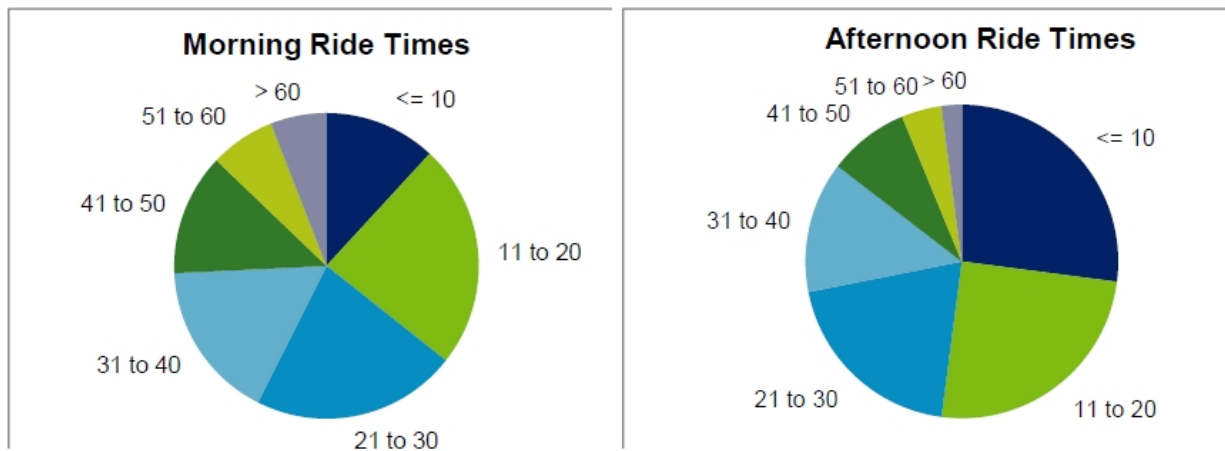
Figure 8: Seating capacity use at CDSBEO



While high rates of capacity use are generally an excellent indicator, the concern is whether such a significant number of high capacity routes are sustainable in the long term. Additionally, the question of why such a significant number of runs can be overloaded is not addressed through the capacity analysis. While this is a reasonable strategy for many high school routes due to the number of students who drive or find alternative means of service, its use is less clear at other grade levels.

Ride time data indicates that the services provided by both Boards are well within established policy guidelines. 94 percent of all morning riders and 98 percent of all afternoon riders have ride times less than the guideline of one hour. Additionally, 75 percent of riders in the morning and 81 percent of afternoon riders have ride times of 40 minutes or less. This would indicate that despite the large service area a majority of students are receiving effective service delivery. The charts below summarize morning and afternoon ride times in 10 minute increments for all students in both Boards.

Figure 9: Morning and afternoon ride times



While each of the operations exhibits elements of efficiency, it is not possible within the scope of this analysis to determine the comparative level of efficiency were the operations to be combined. However, it should be noted that historical practices have recognized that combined operations can result in efficiencies. Although it is a limited example, the combined operations in the Lanark area are illustrative of the value of the consortium concept. As STEO develops into a unified service provider additional opportunities for both shared routes and shared trips will be identified.

5.5.2 Recommendations

Establish a unified planning operation for STEO

The goal of the consortium process across the Province has been to increase the effectiveness and efficiency of student transportation services by reducing organizational and operational redundancies. The development of a single planning operation within STEO is necessary for the benefits to be realized. In addition to the establishment of a common technology platform, it will be necessary to conduct a comprehensive analysis of the opportunities presented by combining the two route networks.

While the specific tasks and timelines associated with a detailed routing analysis should be established by STEO management in conjunction with the Governance and Administrative committees, it is clear that a significant initial task will be an assessment of bell times and routing combinations. The analysis should be conducted which is consistent with the expectations of STEO policy and procedures that have previously been recommended for development (see Section 4.2.3 of this report). This analysis will provide insight into various routing options including the integration of routes between

Boards, increased integration of trips between Boards, and the availability of alternative options such as transfers and shuttles that would result in the need to dedicate fewer resources to transportation. A consolidated planning organization is the only mechanism that will allow for these opportunities to be identified and analyzed in a systematic manner consistent with a single set of service expectations and procedures.

5.6 Results of E&E Review

Routing and technology has been rated as **Low**. The rating is primarily reflective of the fact that the organization and operation of independent entities is counter to the expectations of the E&E process. Each operation has demonstrated an ability to manage transportation services in a manner that realizes efficiencies within the confines of the individual department's constraints. However, the lack of a unified operation has resulted in duplication of costs, systems purchases, training requirements, and equipment.

While there are a number of complex and likely contentious decisions that must be made for the unification of the two operations to occur, the elimination of existing redundancies will result in cost reductions over time. In addition, changing the perspective of planning staff to include the combination of UCDSB and CDSBEO service requirements will result in the identification of opportunities to improve service effectiveness and efficiency. The demonstrated competencies and professionalism of staff, the commonality of many systems and experience with sharing services across the service area should allow STEO to quickly transition to a functional, unified operation.

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;
- Goods and services procurement; 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: 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 does not have harmonized bus operator contracts, as each Member Board has individually signed contracts with its respective bus operators. Within each Member Board, the contracts are standardized and all contracts are signed before service begins.

The CDSBEO's operator contracts are valid from December 1, 2010 to June 30, 2011 and are based on the Ministry's template. The contract valid from September 7, 2010 to November 30, 2010 was replaced to ensure that the CDSBEO adhered to the provincial contract templates. There is a renewal provision at the Board's option.

The UCDSB's operator contracts are valid from September 7, 2010 to September 7, 2011, and cover the summer school period. The contract can be automatically renewed for one year.

While the Member Boards' operator contracts are not standardized, they both outline appropriate legal, safety and other non-monetary terms, including:

- The nature of the transportation services to be provided, including the Board's right to specify the number of vehicles that will need to be used and other aspects of service. While the Board will not specify the size of the vehicle required, they will only pay for the vehicle required to transport the students on that specific route (e.g., a route with 48 students will be paid as if service were provided by a 54-passenger bus);
- The term of the contract and the conditions under which the School Board can terminate and/or alter the contract;
- Fee structures, payment schedules, and other invoicing / payment provisions such as fuel escalation;
- The requirement to abide by the Standards of Performance, and the Board's right to verify compliance;
 - The Standards of Performance address operator responsibilities, driver responsibilities, specialized transportation responsibilities, school responsibilities, and Board responsibilities. Some of the operator and driver responsibilities addressed include: information requirements, incident reporting procedures, vehicle standards, driver training and safety

requirements, confidentiality policies, insurance requirements, camera use policies, and rules and regulations for specialized transportation.

- All drivers are required to be trained in school bus safety programs, which address First Aid, CPR and EpiPen training. However, there is no time limit specified and drivers are not required to be trained prior to beginning a bus route.
- The use of personal information, compliance with applicable legislation, and non-disclosure agreements to protect confidential information;
- The Board's right to determine route design, pickup locations, and drop-off locations;
- Vehicle and fleet requirements, including maximum vehicle age and average fleet age (e.g., CDSBEO has a maximum vehicle age of 11 years, and the UCDSB has a maximum vehicle age of 12 years).
- Driver requirements (e.g., licensing and insurance requirements, vulnerable sector checks, etc);
- Driving requirements (e.g., compliance with the Highway Traffic Act, idling practices, dry runs, etc);
- Subcontracting rights, including the requirement that the operator seek the Board's written consent prior to assigning the contract and that every subcontract entered into by the operator must meet or exceed the terms and conditions of the operator's contract;
- Other provisions, including: operator representation and warranties; indemnification and insurance requirements; safety programs; incident reporting; and dispute resolution, amongst others.

As discussed above, the operator contracts require operators to adhere to the Standards of Performance, which is a jointly-developed document that outlines the responsibilities of the various parties involved in the transportation of students. The operator's adherence to the Standards of Performance also impacts the operator's annual rating (see Section 6.4.1.3).

While the operator contracts do not explicitly address a Member Board's ability to reallocate existing routes or to allocate new routes, the Member Board is able to use provisions addressing the Standards of Performance to reallocate existing routes or to allocate new routes in line with operator performance.

Bus operator compensation

Bus operator compensation is based upon:

- A fixed cost that is expected to cover depreciation expenses, interest costs, driver expenses, and other fixed costs. The fixed cost is also adjusted for vehicles contracted for double runs, and there are different fixed costs associated with different vehicle sizes;
- A variable cost per kilometer that is expected to cover fuel and maintenance expenses, and there are different variable costs associated with different vehicle sizes. There is a minimum payment for 50 kilometres, and an adjustment for kilometres in excess of 130 kilometres (CDSEBO) / 135 kilometres (UCDSB);
- An adjustment for escalation or de-escalation of the fuel rate, based on a survey of sixteen gas stations (two gas stations in each of the eight counties of Eastern Ontario);
- Compensation for safety training (e.g., First Aid), first time rider programs, and other programs; and
- Specific to the CDSBEO, for cancellations arising from inclement weather, the operators receive only fixed costs and the CDSBEO will pay the fixed costs for up to 30 days, after which the payments may be reduced.
- The CDSBEO also provides bus operators transporting wheelchair students with additional compensation to help operators offset some of the capital outlays required to equip school buses with appropriate equipment for wheelchair students.

Taxi operator contract clauses

For taxi operators providing regular service to UCDSB, the operator is treated as a bus operator and the taxi operator contract is the same as the bus operator contract. For taxi operators providing regular service to CDSBEO, signed contracts exist but the contract is not the same as the one used for bus operators.

For taxi operators contracted on an ad-hoc basis for a temporary situation, the Member Board generally attempts to sign a memorandum of agreement that outlines the taxi company's requirement to abide by applicable legislation (e.g., The Highway Traffic Act, Provincial Safety Standard Inspection requirements) and to maintain records on required criminal reference checks. The agreement also outlines the requirements to abide by relevant legislation such as MFIPPA and to have sufficient insurance

coverage. Not all agreements are signed before the provision of student transportation services.

Parent drivers

While the CDSBEO does not use parent drivers, the UCDSB does use parent drivers and has a policy outlining the circumstances under which parent drivers can be used. The parent drivers are required to comply with many of the items that the regular bus operators are required to comply with, such as having appropriate licensing and insurance, and complying with the Standards of Performance. The contract also specifies the term of the agreement, the rates payable, and the payment schedule.

Public transit operator contract clauses

Both Member Boards' transportation departments provide eligible students with public transit tickets where it is required by School Board policy (e.g., for secondary school students on a co-op placement). There is no formal contract between either of the transportation departments and the public transit operator, as no separate routes have been created to facilitate student transportation.

6.2.2 Best Practices

It is recognized that the transportation operations have demonstrated best practice in the following areas:

6.2.3 Standards of Performance

The Member Boards worked together to develop Standards of Performance, a document that specifically delineates the responsibilities of the various parties involved in the transportation of students. All operator, taxi and parent driver contracts require that transportation providers adhere to the Standards of Performance, and the contracts provide the Member Boards with the right to verify compliance and to penalize non-compliance. Standards that are clearly defined and enforceable help facilitate the effective and efficient provision of student transportation services in a manner that is fair, equitable and transparent. The Consortium should ensure that it adopts and regularly reviews these Standards of Performance.

6.2.4 Recommendations

Standardized contracts

It is recognized that within each Member Board, the operator and taxi contracts are standardized and executed. However, it is recommended that the Consortium work to

standardize and execute contracts on a Consortium-wide basis (i.e., operators should not have different contracts depending on which Member Board is served). As a component within the standardized contract, differences in maximum and average vehicle ages should be reconciled. This will ensure that operators have consistent expectations for vehicles used within the same service area.

Mandate that EpiPen training be provided prior to the start of the school year

It is recognized that all drivers are to be trained in school bus safety programs, which incorporate First Aid, CPR and EpiPen training. However, there is no time limit specified and drivers are not required to be trained prior to beginning a bus route. All drivers must be qualified to manage emergency situations before they start transporting students.

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 procurement

Operators are not procured through a competitive procurement process, but through negotiations with the Eastern Ontario Bus Operators (a bus operator association). The transportation departments procure for operators separately, and generally follow a similar process outlined below:

- The transportation department communicates with other School Boards' transportation operations (including the other Member Board's transportation operations) to assess current and expected costs;
- The transportation department begins negotiations with the operator association in March or April;
 - The CDSBEO's negotiation team includes two trustees, the Superintendent of Business, and the transportation manager; and
 - The UCDSB's negotiation team includes the UCDSB Board's Chair, the Superintendent of Business, the transportation manager, and the financial coordinator.

- Negotiations generally are complete by June, and the signed contracts are in place by the end of August. Within each Member Board, the operator contracts are standardized amongst all operators.

Special needs transportation

Special needs transportation is procured as part of the regular operator procurement (see section above).

6.3.2 Recommendations

Develop plans for the implementation of competitive procurement

Contracts for school bus transportation services are currently not competitively awarded. This is not in keeping with either best practices or the Ministry of Finance Supply Chain Guideline and the Broader Public Sector Procurement Directive. By not engaging in a competitive process, it is not known whether services are being provided at the best rates. 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. This 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 could enforce limits placed on the amount of business any one operator can hold to avoid a monopoly situation, and to encourage small operators' participation. 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 rural operators. Established procurement policies should determine the process for service acquisition in these situations.

As a reference, the Consortium should start developing an implementation plan for competitive procurement using the *Contracting Practices Resource Package* and other resources provided by the Ministry. 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, a criteria and timeline to phase-in competitive procurement, and development of a procurement calendar. The plan should also utilize the best practices and lessons learned that are available from the pilot consortia.

The Consortium must work to develop and implement a competitive procurement policy that is aligned with the Ministry of Finance Supply Chain Guideline and the Broader Public Sector Procurement Directive.

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 contracted levels of service. 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, facility and maintenance monitoring

The transportation departments use comprehensive facility audit evaluations that assess operators' compliance with contract requirements. The basis for the facility audits is a clause in the operator contracts that outlines the Board's right to audit operator compliance, and the requirement that operators comply with the Standards of Performance. While the Standards of Performance are common for both transportation departments, each department conducts its evaluations independently.

The facility audits are conducted on site, but have a pre-inspection component that is conducted at the transportation department. Operators are provided with notice before the facility audit is conducted.

The facility audit evaluates: administrative and maintenance performance, operational management, communication and incident reporting practices, driver training, document control, and safety performance. These audits are conducted annually by transportation department staff or by experienced third parties, and the results are discussed with the individual operators. The operators are also provided with the overall results and areas of concern, along with suggestions for improvement. Failure to address the areas of concern can result in loss of routes and even contract termination, depending on the issue. The operators must pass all categories, and if an operator fails a facility audit, the transportation department and the operator work out an action plan and a timeline to resolve the issue effectively.

The transportation departments track the results of the facility audits and prepare trend analyses, to evaluate operator performance over time. Strong performance can result in the allocation of new routes.

The transportation departments also track insurance coverage, vehicle age, and driver training and driver-related information (e.g., safety training and expiry, confidentiality forms, criminal checks, etc) by asking operators to submit this information on a regular basis, via TRACS or e-mail.

Operator safety and service monitoring

The transportation departments evaluate operator safety through its annual facility audits, which dedicate an entire section to operator safety and another section to driver training.

Route audits and spot checks are conducted on a regular basis, and each transportation department aims to audit 10% of its routes – however, neither transportation department has been able to meet this target.

Route audits and spot checks are conducted randomly or in response to unexpected results (e.g., actual km exceeds expected km), and operators are provided with advance notice only for route audits.

The route audits and spot checks evaluate: safety of stops, distance between stops, capacity loading, condition of roads and turnarounds, route efficiency, and length and time of the route, amongst others. The route audits are generally more comprehensive than the spot checks.

Performance monitoring

As discussed in the sections above, the transportation departments monitor operator performance to evaluate whether operators are providing the necessary levels of service, such as, for example, ensuring that drivers have adequate First Aid and CPR training.

The UCDSB also uses its GPS monitoring system to monitor operator performance and to investigate and follow up on any complaints received with regards to operator performance (e.g., missed stops, speeding, bus route not being followed, delays in service, etc). Both transportation departments have a process for incident reporting, which involves documenting the issue, investigating the issue, following up with the operator, and documenting how the issue was resolved.

6.4.2 Best Practices

Operator administrative, contract, facility and maintenance compliance

The transportation departments ensure that operators are in compliance with contractual requirements, including the Standards of Performance, with regular facility audits and compliance checks. In addition, the transportation departments track operator performance over time and have the ability to reward strong performance with the allocation of new routes and to penalize inadequate performance through route reallocations or contract termination. Such efforts to ensure operator compliance help the transportation departments measure whether the operators are complying with stated contract clauses and the Standards of Performance and, ultimately, if they are providing safe and reliable service. However, it is recommended that the Consortium work to eliminate the duplication of efforts, as currently, each transportation department conducts its evaluations independently.

Route audits

The transportation departments perform periodic audits of operators to ensure that on-road service quality matches the expectations set out in the operator contract. Audits are a key component of contract management. They measure whether the operators and drivers are complying with stated contract clauses and ultimately if they are providing safe, reliable and efficient service. However, it is recommended that the Consortium work to meet its stated route audit targets.

6.4.3 Recommendations

Standardize Contract Management policies and practices

Each transportation department is independently strong in its contract management practices, but to reduce the duplication of efforts and to increase effectiveness and efficiency, it is recommended that the Consortium work to integrate these contract management policies and practices on a Consortium wide basis.

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 **Low**

Positive elements exhibited by each of the transportation departments include the execution of comprehensive operator contracts and an effective and efficient program to monitor operator compliance and performance. These strengths can be leveraged to establish best practices when Consortium-wide contracts are executed. The joint development of the harmonized Standards of Performance that clearly define expectations and responsibilities for transportation providers is an excellent start to integrating contracting and contract management practices.

The continued independence of the two departments' contract management practices is inconsistent with the objectives of the E&E process and creates a number of functional and administrative redundancies. It is recommended that the Consortium work to integrate the two departments' contract management practices into a single, streamlined contract management process that draws upon the individual transportation departments' strengths.

The Consortium must develop plans for the implementation of competitive procurement to ensure that the Consortium is able to obtain best value for the money expended and to ensure compliance with the Ministry of Finance Supply Chain Guideline and the Broader Public Sector Procurement Directive. Another significant consideration is that the Consortium should work towards ensuring that all drivers have appropriate safety training prior to beginning their routes.

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 4. 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 6: Funding Adjustment Formula

| Overall Rating | Effect on deficit Board ¹⁰ | Effect on surplus Board |
|----------------|---|--|
| 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 0% | 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

Catholic District School Board of Eastern Ontario

| Item | Value |
|---|--------------|
| 2009-2010 Transportation Surplus (Deficit) | \$628,230 |
| % of Surplus (Deficit) attributed to the Consortium | 100% |
| Revised amount to be assessed under the Consortium | \$628,230 |
| E&E Rating | Low |
| Funding Adjustment based on Ministry's Funding Adjustment Formula | 0% |
| 2010-2011 Total Funding adjustment | Nil |

Upper Canada District School Board

| Item | Value |
|---|--------------|
| 2009-2010 Transportation Surplus (Deficit) | (\$35,921) |
| % of Surplus (Deficit) attributed to the Consortium | 100% |
| Revised amount to be assessed under the Consortium | (\$35,921) |
| E&E Rating | Low |
| Funding Adjustment based on Ministry's Funding Adjustment Formula | 0% |
| 2010-2011 Total Funding adjustment | Nil |

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

8 Appendix 1: Glossary of Terms

| Terms | Definitions |
|-----------------------------|---|
| 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 |
| CDSBEO | Catholic District School Board of Eastern Ontario |
| 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 STEO | Student Transportation of Eastern Ontario |
| 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 Student Transportation of Eastern Ontario” 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 |

| Terms | Definitions |
|--|---|
| 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 |
| Member Boards, School Boards or Boards | The school boards that have participated as full partners or members in the Consortium; the CDSBEO and the UCDSB |
| 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 |
| Type A school bus | A smaller asset, typically with a 20 passenger capacity, oftentimes used to transport special needs students |
| UCDSB | Upper Canada District School Board |

9 Appendix 2: Financial Review – by School Board

Catholic District School Board of Eastern Ontario

| Item | 2006-2007 | 2007-2008 | 2008-2009 | 2009-2010 ⁹ | 2010-2011 ¹⁰ |
|-------------------------------------|------------|------------|------------|------------------------|-------------------------|
| Allocation ¹¹ | 12,990,270 | 13,238,864 | 13,662,361 | 13,511,113 | 13,175,039 |
| Expenditure ¹² | 12,307,968 | 12,298,565 | 12,734,509 | 12,882,883 | 13,087,430 |
| Transportation Surplus (Deficit) | 682,302 | 940,299 | 927,852 | 628,230 | 87,609 |

Upper Canada District School Board

| Item | 2006-2007 | 2007-2008 | 2008-2009 | 2009-2010 ¹¹ | 2010-2011 ¹² |
|-------------------------------------|------------|------------|------------|-------------------------|-------------------------|
| Allocation ¹³ | 22,772,328 | 23,217,140 | 23,981,494 | 24,191,269 | 23,911,775 |
| Expenditure ¹⁴ | 23,287,573 | 23,153,226 | 23,829,480 | 24,227,190 | 24,712,230 |
| Transportation Surplus (Deficit) | (515,245) | 63,914 | 152,014 | (35,921) | (800,455) |

¹¹ 2009-2010 allocations and expenditures based on Ministry data – Financials for 2009-2010

¹² 2010-2011 allocations and expenditures based on Ministry data – Revised Estimates for 2010-2011

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

¹⁴ Expenditure based on Ministry data - taken from Data Form D:730C (Adjusted expenditures for compliance) - 212C (Other Revenues) + Schedule 10:620C (Transportation Amortization)

10 Appendix 3: Document List

1. AA10 - November 2, 2010 Meeting Minutes_UCDSB.pdf
2. AA10 - Zycom Technical Proposal Trapeze Managed Services_STEO.pdf
3. AA11 - Policy300Communications_UCDSB.pdf
4. AA11 - Procedure3001Communications_UCDSB.pdf
5. AA12 - Bus Driver Appreciation Letter_UCDSB.pdf
6. AA12 - Driver of the Year Award Nomination form_UCDSB.pdf
7. AA12 - Email to Contractors_UCDSB.pdf
8. AA12 - Email to Schools_UCDSB.pdf
9. AA12 - Memo to schools re Driver appreciation day_UCDSB.pdf
10. AA12 - Memo to schools re Driver of the Year Award_UCDSB.pdf
11. AA13 - August Contractor Meeting Discussion Items_UCDSB.pdf
12. AA13 - August Contractor Meeting read me_UCDSB.pdf
13. AA13 - Email invitation to contractors_UCDSB.pdf
14. AA13 - enrollment - B2020 presentation_UCDSB.pdf
15. AA13 - Invitation to August Contractor Meeting_UCDSB.pdf
16. AA13 - School Bus Safety For All presentation_UCDSB.pdf
17. AA14 - Sept Startup Nucomm Calls Answered_UCDSB.pdf
18. AA14 - Sept Startup Nucomm Calls Answered_UCDSB.pdf
19. AA14 - Sept Startup Transportation Phone Calls_UCDSB.pdf
20. AA14 - Sept Startup Transportation Phone Calls_UCDSB.pdf
21. AA15 STEO Governance Committee Minutes.pdf
22. AA16 CDSBEO OSBIE 2011.pdf

23. AA17 CDSBEO Budget Planning and Monitoring e-mails.pdf
24. AA18 CDSBEO Parent Drivers.pdf
25. AA19 CDSBEO Flrst Time Riders Pamphlet.pdf
26. AA20 CDSBEO My Yellow School Bus Pamphlet.pdf
27. AA21 CDSBEO Purple Band Program.pdf
28. AA22 CDSBEO School Busing Fact Sheet.pdf
29. AA23 CDSBEO Guideline Booklet.pdf
30. AA24 CDSBEO Emergency Busing Process.pdf
31. AA25 CDSBEO Emergency Busing Form.pdf
32. AA26 CDSBEO Inclement Weather Letter to Parents.pdf
33. AA27 CDSBEO Video Camera Use.pdf
34. AA28 CDSBEO Letter from Healey Bus Lines.pdf
35. AA29CDSBEO Letter to Healy Bus Lines.pdf
36. AA3 - 2006-2007 Annual Report_UCDSB.pdf
37. AA3 - 2007-2008 Annual Report_UCDSB.pdf
38. AA3 - 2008-2009 Annual Report_UCDSB.pdf
39. AA3 - 2009-2010 Annual Report_UCDSB.pdf
40. AA6 - Contest Introduction - TSP Web site_UCDSB.pdf
41. AA6 - Transportation Contest Questions_UCDSB.pdf
42. AA6 - TSP Guideline Booklet pg 16_UCDSB.pdf
43. AA6 - TSP Guideline booklet see pg 16_UCDSB.pdf
44. AA7 - Road Closures-Construction_UCDSB.pdf
45. AA8 - TSP215-Sept Startup procedure_UCDSB.pdf

46. AA9 - WSIB and CVOR samples_UCDSB.pdf
47. C 1a cdsbeo.doc
48. C 1a1 cdsbeo.doc
49. C 1a2 cdsbeo.pdf
50. C 1b cdsbeo.pdf
51. C 1b1 cdsbeo.pdf
52. C 1c - A and R Enterprise Rate Schedule_UCDSB.pdf
53. C 1c - Description of Contractor Compensation_UCDSB.pdf
54. C 1c cdsbeo.xls
55. C 1c1 cdsbeo.doc
56. C 2 cdsbeo.pdf
57. C 3a cdsbeo.xlsx
58. C 3c cdsbeo.pdf
59. C 4 - Contractor and Driver Training_STEO.pdf
60. C 4 cdsbeo.xlsx
61. C 5 - Inventory of School Bus Fleet_UCDSB.pdf
62. C 6a cdsbeo.pdf
63. C 6a1 cdsbeo.docx
64. C 7a cdsbeo.pdf
65. C 7a Read Me Document_UCDSB.pdf
66. C 7a1 cdsbeo.pdf
67. C 7b Bus Contractor Insurance Chart_UCDSB.pdf
68. C 7b cdsbeo.pdf

69. C 7b Proof that the Consortium Collects Information_UCDSB.pdf
70. C 7b Sample of STATS_UCDSB.pdf
71. C 7b Statistics Report_UCDSB.pdf
72. C 7b1 cdsbeo.pdf
73. C 7b2 cdsbeo.xls
74. C 7c - Performance Monitoring - Invoice Submission_UCDSB.pdf
75. C 7c - Performance Monitoring - Misc Items_UCDSB.pdf
76. C 7c - Performance Monitoring - Misconduct Books_UCDSB.pdf
77. C 7c - Performance Monitoring - Student Tsp Agreement_UCDSB.pdf
78. C 7c cdsbeo.xlsx
79. C 9A - Student TSP Services Agreement_UCDSB.pdf
80. C 9a cdsbeo.pdf
81. C 9b cdsbeo.docx
82. C 9b1 cdsbeo.xls
83. C 9b2 cdsbeo.doc
84. C 9b3 cdsbeo.doc
85. C 9b4 cdsbeo.doc
86. C 9b5 cdsbeo.doc
87. C 9c cdsbeo.xls
88. C 9c1 cdsbeo.pdf
89. C 9d & C 9e cdsbeo.pdf
90. C 9d1 & C 9e1 cdsbeo.pdf
91. C 9d2 & C 9e2 cdsbeo.pdf

92. C 9d3 & C9e3 cdsbeo.pdf
93. C 9d4 & C9e4 cdsbeo.pdf
94. C 9d5 & C9e5 cdsbeo.pdf
95. C 9f cdsbeo.xls
96. C 9g cdsbeo.pdf
97. C10 - Board Owned Vehicles_UCDSB.pdf
98. C1a - covering letter from rick gales_UCDSB.pdf
99. C1a - Schedule A - Compensation Rates.pdf
100. C1a - Schedule B Standards of Performance 2010-11_UCDSB.pdf
101. C1a - Schedule C Transportation Rate Schedule 2010-11_UCDSB.pdf
102. C1a - Schedule D Letter TSP Rate Schedule_UCDSB.pdf
103. C1a - Student TSP Services Agreement_UCDSB.pdf
104. C1b_UCDSB.pdf
105. C2 - Procedures and Policies Spec Tsp_UCDSB.pdf
106. C3a - List of Paid Parent Drivers_UCDSB.pdf
107. C3a - UCDSB Contractor List_UCDSB.pdf
108. C3b_UCDSB.pdf
109. C3c - Amy Clements_UCDSB.pdf
110. C3c - Judy Hall_UCDSB.pdf
111. C3c - Maureen Young_UCDSB.pdf
112. C3c - Signature Sheets for all Bus Operators_UCDSB.pdf
113. C3c - Taxi Company Agreement_UCDSB.pdf
114. C5 cdsbeo.xlsx

115. C6a - TSP133-TRANSFERS AND PUBLIC TRANSPORTATION_UCDSB.pdf
116. C6a - TSP133-TRANSFERS AND PUBLIC TRANSPORTATION_UCDSB.pdf
117. C7a - 2010-2011 Contractor Invoicing Calendar_UCDSB.pdf
118. C7a - Bus Contractor Insurance Chart_UCDSB.pdf
119. C7a - Bus Contractor Tracking Items to be Returned_UCDSB.pdf
120. C7a - CPR-First Aid Certification Report_UCDSB.pdf
121. C7a - Ratings June 2010_UCDSB.pdf
122. C7a - Student TSP Services Agreement_UCDSB.pdf
123. C7b - Facility Audit - Barr Bus Lines_UCDSB.pdf
124. C7b - Facility Audit - Brockville Transit-Synfast_UCDSB.pdf
125. C7b - Facility Audit - Reliable Cab_UCDSB.pdf
126. C7b - Facility Audit - Whitteker_UCDSB.pdf
127. C7b - Route Audit 1722W1828W_UCDSB.pdf
128. C7b - Route Audit 4005_UCDSB.pdf
129. C7b - Route Audit 4140pm_UCDSB.pdf
130. C7b - Spot Check 1734_UCDSB.pdf
131. C7b - Spot Check 1737-1869_UCDSB.pdf
132. C8 - Transportation RFP_STEO.pdf
133. C9a - TSPS0301 Standards of Performance 2010-11_UCDSB.pdf
134. C9b - TSP116 - Facility-Route Audit-Spot Check-Student Count Audit Procedure.pdf
135. C9b - TSP116A-Spot Check form.pdf
136. C9b - TSP116B-Route Audit form.pdf
137. C9b - TSP116C-Facility Audit Review.pdf

138. C9b - TSP116D-Student Count Form.pdf
139. C9b - TSP116E - Facility Info Working Document.pdf
140. C9b - TSP116F - Driver Info Working Document.pdf
141. C9d - route audit 1722W1828W_UCDSB.pdf
142. C9d - route audit 4005_UCDSB.pdf
143. C9d - route audit 4140pm_UCDSB.pdf
144. C9d - spot check 1734_UCDSB.pdf
145. C9d - spot check 1737-1869_UCDSB.pdf
146. C9e - route audit 4005_UCDSB.pdf
147. C9e - route audit 4140pm_UCDSB.pdf
148. C9e - spot check 1734_UCDSB.pdf
149. C9e - spot check 1737-1869_UCDSB.pdf
150. C9f - Ratings Spreadsheet June 2010_UCDSB.pdf
151. C9g - rating template letter_UCDSB.pdf
152. CM 10 1cdsbeo.docx
153. CM 10 Progress tracked by management_UCDSB.pdf
154. CM 10a Strategic Report_STEO.pdf
155. CM 10a Strategic Report_STEO.pdf
156. CM 113D_UCDSB.pdf
157. CM 113E_UCDSB.pdf
158. CM 11b - KPI_UCDSB.pdf
159. CM 11b 1cdsbeo.xlsx
160. CM 11b cdsbeo.pdf

161. CM 11C Performance Metrics and Consortium Performance Analysis_UCDSB.pdf
162. CM 11d Performance Metrics and Consortium Performance Analysis_UCDSB.pdf
163. CM 12a - Board Policies re info collection_UCDSB.pdf
164. CM 12a - email regarding Retention Schedule_UCDSB.pdf
165. CM 12a - Policy 307 Freedom of Information_UCDSB.pdf
166. CM 12a - Policy 308 Records Management_UCDSB.pdf
167. CM 12a - Procedure 308-1 Records Management_UCDSB.pdf
168. CM 12a cdsbeo.xls
169. CM 12a_Data Protection Agreement_ GPS Hosting_UCDSB.pdf
170. CM 12a_Data Protection Agreement_Interlock_TRACS_UCDSB.pdf
171. CM 12a_Data Protection Agreement_Trapeze_Mapnet_UCDSB.pdf
172. CM 12b - Signed Consortium Agreement_STEO.pdf
173. CM 12b - Signed Consortium Agreement_STEO.pdf
174. CM 12c - Freedom of Information_UCDSB.pdf
175. CM 12d cdsbeo.xls
176. CM 12d1 cdsbeo.pdf
177. CM 12e cdsbeo.pdf
178. CM 12f read me_UCDSB.pdf
179. CM 12f.pdf
180. CM 13a and CM 13b Request Form-Supplemental Budget_UCDSB.pdf
181. CM 13a and CM13b Budget Forms_UCDSB.pdf
182. CM 13a and CM13b email from Manager of Budgeting and Forecasting_UCDSB.pdf

- 183. CM 13a and CM13b_UCDSB.pdf
- 184. CM 13a cdsbeo.xls
- 185. CM 13a1 & CM 13c & CM 13e cdsbeo.pdf
- 186. CM 13a2 cdsbeo.pdf
- 187. CM 13a3 cdsbeo.pdf
- 188. CM 13a4 cdsbeo.pdf
- 189. CM 13b cdsbeo.xls
- 190. CM 13C 2010-11 Fuel Escalator_De-escalator Sandbox_UCDSB.pdf
- 191. CM 13c CONSOLIDATED YTD Forecast and Variance Analysis Nov 30 2010_UCDSB.pdf
- 192. CM 13d cdsbeo.pdf
- 193. CM 14 - Catholic invoice Feb 1 to Jun 30 2010_UCDSB.pdf
- 194. CM 14 - CDSBEO billing Feb-June 2010_UCDSB.pdf
- 195. CM 14 - Enrollment Forecasts_UCDSB.pdf
- 196. CM 14a - TSP507-Financial Integrity_UCDSB.pdf
- 197. CM 14a - TSP507-Financial Integrity_UCDSB.pdf
- 198. CM 14a & CM 14c cdsbeo.pdf
- 199. CM 14b cdsbeo.pdf
- 200. CM 14C - AC002-PO Voucher_UCDSB.pdf
- 201. CM 14C - AC008-Writing Journal Entries_UCDSB.pdf
- 202. CM 14C - AC011-Invoicing_UCDSB.pdf
- 203. CM 14C - AC020-Regular Travel and Expense Claim_UCDSB.pdf
- 204. CM 14C - AC023-Accounts Receivable Reconciliation_UCDSB.pdf
- 205. CM 14C - AC027-Cheque Run Other_UCDSB.pdf

- 206. CM 14C - AC028-Cheque Run - Transportation_UCDSB.pdf
- 207. CM 14C - AC056-Determining a legitimate invoice_UCDSB.pdf
- 208. CM 14C - Policy 450 Corporate Credit Cards_UCDSB.pdf
- 209. CM 14C - Procedure 429.1 Signing Authority Appendix A and B_UCDSB.pdf
- 210. CM 14C - Procedure 429.1 SigningAuthority_UCDSB.pdf
- 211. CM 14C - Procedure 429.2 Purchasing Appendix A_UCDSB.pdf
- 212. CM 14C - Procedure 429.2 Purchasing Code of Ethics_UCDSB.pdf
- 213. CM 14C - Procedure 429.2 Purchasing_UCDSB.pdf
- 214. CM 14C - Procedure 450.1 Corporate Credit Cards_UCDSB.pdf
- 215. CM 14C - TSP503- Procedure to generate invoicing summary in Tracs_UCDSB.pdf
- 216. CM 14C - TSP505- CALCULATING CONTRACTORS RATES_UCDSB.pdf
- 217. CM 14C - TSP506- Procedure to verify rates are updated in TRACS_UCDSB.pdf
- 218. CM 14C - TSP510- Accounting Procedure_UCDSB.pdf
- 219. CM 14C - TSP512 - AUDITING CONTRACTOR MONTHLY INVOICES_UCDSB.pdf
- 220. CM 14C - UCDSB Purchasing Policy_UCDSB.pdf
- 221. CM 14C- TSP511-Updating the Monthly Fuel Rate_UCDSB.pdf
- 222. CM 14d - Strategies to Address Declining Enrolment_UCDSB.pdf
- 223. CM 14d - TSP508- Forecast of Fuel Escalation-De-escalation_UCDSB.pdf
- 224. CM 14d - TSP509-MONTHLY FINANCIAL FORECAST_UCDSB.pdf
- 225. CM 14d cdsbeo.xls
- 226. CM 14e - sample invoice to catholic board_UCDSB.pdf

- 227. CM 14e - TSP513- Procedure to invoice service purchasing boards_UCDSB.pdf
- 228. CM 14e cdsbeo.pdf
- 229. CM 14f - Invoicing October_UCDSB.pdf
- 230. CM 14f - Invoicing October_UCDSB.pdf
- 231. CM 14f - Verification CMartin Invoice Calculation 2010-2011_UCDSB.pdf
- 232. CM 14f - Verification CMartin Invoice Calculation 2010-2011_UCDSB.pdf
- 233. CM 14f 1cdsbeo.xls
- 234. CM 14f cdsbeo.pdf
- 235. CM 1b_STEO.pdf
- 236. CM 1b_STEO.pdf
- 237. CM 2a Governance_Administrative_Committee Org Charts_STEO.pdf
- 238. CM 2c_STEO.pdf
- 239. CM 3a - Consortium Org Chart_STEO.pdf
- 240. CM 3a cdsbeo.doc
- 241. CM 3a cdsbeo.doc
- 242. CM 3b - Financial Coordinator_UCDSB.pdf
- 243. CM 3b - GIS Administrator_UCDSB.pdf
- 244. CM 3b - Mgr of Transportation_UCDSB.pdf
- 245. CM 3b - Office Administrator Transportation_UCDSB.pdf
- 246. CM 3b - Transportation Clerk_UCDSB.pdf
- 247. CM 3b - Transportation Route Planner_UCDSB.pdf
- 248. CM 3b cdsbeo.pdf
- 249. CM 4 - Cree School Board Agreement_UCDSB.pdf

- 250. CM 4 - Signed Agreement with CTSO_UCDSB.pdf
- 251. CM 4 - Signed Consortium Agreement_STEO.pdf
- 252. CM 5 - Agreement with Trapeze_UCDSB.pdf
- 253. CM 5 - Grant of Permission for Use of Data Products - TRACS_UCDSB.pdf
- 254. CM 5 - School Seeker Agreement_UCDSB.pdf
- 255. CM 5 - Service Level Agreements read me_UCDSB.pdf
- 256. CM 5 - Signed Agreement with Cree Board_UCDSB (1).pdf
- 257. CM 5 - Signed Agreement with CTSO_UCDSB.pdf
- 258. CM 5 - TRACS Service License and Support Agreement_UCDSB.pdf
- 259. CM 5 - Zycom Technical Proposal Trapeze Managed Services_STEO.pdf
- 260. CM 5 1 cdsbeo.pdf
- 261. CM 5 2 cdsbeo.pdf
- 262. CM 5 3 cdsbeo.pdf
- 263. CM 5 cdsbeo.pdf
- 264. CM 6 cdsbeo.doc
- 265. CM 6 Contracts relating to support services_UCDSB.pdf
- 266. CM 7a cdsbeo.xls
- 267. CM 7a_UCDSB.pdf
- 268. CM 7b_UCDSB.pdf
- 269. CM 8 - Procedure4291SigningAuthority1_UCDSB.pdf
- 270. CM 8 - Procedure4291SigningAuthorityAppendixAandB_UCDSB.pdf
- 271. CM 8 - Procedure4292Purchasing_UCDSB.pdf
- 272. CM 8 - Procedure4292PurchasingAppendixA_UCDSB.pdf

- 273. CM 8 - Procedure4292PurchasingCodeofEthics_UCDSB.pdf
- 274. CM 8 - PSO429PurchasingRevision2_UCDSB.pdf
- 275. CM 8 - Transportation RFP_STEO.pdf
- 276. CM 8 cdsbeo.docx
- 277. CM 9a - CUPE UCDSB 2008-2012 Collective Agreement_UCDSB.pdf
- 278. CM 9a - Managerial Non-Union Employment Conditions Jan 2005_UCDSB.pdf
- 279. CM 9a cdsbeo.doc
- 280. CM 9a1 cdsbeo.doc
- 281. CM 9a2 cdsbeo.pdf
- 282. CM 9b - Employee Appraisal_UCDSB.pdf
- 283. CM 9b - Employee Appraisal_UCDSB.pdf
- 284. CM 9b - Policy204EmployeePerformanceAppraisal_UCDSB.pdf
- 285. CM 9b - Policy204EmployeePerformanceAppraisal_UCDSB.pdf
- 286. CM 9b cdsbeo.doc
- 287. CM 9b_UCDSB.pdf
- 288. CM 9b_UCDSB.pdf
- 289. CM 9c staff training_UCDSB.pdf
- 290. CM 9c1 cdsbeo.doc
- 291. CM 9c2 cdsbeo.doc
- 292. CM 9d cdsbeo.xlsx
- 293. CM 9e - Transportation Succession Planning_UCDSB.pdf
- 294. CM 9f Contracts relating to support services_UCDSB.pdf
- 295. CM 9f evidence that goals-objectives are communicated_UCDSB.pdf

- 296. CM 9f1 cdsbeo.doc
- 297. CM 9f2 & CM 10b & CM 10 cdsbeo.pdf
- 298. CM11A_UCDSB.pdf
- 299. CM11B_UCDSB.pdf
- 300. CM12d - Operator agreements_UCDSB.pdf
- 301. CM12e - Delaney 4 drivers_UCDSB.pdf
- 302. CM12e - Howard 4 drivers_UCDSB.pdf
- 303. CM12e - Stock Iroquois 4 drivers_UCDSB.pdf
- 304. CM12f - Declaration and confidential info for STEO-UCDSB employees.pdf
- 305. CM5 - Taxi Company Agreement_UCDSB.pdf
- 306. CM7a_b_Confirmation of Insurance 2010_UCDSB.pdf
- 307. CM7a_b_Confirmation of Insurance 2011_UCDSB.pdf
- 308. Departmental Training Tracking Spreadsheet_UCDSB.pdf
- 309. Draft Bus Stop Assessment_STEO.pdf
- 310. Draft Eligibility for TSP procedure_STEO.pdf
- 311. Draft Hazards_STEO.pdf
- 312. Draft Life Threatening Emergency Medical Forms procedure_STEO.pdf
- 313. Draft Ride Time Guidelines_STEO.pdf
- 314. Draft Ride Time Guidelines_STEO.pdf
- 315. Draft Route Optimization_STEO.pdf
- 316. Draft School Bus Accident-Incident Procedure_STEO.pdf
- 317. Draft Seat Loading Guidelines_STEO.pdf
- 318. Draft Seat Loading Guidelines_STEO.pdf

- 319. Draft Walking Distances_STEO.pdf
- 320. Governance Committee - Signed Minutes_27Jan10_STEO.pdf
- 321. Governance Committee_Signed Minutes_16Apr10_STEO.pdf
- 322. NuComm - September Bussing_UCDSB.pdf
- 323. NuComm Inclement Weather_UCDSB.pdf
- 324. PP 1 - Policiy and Procedure for regular and special needs_UCDSB.pdf
- 325. PP 3 cdsbeo.pdf
- 326. PP 4 - Contractor Checklist August mtg_UCDSB.pdf
- 327. PP 4 - Performance Monitoring - invoice submission_UCDSB.pdf
- 328. PP 4 - Performance Monitoring - misc items_UCDSB.pdf
- 329. PP 4 - Performance Monitoring - misconduct books_UCDSB.pdf
- 330. PP 4 - Performance Monitoring - Student TSP Agreement_UCDSB.pdf
- 331. PP 4 1cdsbeo.pdf
- 332. PP 4 cdsbeo.xls
- 333. PP 5 1cdsbeo.doc
- 334. PP 5 2cdsbeo.pdf
- 335. PP 5 3cdsbeo.ppt
- 336. PP 5 4cdsbeo.doc
- 337. PP 5 cdsbeo.doc
- 338. PP 6 - List of Driver Training Requirements_UCDSB.pdf
- 339. PP 6 - List of Driver Training Requirements_UCDSB.pdf
- 340. PP 6 - List of Driver Training Requirements_UCDSB.pdf
- 341. PP 6 cdsbeo.pdf

- 342. PP1 - Facility Audit Review letter_UCDSB.pdf
- 343. PP1 - Service Criteria - Student TSP Services Agreement_UCDSB.pdf
- 344. PP1 - TSP Info and Guidelines for Parents and Students_UCDSB.pdf
- 345. PP1 - TSP100-ELIGIBILITY FOR TRANSPORTATION
PROCEDURE_UCDSB.pdf
- 346. PP1 - TSP102-REQUEST FOR TRANSPORTATION ADMINISTRATIVE-
ROUTING_UCDSB.pdf
- 347. PP1 - TSP107-PROCESS FOR MAINTAINING LIFE THREATENING
EMERGENCY FORM_UCDSB.pdf
- 348. PP1 - TSP108-SCHOOL BUS ACCIDENT-INCIDENT
PROCEDURE_UCDSB.pdf
- 349. PP1 - TSP116 - Facility-Route Audit-Spot Check-Student Count Audit
Procedure_UCDSB.pdf
- 350. PP1 - TSP116A-Spot Check form_UCDSB.pdf
- 351. PP1 - TSP116B-Route Audit form_UCDSB.pdf
- 352. PP1 - TSP116C-Facility Audit Review_UCDSB.pdf
- 353. PP1 - TSP116D-Student Count Form_UCDSB.pdf
- 354. PP1 - TSP116E - Facility Info Working Document_UCDSB.pdf
- 355. PP1 - TSP116F - Driver Info Working Document_UCDSB.pdf
- 356. PP1 - TSP117- HAZARDS - PRIVATE ROADS_UCDSB.pdf
- 357. PP1 - TSP118- RIDE TIME-SEAT LOADING_UCDSB.pdf
- 358. PP1 - TSP123-BUS STOP PLACEMENT_UCDSB.pdf
- 359. PP1 - TSP125-Route Optimization_UCDSB.pdf
- 360. PP1 - TSP132-Missing Student_UCDSB.pdf
- 361. PP1 - TSP133-TRANSFERS AND PUBLIC TRANSPORTATION_UCDSB.pdf

- 362. PP1 - TSP312-DAILY AUDIT FOR 07 STUDENTS IN MAPNET_UCDSB.pdf
- 363. PP1 - TSPS0300 - Inclement Weather Procedure 2010-11_STEO.pdf
- 364. PP1 - TSPS0301 - Standards of Performance 2010-11_STEO.pdf
- 365. PP1 10cdsbeo.docx
- 366. PP1 11cdsbeo.docx
- 367. PP1 12cdsbeo.pdf
- 368. PP1 13cdsbeo.pdf
- 369. PP1 14cdsbeo.pdf
- 370. PP1 15cdsbeo.pdf
- 371. PP1 16cdsbeo.pdf
- 372. PP1 17cdsbeo.docx
- 373. PP1 18cdsbeo.xls
- 374. PP1 1cdsbeo.pdf
- 375. PP1 2cdsbeo.docx
- 376. PP1 3cdsbeo.pdf
- 377. PP1 4cdsbeo.pdf
- 378. PP1 5cdsbeo.pdf
- 379. PP1 6cdsbeo.pdf
- 380. PP1 7cdsbeo.pdf
- 381. PP1 8cdsbeo.docx
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- 384. PP1 TSP110-SPECIAL NEEDS TRANSPORTATION_UCDSB.pdf

- 385. PP1-TSP134-TSP Appeal Process Procedure_UCDSB.pdf
- 386. PP2 - TSP Planning Calendar_UCDSB.pdf
- 387. PP2 - Yearly_Dept_Calendar2_UCDSB.pdf
- 388. PP2 cdsbeo.xls
- 389. PP3 - Arrival Performance at Each School_Pineview PS_12-17-2010_UCDSB.pdf
- 390. PP3 - Arrival Performance_AthensDHS_PineveiwPS_12-17-2010_UCDSB.pdf
- 391. PP3 - Auto Routing 2010 User Conference_UCDSB.pdf
- 392. PP3 - Idle Summary for Fleet 12-17-2010_UCDSB.pdf
- 393. PP3 - Idle Summary for Fleet Graph_12-17-2010_UCDSB.pdf
- 394. PP3 - Operator Performance Monitoring - GPS Reports_Overview_UCDSB.pdf
- 395. PP3 - Planned Route and Actual Route_Route 2187 12-15-2010_UCDSB.pdf
- 396. PP3 - Planned Route Only_Route 2187 12-15-2010_UCDSB.pdf
- 397. PP3 - Speeding_Report_Dec_20_Graph_UCDSB.pdf
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- 399. PP3 - Strategic Report_STEO.pdf
- 400. PP3 1cdsbeo.docx
- 401. PP4 - Arrival Performance at Each School_Pineview PS_12-17-2010_UCDSB.pdf
- 402. PP4 - Arrival Performance_AthensDHS_PineveiwPS_12-17-2010_UCDSB.pdf
- 403. PP4 - Idle Summary for Fleet 12-17-2010_UCDSB.pdf
- 404. PP4 - Idle Summary for Fleet Graph_12-17-2010_UCDSB.pdf
- 405. PP4 - Operator Performance Monitoring - GPS Reports_Overview_UCDSB.pdf

- 406. PP4 - Planned Route and Actual Route_Route 2187 12-15-2010_UCDSB.pdf
- 407. PP4 - Planned Route Only_Route 2187 12-15-2010_UCDSB.pdf
- 408. PP4 - Speeding_Report_Dec_20_Graph_UCDSB.pdf
- 409. PP4 - Speeding_Report_Dec_20_UCDSB.pdf
- 410. PP4 2cdsbeo.pdf
- 411. PP4 3cdsbeo.pdf
- 412. PP5 - Bus Evac Drill Script_UCDSB.pdf
- 413. PP5 - Buster Certificate_UCDSB.pdf
- 414. PP5 - Do Your School Bus Homework_UCDSB.pdf
- 415. PP5 - First Time Rider script_UCDSB.pdf
- 416. PP5 - FTR Certificate_UCDSB.pdf
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- 418. PP5 - My Yellow School Bus Safety Rules_UCDSB.pdf
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- 421. PP6 Standards of Performance 2010-11_UCDSB.pdf
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- 424. PP6 Student TSP Services Agreement_UCDSB.pdf
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- 427. PP8 cdsbeo.docx
- 428. Route Information - MAPNET ROUTE INFORMATION_UCDSB.xlsx

- 429. Route Information - VEO Runs with Capacity.xlsx
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- 431. RT 1 - Planning policies or practices_STEO.pdf
- 432. RT 1 - TSP118- RIDE TIME-SEAT LOADING_UCDSB.pdf
- 433. RT 1 - TSP212-TRANSFERS AND SHUTTLES_UCDSB.pdf
- 434. RT 1 - TSP220 ROUTING SOFTWARE_UCDSB.pdf
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- 436. RT 1 - TSP222- ARRIVAL AND DEPARTURE WINDOW_UCDSB.pdf
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- 446. RT 2 - TSP205- REVIEWING AND MODIFYING ROUTE
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- 488. Stop Information - MAPNET STOP LIST WITH STUDENT
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- 489. Student Information - MAPNET AM RIDE TIMES_UCDSB.xlsx
- 490. Student Information - MAPNET PM RIDER LIST WITH ROUTES AND STOP
TIMES_UCDSB.xlsx
- 491. Student Information - MAPNET STUDENT LIST WITH OSB HAZARD CODES
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- 492. Student Information - VEO Student List with Program, OSB2 and Hazard
Codes.xlsx
- 493. Student Information - VEO Students PickUp Drop Off and Travel and
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- 494. Student Informaton - MAPNET AM RIDER LIST WITH ROUTES AND STOP TIMES_UCDSB.xlsx
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- 496. TSPS0300 - Inclement Weather Procedure 2010-11_STEO.pdf
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- 499. Weather Network Agreement 2010-11_UCDSB.pdf

11 Appendix 4: Common Practices

Home to School Distance (in km)

| Activity | JK-3 | Gr. 4 - 6 | GR. 7 - 8 | GR. 9 - 12 |
|---------------------------|------|-----------|-----------|------------|
| Common Practice | 0.8 | 1.2 | 1.2 | 3.2 |
| Policy - CDSBEO | - | - | - | - |
| Stormont-Dundas-Glengarry | 1 | 1.6 | 1.6 | 2 |
| Prescott-Russell | 0.8 | 0.8 | 2 | 2 |
| Leeds-Lanark-Grenville | 1 | 1.6 | 1.6 | 2 |
| Policy - UCDSB | 0.6 | 1.6 | 1.6 | 2 |

Home to Bus Stop Distance (in km)

| Activity | JK-3 | Gr. 4 - 6 | GR. 7 - 8 | GR. 9 - 12 |
|-----------------|------|-----------|-----------|------------|
| Common Practice | 0.5 | 0.8 | 0.8 | 0.8 |
| Policy - CDSBEO | 0.6 | 0.6 | 0.6 | 0.6 |
| Policy - UCDSB | 0.6 | 0.6 | 0.6 | 0.6 |

Arrival Window (in minutes)

| Activity | JK-3 | Gr. 4 - 6 | GR. 7 - 8 | GR. 9 - 12 |
|-----------------|------|-----------|-----------|------------|
| Common Practice | 18 | 18 | 18 | 25 |
| Policy - CDSBEO | 15 | 15 | 15 | 15 |
| Policy - UCDSB | 5 | 5 | 10 – 30 | 10 – 30 |

Departure Window (in minutes)

| Activity | JK-3 | Gr. 4 - 6 | GR. 7 - 8 | GR. 9 - 12 |
|-----------------|------|-----------|-----------|------------|
| Common Practice | 16 | 16 | 18 | 18 |
| Policy - CDSBEO | 15 | 15 | 15 | 15 |
| Policy - UCDSB | 5 | 5 | 10 – 30 | 10 – 30 |

Earliest Pick Up Time

| Activity | JK-3 | Gr. 4 - 6 | GR. 7 - 8 | GR. 9 - 12 |
|-----------------|---------|-----------|-----------|------------|
| Common Practice | 6:17 AM | 6:17 AM | 6:17 AM | 6:17 AM |
| Policy - CDSBEO | 6:17 AM | 6:17 AM | 6:17 AM | 6:17 AM |
| Policy - UCDSB | 6:17 AM | 6:17 AM | 6:17 AM | 6:17 AM |

Latest Drop Off Time

| Activity | JK-3 | Gr. 4 - 6 | GR. 7 - 8 | GR. 9 - 12 |
|-----------------|---------|-----------|-----------|------------|
| Common Practice | 5:04 PM | 5:04 PM | 5:04 PM | 5:04 PM |
| Policy - CDSBEO | 5:04 PM | 5:04 PM | 5:04 PM | 5:04 PM |
| Policy - UCDSB | 5:04 PM | 5:04 PM | 5:04 PM | 5:04 PM |

Maximum Ride Time (in minutes)

| Activity | JK-3 | Gr. 4 - 6 | GR. 7 - 8 | GR. 9 - 12 |
|--------------------|------|-----------|-----------|------------|
| Common Practice | 75 | 90 | 90 | 90 |
| Procedure - CDSBEO | 60 | 60 | 60 | 60 |
| Procedure - UCDSB | 60 | 60 | 60 | 60 |

Seated Students Per Vehicle

| Activity | JK-3 | Gr. 4 - 6 | GR. 7 - 8 | GR. 9 - 12 |
|--------------------|------|-----------|-----------|------------|
| Common Practice | 69 | 69 | 69 | 52 |
| Procedure - CDSBEO | 72 | 72 | 54 | 54 |
| Procedure - UCDSB | 72 | 72 | 54 | 54 |

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