



Ministry of Education Effectiveness &
Efficiency Follow-up Review
Consortium de transport scolaire d'Ottawa

E&E Phase 4 follow-up review June 2010

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 Follow-up Review (E&E Review) of the Consortium de transport scolaire d'Ottawa (CTSO or the Consortium) conducted by a review team (E&E Review Team) selected by the Ontario Ministry of Education (the Ministry). The Consortium provides transportation services to le Conseil Scolaire de District Catholique du Centre-Est de l'Ontario (CECCE) and le Conseil des Ecoles Publiques de l'Est de l'Ontario (CEPEO). It also coordinates transportation services to the Centre Jules Leger.

The first E&E Review report was issued in April 2008 (the original report) and this follow-up report is intended to document the changes made by the Consortium to date. This report is designed to provide an overall assessment of the Consortium and outline the incremental findings and recommendations that were particularly noteworthy.

The E&E Review evaluates four areas of performance – Consortium Management, Policies and Practices, Routing and Technology use and Contracting practices - to identify whether the Consortium has implemented any best practices and recommendations from the original report; and to provide incremental recommendations on opportunities for improvement. The evaluation of each area was then utilized to determine an overall rating for the Consortium that will be used by the Ministry to determine any in-year funding adjustments that are to be provided.

Original review summary

In Consortium Management, key recommendations included a re-examination of the Consortium's entity status and the delineation between the Consortium's governance and management responsibilities. It was also recommended that the Consortium establish contracts with all entities from which it purchases services or to whom it provides services, develop policies and methods to monitor its organizational performance and the performance of its staff, and develop a robust long and short term planning process.

The Consortium was found to have some critical harmonized policies and clear, established policies on other items such as student behaviour and school closures. Key recommendations in the Policies and Practices area included the further integration of students from both Member Boards and a re- examination of the level of authority given to the Consortium to establish bell times.

The review of the Consortium's Routing and Technology use concluded that, while the Consortium's implementation of BUSTOPS and its interface with Trillium was a model for others to follow, the system was being primarily used to document existing runs and

routes with little ongoing analysis for the identification of potential gains in efficiency. As such, key recommendations included the proactive examination of run and route designs to maximize efficiency, the integration of students from different Boards at the run level, and the development of a school bell schedule that supports the use of alternative routing strategies.

The review of the Consortium's Contracting practices found that the Consortium neither had current contract documentation, nor had appropriate contract management practices in place. The Consortium also did not use competitive processes to procure operator services. As such, key recommendations included the timely, accurate execution of the Consortium's contracts, the implementation of competitive procurement processes for operator services, and the implementation of effective contract management and monitoring practices at the Consortium.

The Consortium was rated as **Moderate-Low** following the initial review.

Follow-up review summary

The Consortium has substantially implemented the recommendations made in the original report and is currently in line with industry best practices with respect to Consortium Management. The most significant improvements in this area include the attainment of separate legal entity status, the implementation of a comprehensive internal procedures manual and detailed documentation of the Consortium's HR practices. In sum, Consortium has developed and executed highly effective HR, risk, and planning processes and documentation.

Each of the original Policies and Practices recommendations has been addressed in a manner consistent with best practices. Of particular note is the implementation and adoption of the consolidated Policy and Procedure manual and the new Internal Procedures Manual. Significant effort has been expended on improving the ongoing route planning process and continuing these efforts must be an ongoing goal for management in addition to the integration of new staff members into the Consortium's practices.

Exceptional effort has been expended in improving the overall efficiency and effectiveness of the Consortium's Routing and Technology use. This was accomplished while also switching software systems and integrating several new staff members. The Consortium has demonstrated an ongoing commitment to completing these changes and utilizing the enhanced systems to continually improve performance in the future. Of particular note is the aggressiveness with which the Consortium has analyzed and implemented route system changes since the original review - analysis indicates that improvements in overall system efficiency and capacity utilization have resulted in the removal of 17 large vehicles from service. The Consortium's progress fully satisfies the

intent and expectations of the E&E process and their commitment to continuous improvement serves as a model to be emulated by other transportation consortia throughout the Province.

The process by which the Consortium negotiates, structures, and manages its Contracts for transportation services has been assessed as being highly effective and efficient. Positive elements include the execution of thorough operator contracts; the use of competitive processes to procure operator services; and highly effective contract management processes. In particular, the assignment of contract management processes to a dedicated staff member has been noted as an especially effective practice.

Funding adjustment

The E&E Review Team recognizes that the Consortium has made a significant effort to meet and exceed the recommendations outlined in the original report as well as industry best practices. The efforts of the Consortium in all areas, most notably in Contracts and Routing and Technology, also exhibit a positive attitude towards continuous, ongoing improvement - one of the key outcomes expected by the Ministry of the E&E Review process. In light of its achievements to-date, this Consortium has been rated as a **High** consortium. Based on this evaluation, the Ministry will provide additional transportation funding that will narrow the 2009-2010 transportation funding gap for the Consortium's member school Boards. The funding adjustments to be received are outlined below:

Conseil Scolaire de District Catholique du Centre-Est de l'Ontario: \$953,603

Conseil des Ecoles Publiques de l'Est de l'Ontario :\$1,161,374

1 Introduction

1.1 Background

1.1.1 Transportation Reform

The Ontario Ministry of Education has introduced significant education reforms over the past four years. One of the focuses of their reforms is in support of school board management processes and systematic review of school board business operations. Student transportation was the first “line of business” to undergo such a reform since 2006-07.

1.1.2 Follow-up Review

The Ministry has established a multi-phase approach to review the performance of consortia (collectively the “E&E Reviews”) across the province. CTSO was reviewed in Phase 2 of the E&E Reviews completed in May 2008. Based on the findings of the Phase 2 reviews, the Ministry provided a total of \$5.1M in additional funding to the reviewed boards. To encourage continuous improvement, the Ministry has decided to provide follow-up reviews.

The follow-up review was triggered at the request of the Consortium as they communicated they had made significant progress since the original review. The purpose of the follow-up E&E Review is to assess the extent of the Consortium’s progress and review evidentiary working papers to support that progress. The report therefore focuses on the incremental changes from the original E&E Review conducted in 2008.

1.2 Scope of Deloitte Engagement

Deloitte was engaged to lead the E&E Review 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 follow-up reviews for each of the transportation consortia to be reviewed in Phases three and four (currently in Phase 4);
- At the beginning of each 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 report for each consortium that has been subject to an E&E Follow-up Review in Phases three and four. The target audience for the report will be the Ministry, the Consortium, and its Member Boards. Once finalized, each report will be released to the consortium and its Member Boards.

1.3 Methodology and team used to complete E&E Reviews

1.3.1 Team & Methodology

The composition of the team and the methodology used for this follow-up review are the same as in the initial 2008 E&E Review. Please refer to the first report for a detailed description of the team and methodology. The same Evaluation Framework and Assessment Guide were also applied in the follow-up review to ensure consistency in evaluation. For each of the four sections examined in terms of Effectiveness and Efficiency, the existing operations have been analysed based on observations from fact (including interviews) in order to document progress incremental to the 2008 E&E Review. Observations which have been assessed as best practice are documented as accomplishments of the Consortium.

Areas for additional improvement have also been noted. In situations where there has been no incremental progress related to the recommendations from the 2008 E&E Review, those topics remain unaddressed in this report i.e., we have not reported on items that have remained at the same level of effectiveness and efficiency as the original report. The related recommendations from the 2008 report continue to be valid. Incremental accomplishments or areas for improvement are used to revise, as appropriate, the E&E assessment for each of the four sections. The criteria of an effective and efficient Consortium are summarized bellow:

1.3.2 Criteria for an Effective and Efficient Consortium

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 modelling 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

1.3.3 Funding adjustment

The Ministry will use the results of the E&E Reviews and Follow-up Reviews to inform any future funding adjustments. Only 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 Board ¹	Effect on Surplus Boards ¹
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 2009-10 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 boards that have not achieved a "high" rating in Routing and Technology from the Effectiveness and Efficiency reviews. 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.

1.3.4 Purpose of Report

This Report serves as the deliverable for the E&E follow-up review conducted on the Consortium by the E&E Review Team during the week of June 21, 2010.

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

1.3.5 Material relied upon

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

1.3.6 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 Management

2.1 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 – Original E & E rating: Moderate.

Consortium Management – New E & E rating: High

2.2 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.

2.2.1 Original recommendations

Transportation Coordinator from CEPEO

An effective governance structure calls for a clear line to be drawn between the governance committee and the management of the Consortium. This line is less easily determined when there is a management level position that executes both a monitoring function over, and management function within the scope normally reserved for the

Consortium in terms of analysing and reporting findings based on transportation data and involvement in addressing transportation related complaints. It is recognized that the responsibilities that the office of the CEPEO Transportation Coordinator executes are clearly required and value added; however specifically in terms of effective governance it is recommended that these responsibilities be documented and a clear division including appropriate assignment of governance versus management tasks be implemented.

2.2.2 Incremental progress

Governance structure

Discussions with members of the Governance Committee indicated that, since the attainment of separate legal entity status, its role has become increasingly independent from the Member Boards and is strategic in nature. The primary role of the Governance Committee is to review and approve policies and procedures, strategic and long term plans, and Consortium's performance tracking documents.

The Governance Committee is mandated to meet at least three times per year, although discussions with members of the Governance Committee indicated that, in practice, the Committee meets once a month for a day at a time. Meetings require a formal agenda and meeting minutes are taken, ratified and signed.

Discussions with members of the Governance Committee indicated that the Transportation Coordinator continues to play a governance role within the Consortium. This position's transportation responsibilities relate only to the provision of non-home-to-school transportation (such as school charters) for the CEPEO. These services are not part of the Consortium's mandate and are separate from the Consortium's operational and oversight functions.

2.2.3 Accomplishments

It is recognized that the Consortium now demonstrates the following best practices in addition to the best practices outlined in the original report:

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.

Definition of the role of the Governance Committee

Roles and responsibilities for the Governance Committee are clearly articulated in the Consortium Agreement and reflect a clear delineation between the Consortium's oversight and operational functions. This ensures that there is no ambiguity in their function, and also allows for effective and efficient decision making. This is a key element in effective and efficient governance and management.

2.3 Organizational structure

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

2.3.1 Original recommendations

Establishment of a Separate Legal Entity

The Partner Boards should explore the establishment of the Consortium as a Separate Legal Entity through incorporation to formalize and improve its current contracting practices. The creation of a Separate Legal Entity effectively limits risk to the Partner 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 a member School Boards. Over the long term, changing political environments and potential disputes amongst the Partner Boards could cause the current structure to destabilize. The formalization of the Consortium as an incorporation would provide benefits from an organizational perspective in terms of corporate continuity, staff planning, liability, contracting and management.

2.3.2 Incremental progress

Entity Status

The Consortium was incorporated as a separate legal entity in March 2010 with the primary objective of providing cost effective student transportation to its Member Boards.

The Letters Patent, Consortium Agreement, and Consortium Bylaws form the Consortium's foundational documents. Each of these documents is described in the following section.

Consortium formation and agreement

Letters Patent

The Letters Patent, submitted to the Ontario Ministry of Consumer and Business Services, establish the Consortium's status as a separate legal entity. The document describes the objectives of the organization and outlines specific provisions related to the Consortium's ability to accept gifts and donations, and to invest surplus funds.

Consortium Agreement

The Consortium Agreement (signed May, 2010) establishes the relationship between the two Member Boards and some aspects of the Consortium's operations. It speaks to, among other things:

- The purpose of the Consortium: to provide home to school transportation to its Member Boards;
- Consortium governance structures: the membership; roles and responsibilities of the Consortium's governance structures;
- The organizational structure of the Consortium, clarification with respect to the employment status of Consortium staff;
- Cost sharing arrangements between the Member Boards;
- The Consortium's responsibilities with respect to student databases and the implementation of transportation policies; and
- Other items related to the rights of Members, mandated insurance requirements, the term of the agreement, confidentiality, dispute resolution, termination, and severability.

Consortium Bylaws

The Consortium Bylaws provide additional detail with respect to the structure and operation of the Consortium. They outline, among other things:

- Additional detail related to the structure and operational processes of the Consortium's governance structures;

- Additional detail related to the roles of individual positions within the Consortium's governance structures; and
- Other terms related to notices; execution of documents; banking arrangements; and borrowing.

Organization of entity

The Consortium's organizational structure has not changed significantly since the original E&E Review. Job descriptions that outline each position's specific responsibilities; decision making authorities; required qualifications; skills and reporting/delegation authority are currently available for all staff members except the Transportation Officer responsible for managing CECCE's busses. All staff are currently seconded to the Consortium from the CECCE as identified in the Consortium Agreement. Secondment agreements for these employees have been signed with the CECCE; these agreements are renewed annually.

2.3.3 Accomplishments

It is recognized that the Consortium now demonstrates the following best practices in addition to the best practices outlined in the original report:

Separate Legal Entity

The Consortium is incorporated as separate legal entity and is located in a different building from its member school boards. This structure provides the Consortium with independence in terms of managing its daily operations; ensures that the structure and mandate of the Consortium remains consistent despite potential changes at Member Board level (i.e. changes in trustees, Board members, etc.); and also provides contractual benefits to the Consortium. As a separate legal entity, the Consortium can enter into binding legal contracts for all services purchased, including bus operators, and as such, is limiting liability to its Member Boards.

2.4 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.

2.4.1 Original recommendations

Contracts for Support Services

There is no contract between CECLFCE² and the Consortium for administrative services which CECLFCE provides to the Consortium. It is recommended that for any service the Consortium procures, an agreement or contract be signed by both parties to document their mutual obligations. In this case, a signed contract or agreement protects the Consortium's rights to ensure that it receives the level of services it would otherwise receive from a third party service provider. This is especially important in terms of, for example, the priority which the CECLFCE would give to the Consortium for fixing a significant system failure in times of competing priorities or the binding of the CECLFCE IT staff to confidentially agreements related to the CEPEO student information which they can access through their roles in system and database support. While there was no indication that service expectations were not being met, we nevertheless feel that it is prudent for service contracts to be in place.

Board Leased School Buses and Board Employed Drivers

It is understood that the intention is to continue leasing school busses for School Board employed drivers and to purchase the buses upon lease termination to the extent required until the Board employed bus drivers decide to retire. It is recommended that the decision to incur costs related to bus ownership be properly supported through an analysis that accounts for all relevant costs and alternatives. Given the institutional knowledge of the drivers employed by the School Board, in terms of their familiarity with the bus routes, bus safety and other regulatory requirements associated with the provision of transportation services, consideration should be given to the merits of matching that capacity and experience to the needs of the consortium such as regular and efficient execution of route audits.

Staff Performance Evaluations & Monitoring

We noted that the staff performance evaluation framework is well designed for a generic audience and to satisfy the needs of multiple departments within the CECLFCE Board. Performance evaluations are a powerful tool to guide and encourage employees to keep the goals and objectives of the overall Consortium in mind during day to day operations. It reflects the adage that what is monitored gets managed. There is also an element of technology in the Consortium that is more predominant in importance

²Equivalent to CECCE (Conseil Scolaire de District Catholique du Centre-Est de l'Ontario), board was referred to as CECLFCE in the initial E&E Report

compared to the departments of the CECLFCE Board where the evaluation framework is used; likewise the goals and objectives of the Consortium are very specific compared to the rest of the Board and the Consortium should consider integration of the goals and annual strategic objectives of the Consortium in customizing the performance evaluation frameworks. These goals should be communicated to staff so they are aware as to what objectives they are collectively being measured against.

Monitoring of Key Performance Indicators (“KPIs”)

We acknowledge the recent and significant effort which the Consortium has put forth to determine the KPIs it will monitor. As this process continues to evolve, and in support of the KPI monitoring plan, we suggest that the KPIs be further analysed to determine the frequency of monitoring and the quantitative thresholds for changes in KPIs above which further action will take place. The recommendations here relate to the formalization of a monitoring, documentation, and response protocol.

Long Term and Short Term Planning

Although the Governance Committee and the Consortium have already taken steps to develop the goals and objectives of the Consortium, the process should be extended to include development of implementation plans. The implementation plans should help differentiate between issues that need immediate attention and those which can be addressed over a longer term. This process will also assist in identifying key tasks and responsibilities that need to be assigned to specific Consortium personnel; eventually these tasks can be linked to staff performance plans and evaluations. It is also essential that the Governance Committee and the Consortium take the time to review the short and long term goals of the Consortium, ensuring that changing business and regulatory environments are reflected in their operating procedures.

2.4.2 Incremental progress

Cost sharing

A cost sharing agreement for the Consortium is outlined in the Consortium Agreement. The Consortium’s operating costs are shared according to the number of runs allocated to each Member Board for each route³. Shared runs are split according to the number of students from each Member Board that are allocated to that run as of October 31st of each year.

³For example, if one route is comprised of three runs, with two runs for the CEPEO and one run for CECCE, then the cost sharing ratio is two-thirds/one-third respectively

Administrative costs are shared according to the number of students in the data base from each Member Board as at October 31st of each year.

Purchase of service agreements/support services

The Consortium purchases non-transportation services from three primary sources – the CECCE; GEOREF; and a realty company from which office premises are leased.

The Consortium receives accounting, payroll, purchasing, IT, HR and archiving services from the CECCE. The purchase of service agreement with the CECCE is valid for one year and five months commencing May, 2010 with an option to automatically renew the contract for the following three years. Additional clauses relating to dispute resolution; confidentiality; and ownership of data are included using references to the Consortium Agreement. A payment schedule is also included in the contract. Compensation for these services is provided through an indexed annual fee.

The Consortium, through its Member Boards, has signed a standard lease with its landlord and a standard implementation contract with GEOREF systems.

Discussions with Consortium management indicate that the Consortium has contracts in place for all consulting services that it has received. These discussions also indicated that while the CECCE continues to own their own vehicles, there is an agreement between the Member Board and Consortium indicating that the Consortium is responsible for the management and maintenance of the assets.

The Consortium receives transportation services from the Ottawa Carleton District School Board based on a contract between that School Board and the Consortium's Member Boards. This contract is yet to be transferred to the Consortium. The contract outlines the term of the agreement, the fee structure for services provided, and includes clauses requiring compliance with the laws of Canada and Ontario.

Transportation service agreements

The service level expectations of the Member Boards with respect to student transportation services provided by the Consortium are outlined in an appendix to the Consortium Agreement.

The Consortium also provides transportation to the Centre Jules Leger, for which a transportation service agreement is in place. The contract outlines the term of the agreement, the payment structure for services provided; and includes a provision for its automatic renewal.

Insurance

The Consortium has purchased insurance through the Ontario School Boards' Insurance Exchange (OSBIE). This insurance is valid for one year expiring on January 1, 2011 and includes coverage for, among other things, personal and property damage; errors, omissions and malpractice; non-owned automobiles, and contractual liability. The review of the Consortium's insurance needs is included as an item in the Consortium's annual planning calendar.

Staff performance evaluation, training and management

Consortium staff are to be evaluated in line with, and using the criteria identified by, the CECCE. Evaluations take place annually and are to be conducted by the employee's immediate supervisor. Criteria against which staff are evaluated include communication skills, technical abilities, managerial abilities and general conduct.

The evaluation of the Director is done annually and is the responsibility of the Governance Committee. The Consortium's performance against select KPI's are included in the criteria against which the Director's performance is evaluated.

The Consortium's internal policy manual includes a policy on staff training. This policy states that staff training is to be provided on a regular, scheduled basis and that the provision of this training is the responsibility of the Director. Training that has been received by Consortium staff primarily includes training on the use of technical and office productivity software. Staff training is tracked using the Consortium's annual staff review process.

Staff cross training is ensured through variations in the job specifications for each route planner. Discussions with Consortium management indicated that all route planners have a core set of responsibilities and an additional, varying set of specific responsibilities within the Consortium. Cross training is ensured by rotating the variable element of this job specification. Information about the methodologies and techniques used by the safety officer are conveyed to other employees through presentations made by the safety officer to other Consortium staff. Cross training for other positions is addressed through the Consortium's succession planning process.

Key performance (service) indicators (KPIs)

The Consortium has a documented, governance approved policy on the use of KPIs to assess its own operational performance. The Consortium also regularly reports these KPIs to the Governance Committee.

The policy on KPIs identifies the KPIs that are to be monitored by Consortium management and also identifies the frequency with which they are to be reported. Listed below are some of the KPIs identified in the policy.

- Ridership information (total riders, eligible students etc)
- Incident reports
- Costing information
- Run and route statistics
- Transportation quality information based on route audit assessments
- Customer service information (such as number of calls received and complaint response times)
- System performance/ data quality
- Route performance
- Average statistics about vehicles and other statistics (such as total number of vehicles in operation and vehicle use)

A policy that identifies the thresholds for changes in KPIs that are to be reported to Consortium governance is in place. Discussions with Consortium management and a review of meeting minutes indicate that a KPI report is presented to the Governance Committee on a monthly basis along with an explanation of variances from previous reports.

Long term and short term planning

The Consortium has a three year strategic plan and an operational plan in place on which follow up is conducted semi-annually by the Governance Committee. The Consortium's strategic plan states that specific objectives are to be drawn down into a yearly plan that will guide the Consortium's performance and budgeting decisions.

The Consortium's planning process incorporates input from all Consortium staff and, once completed, the compiled plan is submitted to the Governance Committee for approval. The plan includes timelines for reporting and the review of objectives.

The Consortium's strategic plan for 2009-12 identifies the Consortium's core vision and mission and organizes its objectives in a structure that is comparable to that used for E&E Reviews (i.e. Consortium Management, Policies and Practices, Routing and Technology, and Contracting practices). Specific objectives include, among other things, the attainment of separate legal entity status and the implementation of competitive processes for the procurement of operator services.

The Consortium's strategic objectives are translated into an operational plan that identifies specific activities to be undertaken toward reaching the objectives, the person responsible for each task, and the timeline over which progress on each task is to be reported.

Discussions with Consortium management indicated that the Consortium does not currently have a formal plan for managing the financial impact of declining enrolment since enrolment in its service area is increasing. Consortium management indicated that they are asked to provide extensive input into decisions that impact student transportation that are made at the Member Board level.

Procurement policies

The Consortium has a procurement policy in place that mandates the procurement processes to be used for purchases within specified dollar amounts. It states that all purchases over \$50,000 are to be procured through a formal, advertised request for tender or proposal.

The policy provides the Director, in consultation with the Governance Committee, with the discretion to make purchases through alternative means including sole source purchases, and also contains provisions for emergency purchases. Other parts of the policy identify desired supplier characteristics and a code of ethics; outline specific steps to be used during the RFP/tendering process; provide guidance with respect to conflicts of interest and dispute resolution; and identify the rights of Consortium management with respect to the purchase or disposal of surplus equipment.

Discussions with Consortium management indicated that, in line with its procurement policies, exceptions to the \$50,000 threshold for RFP issuance have been granted by the Governance Committee on a limited and exceptional basis. While the approval of such exceptions is documented in the meeting minutes of the Governance Committee, no additional documentation regarding the rationale for this approval is retained by the Consortium.

Information management

The Consortium has a governance approved policy with respect to the confidentiality and treatment of information. These policies acknowledge the confidentiality of all information obtained by the Consortium, require compliance with all legislation related to the use, disclosure and destruction of personal information, lay the foundation for the execution of confidentiality agreements with all Consortium staff and operators; and outline the processes and ownership rights associated with the Consortium's management of student data. The annual review of this policy by the Governance Committee is included as part of the Consortium's annual planning calendar.

2.4.3 Accomplishments

It is recognized that the Consortium now demonstrates the following best practices in addition to the best practices outlined in the original report:

Purchase of service agreement/Support Services

Purchase of service agreements are in place between the Consortium and all of its service providers. These agreements outline the scope of the services to be provided and the manner in which the suppliers are to be compensated for these services. Clear contracts, ensure required services are satisfactorily provided to the Consortium, and decrease the chances of misunderstanding.

Transportation service agreements

The Consortium Agreement specifies the transportation services that are to be provided by the Consortium to the Member Boards. The scope of services to be provided, fees, insurance/liabilities, quality of service, dispute resolution and terms have also been clearly articulated and agreed upon prior to the delivery of service.

Insurance

The Consortium has obtained insurance coverage and coverage needs are periodically reviewed. In addition, each school board carries its own insurance. Insurance coverage is essential to ensure the Consortium and school Boards each are suitably protected from potential liabilities.

Staff Performance Evaluation, Training, and Management

Staff performance evaluations are conducted on a regular basis with a clear, easily understood framework. The metrics which are used are supportive of the goals and objectives of the Consortium. Likewise staff training is provided on a regular basis and is tracked internally; training goals are aligned with overall Consortium strategy and objectives which is important to ensure alignment between efforts and goals.

Succession Planning Documents

The Consortium has developed a formal succession plan that will help ensure the continued smooth operation of the Consortium should staff members depart or be absent.

Long Term and Short Term Planning

The strategic planning process is repeated regularly, outlines the strategic initiatives of the Consortium for the upcoming year, and is regularly reported to the Consortium's stakeholders. This drives continuous improvement within Consortium operations and

gives the staff a broader view of the organization's contributions to stakeholders. It also contributes to a corporate culture of continuous self-assessment and improvement. It is suggested; however, that the Consortium develops a governance approved policy that outlines the process and timelines over which such strategic and operational plans are to be developed.

Key Performance Indicators

The Consortium makes extensive use of available data in both the course of the annual transportation planning process as well as a tool for operational efficiency assessments. Formally monitoring a relevant portfolio of KPIs allows the Consortium to quantify its performance and generate realistic business improvement plans.

Procurement policies

The Consortium has clear procurement policies in place with purchasing thresholds associated with various procurement methods. The availability of these policies ensures that procurement methods are fair, transparent and in-line with requirements set out in the Ministry of Finance **Supply Chain Guideline**.

Information management

The Consortium has developed governance approved policies related to the use of confidential information and has confidentiality agreements in place that help to ensure the confidentiality of all information. In addition, these policies also require Consortium governance to review and reflect on freedom of information and privacy legislation requirements on a regular basis.

2.4.4 Opportunities for Improvement

Identify the correct parties on all contracts

A number of the Consortium's contracts, including its purchase of services agreements with the Ottawa Carleton District School Board, its landlord and GEOREF systems, are currently executed through its Member Boards. The Consortium should continue the process of updating all contracts to reflect its recent attainment of separate legal entity status by identifying itself as the purchaser of these services on behalf of its Member Boards. Identifying the correct parties on all contracts allows the Consortium to make use of its contractual advantages as a separate legal entity and also bolsters its risk management efforts by limiting liability to its Member Boards.

Document the rationale for granting exceptions to the procurement policy

The Consortium's current procurement policies provide the Director with the discretion to use alternative procurement methods for purchases above \$50,000 provided that

these exceptions are approved by the Governance Committee. While the approval of these exceptions is documented in Governance Committee meeting minutes, it is recommended that the Consortium bolster its risk management efforts by also documenting the rationale for why exceptions are granted. This documentation can either be included as part of the documentation provided to the Governance Committee, or through the use of a form similar to that currently used for requests for verbal quotations.

2.5 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.

2.5.1 Incremental progress

Audit

Governance Committee meeting minutes indicate that the Governance Committee has evaluated the Consortium's audit requirements and has engaged a third party auditor in order to verify the accuracy of its financial reports.

2.6 Results of E&E follow-up review

Consortium Management has been assessed as **High**. The Consortium has, to a substantial degree, successfully implemented the recommendations made in the original report and is currently in line with industry best practices with respect to Consortium Management. Particularly noteworthy developments include the attainment of separate legal entity status and the development and execution of effective HR, risk, and planning processes and documents. The Consortium should continue the process of documenting its internal processes and updating all of its contracts to reflect its status as a separate legal entity.

3 Policies and Practices

3.1 Introduction

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

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

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

Policies & Practices – Original E & E: Moderate

Policies & Practices – New E & E Rating: High

3.2 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.

3.2.1 Original recommendations

Consolidate Individual Board Policies into a Consortium Policy Manual

The consolidation of all policies and operational procedures, approved and supported by the Partner Boards, is recommended to ensure the consistent and equitable application of service. It is evident that much effort has been devoted to the development of comprehensive policies and procedures and that practices have been documented. The harmonization of policies aids in the fair and equitable application of practices to ensure that equal service is delivered to Partner and Service Purchasing Boards. An ongoing review of all policies and practices is necessary to ensure that long standing practices and operational procedures continue in the event of a change in Consortium or Board management. Bell time management is one example of a practice, vaguely supported by policy, which must rely on the established goodwill and co-operation of the Boards. Other examples include the discrepancy between planning policy statements (arrival and departure windows and vehicle loading) and the Board Profile information that is presented to the Ministry. The impact of separate route planning for each of the Partner Boards with limited sharing of runs should be analyzed to determine its impact on the overall efficiency of the Consortium. This will be discussed in further detail in the following section specific to Routing and Technology.

Routing

Opportunity exists for the Consortium to elevate sharing of resources beyond the current level. The fundamental philosophy in building stops, runs, and routes is based on segregating the systems of each

Board. The integration happens at the route level but does not exist at the run level. Such duplication is of particular concern given the large geographic area that must be serviced. A primary benefit of integrating the runs is the opportunity to put more students on any given run, which would improve the overall use of seating capacity. Improving the use of seating capacity and eliminating the time required to return to the same neighbourhood multiple times should also provide the opportunity to reduce the number of buses required and thus reduce expenditures. This change would also require a detailed consideration of bell time changes to support the integration of multiple schools on the same bus where appropriate.

3.2.2 Incremental progress

Consolidate Individual Board Policies into a Consortium Policy Manual

The Consortium now operates under the umbrella of a consolidated and expanded Policy and Procedures Manual. This is a newly drafted document that consolidates and

expands upon the harmonized policies reviewed during the original review. It incorporates the harmonized policies for both Boards, and includes several new and enhanced policy and procedure statements. It has been recently adopted and approved by both Member Boards.

Within this manual are several notable additions and changes. These include the following statements that address the specific concerns of the original recommendation in this area:

- The revised bell time management policy is clearly documented and includes a specific process for initiating and approving changes to bell times by either the Consortium or Board. The policy includes timeline standards, the requirement for an impact analysis to be completed, and establishes that the final decision rests with the Governance Committee.
- Harmonized arrival window policies and vehicle loading parameters have also been adopted and documented.
- Other notable statements in the new manual include the following:
 - A specific process for appealing decisions made by the Consortium;
 - Several safety-related statements including: Procedures for Accidents or Incidents; Transportation Cancellations Due to Inclement Weather; Missing Child Procedures; and Video Cameras on School Buses.
- A comprehensive section describing the responsibilities of all parties, including the Consortium, parents, student riders, school building administrators, and student safety patrol representatives; and
- A new section devoted to the unique requirements of special needs transportation.

The new Consortium Policies and Procedures manual provides comprehensive and clear guidance to all users and stakeholders in the transportation system. It provides a single, harmonized set of policies and operating parameters for both Member Boards and covers all aspects of Consortium operations. This manual meets the intent of the original recommendation.

Routing

For special education route planning, interviews indicate that integration of special needs students at both the run and route level occurs across the service area whenever time and distance constraints permit. For regular education students, interviews also indicate there are no restrictions placed on planning for the integration of students from each of the Boards wherever feasible. Integrated planning at the run level must be facilitated, however, by appropriate coordination of school bell times, which requires a more strategic outlook and comprehensive system-wide planning. The new bell time policy provides the mechanism to facilitate this type of analysis by the Consortium. Now that the policy is implemented, further analyses of bell time changes can be undertaken in future planning cycles.

An analysis of the routing system was completed in May 2009. The purpose of this study was to determine the feasibility of run and route integration in addition to other routing strategies. The analysis was conducted concurrently with the implementation of other routing changes that were designed to improve the overall level of capacity utilization on individual bus runs. The results of the analysis indicate that the feasibility of integration on individual bus runs is somewhat limited by existing time and distance constraints and the number students transported to schools representing each of the Member Boards that are also located in reasonably close proximity.

Based on the above, it is concluded that route planners do consider integration at both the run and route level when possible, but that opportunities identified thus far have proven to be limited. Further discussions and ongoing analysis by staff revealed that integration on small vehicles is a more achievable goal, and this strategy is now utilized whenever possible. Many other changes to the route system have been implemented with positive implications for overall system efficiency, as discussed further in the **Routing & Technology** section.

3.2.3 Accomplishments

Consortium Policy Manual

In addition to the new Consortium Policy and Procedure manual, a newly drafted Internal Procedure Manual has also been adopted for use by staff. This document provides additional support for the implementation of the Consortium's policies, and also provides a ready reference for staff concerning the day-to-day operations of the Consortium. A review of the manual indicates that many important topics are covered, both to enhance the policy manual and to provide specific guidance on internal consortium operations. Notable examples of topics covered by this manual include the following:

- A communication plan to describe a regular program of outreach and information dissemination together with acceptable communications standards for staff;
- Specific instructions regarding the management of student data throughout the organization;
- Standards for the management of bus run and route design;
- Transportation planning schedules and calendars;
- Key performance indicators; and
- Bus contractor audits and performance measurement.

This is a comprehensive tool, and is particularly valuable given the high turnover of Consortium staff since the original review. It provides a reference to ensure that standards are maintained and established processes continue even as new staff members are integrated into the operation. The development of this manual provides an excellent example of the continuous improvement cycle necessary for ongoing high performance, and represents a best practice to be emulated by other transportation consortia.

Routing

Ongoing efforts by Consortium management and staff to improve system-wide efficiency have yielded impressive results. Overall capacity utilization on buses and small vehicles has improved tremendously, and 17 large buses have been removed from service as a result. In addition, the consortium has demonstrated its commitment to ongoing improvement through the implementation of new routing software and related technologies. The software now in use greatly facilitates enhanced management and evaluation of the routing scheme. Of particular note is the consortium's recent and ongoing incorporation of GPS technology into the system. Management has committed to putting GPS hardware on the entire bus fleet, and is integrating its use into the BusPlanner routing software. Over time, this will provide a very valuable operational and management tool to enhance and improve routing performance. These results are discussed further in the context of an evaluation of overall system efficiency and effectiveness in the Routing and Technology section.

3.2.4 Opportunities for improvement

Continue efforts to implement the consolidated Policy Manual

The entire policy manual and accompanying internal procedure manual have only recently been formally adopted by the Consortium and the Governance Committee. Full implementation to where all staff are thoroughly familiar with, and routinely applying the

documented policies and procedures in their day-to-day activities must be an ongoing priority for management, particularly given the preponderance of new staff in the Consortium. An additional challenge will be faced in maintaining these comprehensive documents to ensure ongoing accuracy and relevance. For example, the Internal Procedures Manual contains references to specific staff, staff assignments, and planning dates. These will have to be monitored and updated on a regular basis to ensure that this manual remains accurate and relevant.

3.3 Special Needs and Specialized Programs

3.3.1 Original Recommendation

Special Education Policy and Procedure Refinement

The development of a set of comprehensive written policies and operational procedures that govern every aspect of special needs transportation will ensure that a high level of service is delivered regardless of the operator or in the event of a change in Consortium management. One example is the administration of medicine for students with anaphylaxis. CECLFCE policy statements indicate that the principal is responsible for “regular training of all employees and other individuals who are regularly in contact with students such as school bus transportation services”. CEPEO policy statements are silent on the use of an EpiPen or its management on a school bus.

3.3.2 Incremental Progress

A section has been added within the new Policy and Procedures Manual that contains policies specific to the provision of Specialized Transportation. Notable examples of statements added to this manual include:

- The use of car or booster seats;
- The request procedure for specialized transportation;
- A common anaphylaxis procedure including the documented responsibilities of parents, bus drivers, dispatchers, and CTSO;
- Emergency, CPR, and First Aid procedures and training requirements;
- Service dog procedures;
- The use of a harness;
- The process for the assignment of an adult aid as required; and
- EpiPen emergency requirements.

A number of the formal policies are also further enhanced with expanded procedural information for staff in the Internal Procedures Manual. Collectively, the new policies and procedures are comprehensive and specific to the special needs population. The new documents meet the intent of the original recommendation.

3.4 Safety Policy

3.4.1 Original Recommendation

The Creation of Safety and Training Policies

While the Consortium has demonstrated a commitment to the development and support of ongoing safety training and awareness programs, it is recommended that a comprehensive Safety and Training Policy Manual (as a component of an overall Policy Manual) be developed that fully encompasses all safety and training elements required by the Consortium including:

- Operators responsibility for the training of new and returning drivers;
- Driver training auditing to ensure that training is consistent between operators; and
- The identification of opportunities to promote school bus safety to the general community by active participation on local traffic and safety committees.

3.4.2 Incremental Progress

While a separate Safety and Training section was not included in the new Policy and Procedure manual, Consortium management has demonstrated its commitment to implementing this recommendation through the incorporation of safety and training requirements throughout the organization and its supporting documentation. Within the common operator contracts, driver training requirements have been clearly documented and include elements specific to:

- The transportation of special needs students;
- First Aid; CPR;
- EpiPen training; bus evacuation procedures; and
- How to manage student behaviour.

Annual training and additional training required on a three year basis include refreshers in each of these areas plus a program focused on defensive driving. To ensure

compliance, the Consortium has assigned overall responsibility for monitoring and auditing compliance by each of the operators to a single route planner.

Several elements of the new Policies and Procedures Manual and Internal Procedures Manual address safety considerations. Additional documentary evidence of the Consortium's dedication to safety was presented for review, including:

- The number of bus patrollers trained per building, an introductory letter to help establish school safety patrols, an agenda for Bus Safety Patrol day, and a comprehensive bus patroller manual;
- An agenda for the School Bus Safety Awareness Day, which targets first time riders;
- The number of students attending training at each site and school location;
- A basic First Aid training agenda; and
- A safety training agenda for drivers.

Annual training updates for Consortium staff have also been upgraded, and include subjects such as: managing student behaviour, human rights, bus evacuation, the use of an EpiPen; and missing child or incident procedures. Collectively, the revised and enhanced safety and training documentation, the assignment of safety and security duties as a collateral responsibility for one of the route planners, and the demonstrated commitment to engendering a safety focus throughout the organization and its operations meets the overall intent of the original recommendation.

3.4.3 Accomplishments

Safety policies

A significant enhancement to the Consortium is the assignment of a route planner with collateral, but significant responsibilities for safety and security. This new staff member has devoted the majority of his first 10 months of employment to designing and implementing several processes and procedures that help to ensure operator compliance with contractual requirements. These include the student safety patrol program and regular notification/communication of important issues. One example provided during interviews that demonstrates the Consortiums thoughtful consideration of safety issues is the prohibition on drivers providing students with candy in order to prevent the possibility of a student having an allergic reaction.

A regular schedule of route audits has also been implemented and includes documentation of current compliance issues, and scheduling of follow-up discussions

and audits to ensure completion of corrective actions. A high level of care is exhibited to ensure that an equitable number of audits are conducted for each of the Member Boards' bus runs.

3.5 Results of the Follow-up E&E Review

CTSO has been rated as a **High** for Policies and Practices. Each of the original recommendations has been addressed in a manner consistent with the best practice expectations of the E&E process. Of particular note has been the implementation and adoption of the consolidated Policy and Procedure manual, and the new Internal Procedures Manual. Significant effort has been expended to redesign the route system to achieve high rates of capacity utilization, and to improve the ongoing route planning process. Continuing these efforts must be an ongoing goal for management together with the integration of several new staff members while continuing to ensure high quality service delivery.

4 Routing and Technology

4.1 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 & Technology – Original E & E Rating: Moderate-Low

Routing & Technology – New E & E Rating: High

4.2 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.

4.2.1 Original Recommendations

System Coding Enhancement

The Consortium should expand its coding structure using a hierarchical approach that would enable the analysis of specific subsets of data. The goal of the coding structure is to provide a progressively more detailed indication of whether a student can ride the bus, why the student rides, where the student goes, and what is required to deliver them to their program. Therefore, a hierarchal structure that looks at eligibility for service, the type of service provided (i.e., regular or special education), the nature of the service (i.e., hazard, courtesy, or a specific program), and the equipment that may be required (i.e., wheelchair, monitor, etc) would allow Consortium staff to more fully and readily analyze the types of service being provided. This would further allow more detailed reporting on the impact that different routing strategies would have on student populations under different routing scenarios.

Formal Training Program

The Consortium has demonstrated success in hiring capable personnel and providing on the job training and the sharing of expertise in the use and operation of the BUSTOPS routing software. Institutionalized regular training on all facets of the student transportation industry including route planning and analysis would serve to further advance the capabilities consortium staff. Given the expertise of the current employees, much of the training can be provided internally with support from outside resources including the providers of the routing software, representatives from the Operators, business officials from the Partner Boards, and other industry experts. The goal of this training would be to continue to support the realignment of strategic planning responsibilities as discussed below.

Alignment of Responsibilities

The Consortium should establish a process that allows Transportation Agents to utilize the routing software to proactively analyze alternative routing approaches. Realigning responsibility for strategic analysis would allow the Consortium to capitalize on its high level of user competence while more effectively rationalizing senior management duties.

4.2.2 Incremental Progress

System Coding Enhancement

The newly drafted Internal Procedures Manual provides a comprehensive listing of the “Travel Codes” established within the *BusPlanner* software. These are user-defined codes that serve to supplement and refine the system-generated “Eligibility Codes”. The eligibility code for any particular student is automatically assigned based on the criteria

established within the software by the Consortium for allowable walk distances, hazardous walking conditions, and attendance boundaries. The travel codes are manually assigned to provide a more refined understanding of a student's transportation situation.

These two primary codes are further supplemented with the coding for school of attendance and special equipment needs established by the Consortium in *BusPlanner*. Together, this coding scheme provides for the hierarchical structure called for, and meets the intent of the original recommendation.

Interviews with staff generally indicate a clear understanding of both the importance of using the coding structure properly, and the actual codes in use. Table 2 below provides a cross-tabulation of Eligibility codes and Travel codes for all students in the database. The following additional observations are provided relative to the coding structure.

There is some duplication between the two coding levels. For example, the eligibility code "HAZ" is assigned to students who are eligible for transportation as a result of hazardous walking conditions. The travel code "BH" provides the same indication. As can be seen in Table 2, 110 students are assigned to the "BH" travel code without a corresponding "HAZ" eligibility code. As a result, the status of these students is unclear to the casual observer. However, Consortium management reports that there is an underlying logic to this structure, and that each combination of codes is meaningful and necessary for day-to-day operations. Examples provided of how this coding helps staff clearly identify a particular student's status include:

- Identifying when a student's eligibility is "out of boundary" but is being transported on a bus (whether hazard or not); and
- Identifying when a student is walking from a babysitter's address within the school assigned boundary.

Thirteen of the 31 travel codes have fewer than 50 students assigned. Each of these codes represents less than 0.2% of all students, bringing into question the relevance of these codes. Yet, similar to the example above, management reports that these are necessary and valuable coding combinations, primarily for reporting and financial reasons. This customization of the coding called for in the original recommendation to meet the local needs of the Consortium is in keeping with the overall intent of the E&E process, and meets the intent of the original recommendation.

Table 2: Cross Tabulation of Eligibility & Travel Codes - All Students

Travel Code	BUS	HAZ	OOB	OOD	WLK	(blank)	Grand Total
B	13447	29	59	8	11	14	13,568
BAS			50	1	6		57
BFR	6	1	15		1	1	24
BG	12	4	346	14	63		439
BH	86	1,470	3		18	3	1,580
BL			3		31		34
CE			8	86		2	96
CGP			45	1			46
CT	10	1	32		362		405
CT-HS			12				12
G	651	68	294	9	179	1	1,202
HT	25		961	28	10	2	1,026
LN			42				42
M	15	5	18		2,999		3,037
MG	15	4	13	3	18		53
OC 23			15				15
OC CONC		1	94	1	1		97
OC LEDUC			10				10
OC MED			1		5		6
OC SFA			14				14

Travel Code	BUS	HAZ	OOB	OOD	WLK	(blank)	Grand Total
OCA	1,358	130	1,241		9		2,738
OCE	18		1				19
OCM	167	1	25	1	25		219
PT	778	79	194	5	11	1	1,068
Q				6			6
T CONC			19				19
TCM	14	2			40		56
TRV	225	7	24				256
TSPV	35	3	231		4	4	277
TSPV23			45			1	46
Grand Total	16,862	1,805	3,815	163	3,793	29	26,467

Formal Training Program

Significant changes have occurred within the Consortium since the original review with respect to both personnel and technology. First, the *BUSTOPS* program was replaced with the *BusPlanner* suite of routing software and related products. Second, many of the route planners in place and to whom this recommendation was targeted have retired and are no longer employed by the Consortium. That said, the intent of the recommendation remains sound and applicable to the current situation.

The Consortium has followed a consistent approach to the provision of training for its new staff members. This includes initial off-site training for each new route planner, provided by the software vendor, on the use of the routing software. Following this training, each route planner is provided with an area of responsibility for day-to-day planning and operations. Over time, as the planner gains experience, additional responsibilities are added both in route planning and collateral areas such as website maintenance and safety.

Changes to the training protocol also included the development of a comprehensive Internal Procedures Manual, as described in the *Policies & Practices* section. The procedures manual describes how to conduct many of the routine processes relevant to the new route planners, including (but not limited to) the management of student lists, *GeoQuery* account management, *Trillium* updates, and special needs planning parameters. As such, it serves as a ready reference for all aspects of Consortium operations.

Interviews with staff indicate a high level of comfort and satisfaction with the training that has been provided and the support that they receive on a continual basis from the Consortium's senior management. Through these processes and tools, the Consortium meets the intent of the recommendation.

Alignment of Responsibilities

Implementation of this recommendation has been complicated by the turnover in staff at the Consortium due to retirements and the changeover to a new routing software system. Nevertheless, Consortium management reports that some route planners have reached a point in their development of skills where they can produce reports in the *BusPlanner* software and conduct strategic route planning. Interviews and observations indicate a disparate level of competence in system use among the route planners, but a common commitment to improve and continue their training and development will ensure that all planners acquire the skills and ability to implement strategic route planning.

4.2.3 Accomplishments

System Coding Enhancement

The revised and enhanced student coding structure represents a best practice to be emulated by other consortia. In addition to the enhanced student coding structure, the Consortium has also added a new coding structure for schools and a revised and enhanced coding structure for bus runs and routes. While not directly related to the original recommendation in this area, these changes also add a significant benefit to the overall utility of the coding structure in use at the Consortium. This utility is further illustrated in the analysis of system effectiveness in that the system now lends itself to enhanced and more detailed analysis as a result of the changes.

4.2.4 Opportunities for Improvement

Alignment of Responsibilities

The turnover in staff, coupled with the implementation of a new software product and the focus on implementing the recommendations of the original review, has produced a

situation where the Consortium has been in a continual state of change. Indeed, one route planner position was still vacant even at the time of the Follow-up E&E review. Many additional pressures and responsibilities have been placed on the Consortium's senior staff and managers as a result. It will be imperative that the new staff begin to assume additional responsibilities as soon as feasible to ensure that the realignment of strategic planning responsibilities be consistent with the original review's recommendation regarding alignment of responsibilities going forward.

4.3 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.

4.3.1 Original Recommendation

Student Data Management

The integration of BUSTOPS and Trillium is a model for other Consortia using this combination of software. The Consortium should make it a priority to complete the transition to real-time updating for CEPEO, which will ensure that student data is timely and accurate regardless of which Board or school the student attends. A detailed implementation plan should be established that sets timelines, responsibilities, testing requirements and any financial resources that will be necessary to fully implement the updated software version and the associated interface.

4.3.2 Incremental Progress

Student Data Management

The changeover to the *BusPlanner* software suite does not negate the relevance of this recommendation. Currently, as a result of the change in routing software, only manual student updates are performed, and this is accomplished on a weekly basis. The Consortium is working in conjunction with *GEOREF* to implement a real-time interface that will fully automate the process of passing student data between *BusPlanner* and *Trillium*, but this is not yet completed.

The operational implication for the Consortium of the manual data update is not very severe. Current practices have all changes to student records initiated at the Consortium, whose staff enter the change into *BusPlanner* and *Trillium*. New student records are added at the schools, but also temporarily in *BusPlanner*. The weekly

download process overwrites the new student records in *BusPlanner* and also processes deleted students.

4.3.3 Opportunities for Improvement

Complete the development of the real-time interface between BusPlanner and Trillium

The Consortium should strive to complete the development of the real-time interface between *BusPlanner* and *Trillium* software packages as rapidly as possible. While current processes limit the negative impact, there is still a duplication of effort and opportunities for the introduction of errors that would be eliminated or greatly reduced through the prospective interface. This was the intent of the original recommendation, and full implementation, although now with the new software packages, should be pursued aggressively to completion.

4.4 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.

4.4.1 Original Recommendation

Reporting and Performance Measurement

As previously noted each of the Transportation Agents and especially the Consortium management team exhibits a high level of proficiency with the routing software and are able to extract any necessary data required to support the analysis of data. It is recommended that the Transportation Department further leverage this expertise to establish a systematic approach to performance measurement. Establishment of a proactive reporting schedule that includes reports such as:

A daily student change log for each Agent; a weekly route change report for each Agent;

A quarterly performance operations report for the Transportation Manager that provides summary statistics and detailed data on issues such as capacity utilization, route pairing, average run times, and lateness; and

An annual operational summary to the Partner Boards that summarizes key performance statistics such as the direct and indirect cost per bus, cost per student, and cost per kilometer would greatly increase the value that is received from the routing software.

This reporting structure could then also be used to provide each of the Transportation Agents with a greater understanding of the impact of their route planning strategies and decisions.

4.4.2 Incremental Progress

Reporting and Performance Measurement

The Consortium has implemented a number of regular performance tracking mechanisms. A summary Key Performance Indicators report provides a list of twelve measures determined by management to describe the overall performance of the system. The summary is supplemented by more detailed measures that are utilized by Consortium management to provide a more nuanced understanding of performance. This effort is also supported by the Bus Operator Performance Report, which includes measures of operator performance such as accidents, incidents, and complaints. Consortium management also makes regular use of the *BusPlanner* software for ad hoc data extraction and analytical purposes.

Route planners demonstrated a high level of competence with the system and their job responsibilities when placed in the context of their relatively short tenure with the Consortium. They demonstrated a clear understanding of the impact of their route planning decisions. One example that supports this observation was one planner's understanding of operator contracts and the impact of cost for each size of vehicle relative to route efficiency. The route planner analyzed the cost difference between the use of small vehicles and a conventional bus and found that it was more cost effective (in this example) to continue using two smaller vehicles in one area rather than to use a single full size bus.

4.4.3 Opportunities for Improvement

Reporting and Performance Measurement

The changeover of staff and software since the original review causes a reset in expectations regarding this recommendation. Many of the new route planners must still

develop a higher level of baseline proficiency in the use of the routing software before developing a more sophisticated analytical use of the system for improving overall system performance. Each route planner is currently at a different level of development, but management demonstrates the ability to balance responsibilities appropriately in order to maintain quality and overall system efficiency and effectiveness. The staff turnover and software change has, however, placed an inordinate burden on the Consortium's management that will have to gradually be balanced out to ensure long-term sustainability of performance, and consolidation of the efficiency gains achieved thus far.

4.5 Regular and Special Needs Transportation Planning and Routing

Original Recommendation Routing Assessment

It is recommend that a complete routing and bell time assessment be undertaken across the entire service area to analyze the potential for service delivery improvements and cost savings of one fully integrated routing system. Route planning parameters, agreed upon and supported by each of the Member Boards, would provide the basis on which runs would be designed. Support from the Member Boards must also include granting the necessary bell time changes to promote the logical paring of schools (regardless of Board) by area.

As part of this assessment, the Consortium should analyze the continued use of public transit services. The establishment of an integrated run and route network is likely to present opportunities to provide services to CEPEO students using existing school buses. The use of public transit services by CECLFCEF students may be warranted. However, consideration of changes in the existing service models should be considered only as part of a broader routing analysis built on the use of integrated runs with the goal of increasing the use of existing vehicle capacity.

4.5.1 Incremental Progress

Routing Assessment⁴

The Consortium has been very aggressive in analyzing and implementing route system changes since the completion of the original review. Examples were provided of significant improvements to overall capacity utilization across the service area, and

⁴ All data reported in this section of the report refers to data collected while the E&E team was on site. There may be inconsistencies with some previously reported Ministry data due to the different timing of the data collection.

recommendations for bell time changes resulting in cost savings without a negative impact to levels of service. Interviews indicate a high level of understanding and support on behalf of the Governance Committee for the continuous improvement of overall system-wide efficiency.

A further analysis of system effectiveness for this review was facilitated greatly by the implementation of the *BusPlanner* software and revised coding structure. The figures and tables below illustrate the results of this analysis. Overall, the analysis indicates that the Consortium has made excellent progress on improving the overall efficiency of the system. Strong gains in capacity utilization have resulted in the removal of 17 large vehicles from service. Some gains in asset utilization have also been achieved, particularly in the double-tripping of large buses. Further improvements in this regard, while worth studying, will require much greater coordination of school bell times. This may have unacceptable implications on service effectiveness. A heavy reliance is still placed on the use of small vehicles, but cost strategies have pointed to this as a viable routing strategy going forward.

Figure 1 illustrates that overall system-wide capacity utilization on a planned (weighted student) basis is 77%. This is well within industry guidelines and represents a large improvement over the original review.

Figure 1: Planned Capacity Utilization

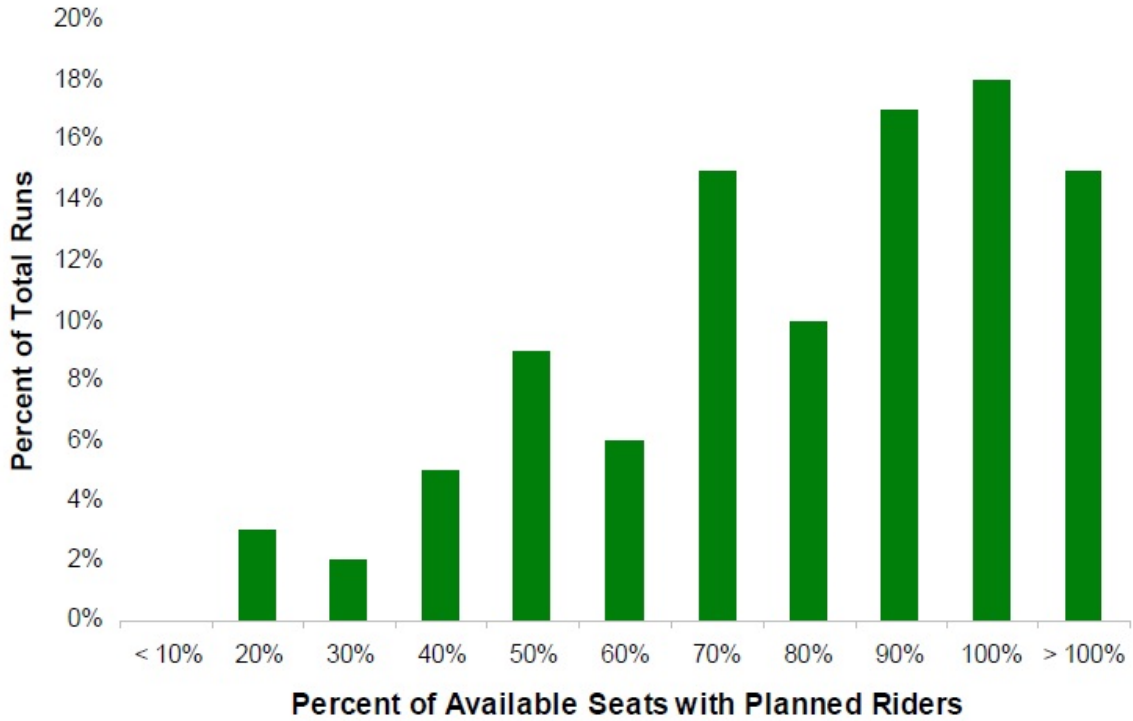


Figure 2 illustrates that approximately 30% of all vehicles are double-tripped, while 66% still only complete one morning and one afternoon run. However, as illustrated in

Figure 2: Daily Runs per Vehicle

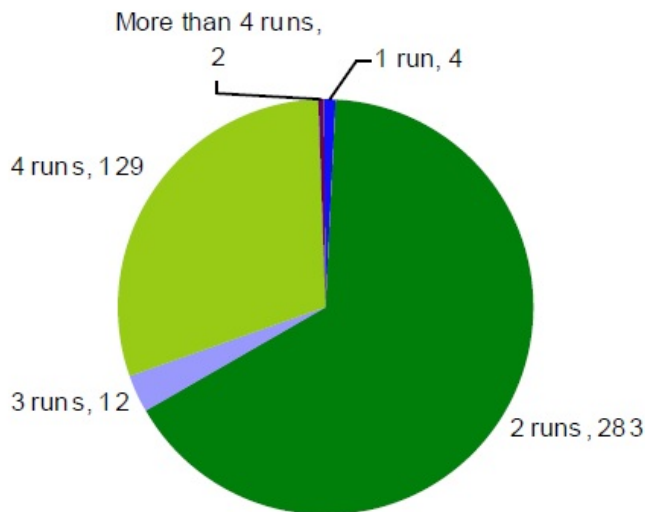


Table 3, the double-tripping is heavily weighted toward large (72 passenger) buses where 67% of all vehicles complete four or more daily runs. Contractual strategies pay for small vehicles in a manner that keeps single runs for these mainly special education vehicles a viable and cost effective approach.

Table 3: Cross Tabulation of Daily Runs by Vehicle Capacity

Vehicle Capacity	1	2	3	4	5	6	Count of Routes
1		100%					2
6	2%	98%					157
7		100%					9
13		100%					1
15		80%	20%				10
18		87%	3%	10%			62%
72	1%	29%	4%	65%	1%	1%	189%

Route planning strategies focus primarily on maximizing the use of available capacity on each bus run, and then reusing the bus for additional runs wherever feasible. The system also makes limited use of two additional strategies in pursuit of these goals: combination runs where more than one school is serviced on a single run; and (even more limited) transfers whereby some students ride more than one bus either to or from school. Table 4 illustrates that 14% of all bus runs service more than one school. Table 5 illustrates that a very small proportion of all students are assigned to transfer runs. The use of multiple routing strategies and techniques provides a strong indication that staff is aggressive and thoughtful in pursuing the most effective routing solutions throughout the system.

Table 4: Schools Served by Run

Count of Schools Served	Count of Runs	Percent of Total
1	973	86%
2	138	12%
3	22	2%

Table 5: Count of Transfer Students

Students	Morning	Afternoon
Count of Total Riders	16,614	16,327
Count of Transfers	52	50
Percent of Transfers	0.3%	0.3%

Service effectiveness throughout the system appears to be high. Student ride times in particular are excellent, and well below the standards established by policy. Figure 3 and Figure 4 illustrate student ride times, as reported by the *BusPlanner* software, for both morning and afternoon transportation.

Figure 3: Morning Ride Time Summary

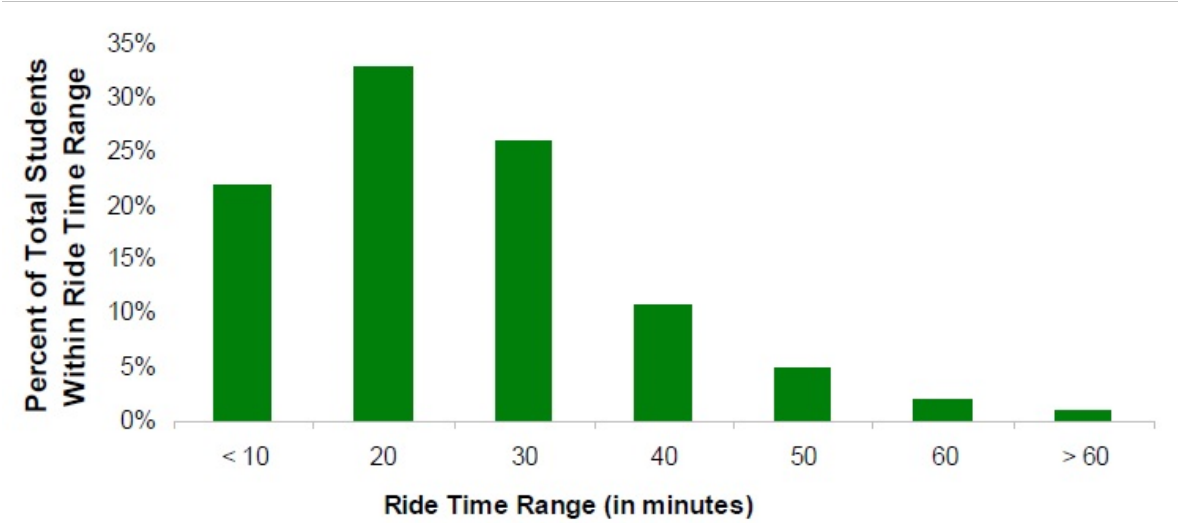
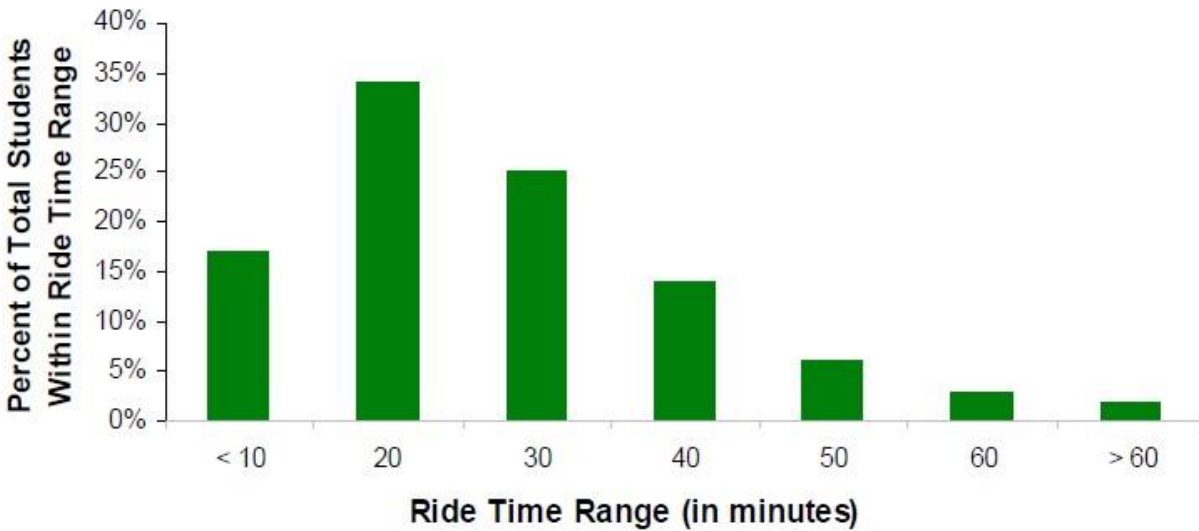
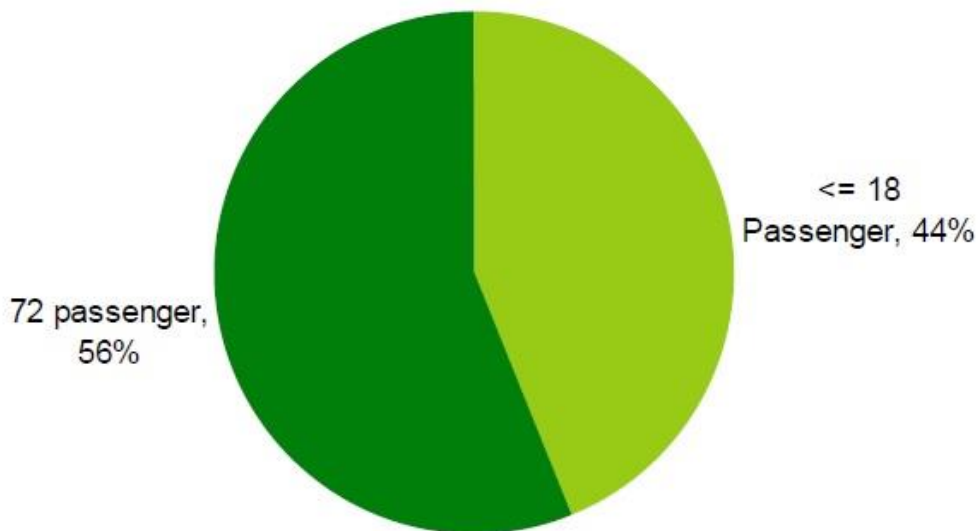


Figure 4: Afternoon Ride Time Summary



A heavy reliance is still placed on the use of small vehicles throughout the system. Figure 5 illustrates the number of runs completed by vehicle capacity. However, for reasons discussed earlier, this has proven to be an efficient and effective routing strategy for the Consortium.

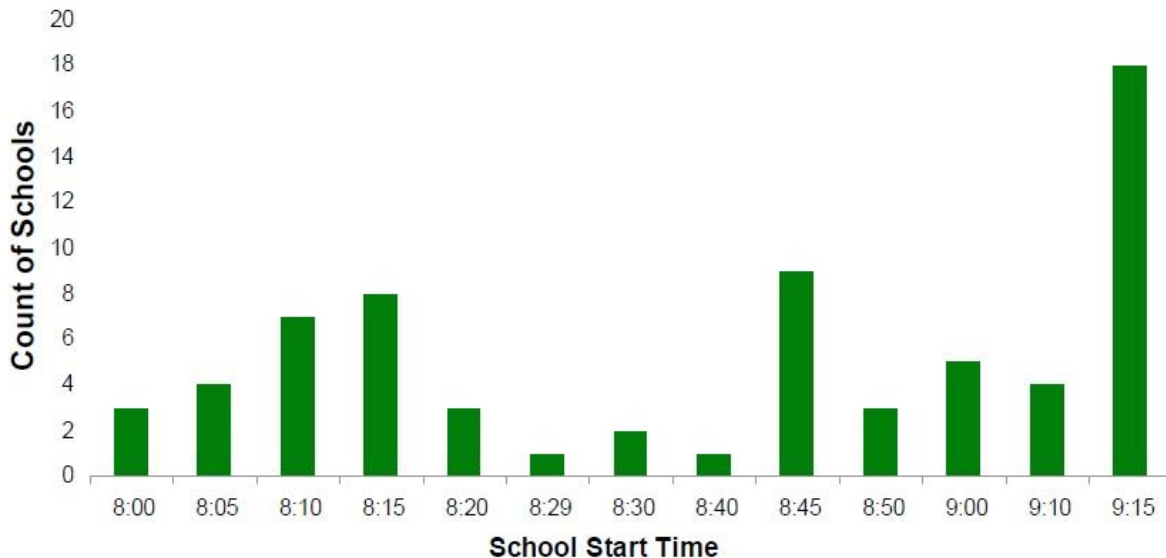
Figure 5: Use of vehicle types by available capacity



Further double-tripping of buses beyond the level already achieved will require a more comprehensive alignment of school bell times throughout the system. Figure 7

illustrates the current distribution of morning school bell times. Separating schools into more coordinated time tiers as opposed to the current distribution might result in a further ability to utilize buses more over the course of the day and is worthy of further exploration.

Figure 6: School Start Time Summary



4.5.2 Accomplishments

Routing Assessment

The Consortium commissioned a comprehensive analysis of the potential for run integration, walk zone changes and the use of transit services in response to this recommendation. Many of the indicated improvements were implemented even before this study was completed. The study found that while limited opportunities for run integration of Member Board students exist, there were further opportunities for the integration at the route level. This is consistent with current route planning strategies. The study also found that transitioning away from transit use would be prohibitively expensive, unless significant route combinations were achieved through the coordination of school bell times. The ongoing efforts of the Consortium to enhance system efficiency and effectiveness meet the intent of the original recommendation.

4.6 Results of the Follow-up E&E Review

CTSO has been rated a **High** for the Follow-up Review. Extraordinary effort has expended in improving the overall efficiency and effectiveness of the routing system. Significant improvement was accomplished while also switching software systems and

integrating several new staff members. While there are still areas for improvement related to the recent staff and system changes, the Consortium is committed to completing these changes and utilizing the enhanced systems to continually improve performance in the future. As such they fully satisfy the intent and expectations of the E&E process, and serve as a model to be emulated by other transportation consortia throughout the Province.

5 Contracts

5.1 Introduction

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

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

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

Contracts – Original E & E Rating: Low

Contracts – New E & E Rating: High

5.2 Contract Structure

An effective contract⁵ 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.

⁵ The word Contract in this context refers to detailed documents outlining the scope of services, rates and expected service levels. The phrases Purchase of Service agreement, statement of understanding, or memorandum of 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.

5.2.1 Original recommendations

Use of Contracts

A contract that clearly articulates the expectations and obligations of each party is a fundamental requirement for an effective business relationship. The lack of current and complete contract documentation for bus operators reduces the extent to which the School Boards and Consortium can ensure and enforce accountability related to the provision of student transportation. The Consortium should make every effort to ensure that contracts with Bus Operators are signed prior to the start of the school year. Signed contracts ensure that Operators are bound to the agreed upon service levels. It is important, through the use of proper contracts, that accountability related to student transportation is properly shared between the School Boards, Consortium, and Operators.

Snow Day Compensation for Operators

We acknowledge that driver attrition is a problem that affects all school bus operators and in turn Consortia across the province. Further, we acknowledge that there are costs which are incurred in terms of ensuring the fleet of buses and drivers are ready to resume duty when the inclement weather passes by. However, these costs are fully captured within the fixed and driver wage components of the contract.

It is important that we make this distinction because variable costs, those which are specifically derived from distance travelled, are not incurred by the operators and operators are not out of pocket for these expenses; as such, payment of these variable amounts on inclement weather days should not continue. Driver attrition should remain unchanged if drivers' wages continue to be paid on snow days and likewise proper fleet maintenance should continue given the continuation of the fixed component of remuneration.

Additionally, the current provision for inclement weather should be reviewed. While incorporating some protection for Operators is reasonable, particularly in capital intensive business like school bus operations, it is unreasonable to expect payment for variable expenses on days when services are not rendered. Therefore, consideration should be given to eliminating the variable component of the rate when services are cancelled due to inclement weather.

5.2.2 Incremental progress

Bus operator contract clauses

The Consortium has executed contracts with all of its bus operators based on the Ministry's bus operator contracting template. Discussions with Consortium management

indicated that the Consortium's legal advisors did not review this contract prior to its execution.

The current contract was executed in July 2009 and is valid for three school years. It includes a clause that extends the contract for an additional one or two years at the sole discretion of the Consortium. Noteworthy clauses in the contract outline, among other things:

- Training requirements for drivers: The Consortium mandates that operators provide an outline of their training programs. These training programs are required to include a number of topics, including First Aid/CPR and EpiPen training. The cost of providing this training is compensated by the Consortium;
- Details related to driver, vehicle and operator performance, communication, and operational expectations including the implementation of trial runs prior to the start of the school year;
- Compliance requirements with respect to the contract, Consortium policies, and provincial and federal regulations;
- Vehicle age requirements. The contract mandates a maximum vehicle age (12 years for 72 passenger and seven years for small vehicles);
- Fee structures and payment schedules, including information on adjustments due to inclement weather, labour disputes and fuel costs; and
- Other terms related to insurance coverage requirements, dispute resolution, termination and confidentiality.

The Consortium reserves the right to re-allocate routes among operators. Discussions with Consortium management indicated that mid-year route reallocations are determined by the Director and are made primarily based on operator performance. However, no documentation is retained by the Consortium that outlines the rationale underlying these decisions.

Bus operator compensation

The compensation formula identified in the bus operator contract is the sum of a fixed daily base rate, which varies according to the type of vehicle being utilized, and a per kilometre rate which varies according to the vehicle being utilized and distance travelled. Adjustments for inclement weather, fuel escalation and a fixed rate for routes

over three hours are also included. Compensation for inclement weather days is set as a percentage of the daily base rate.

Small vehicle contract

The Consortium concluded a competitive procurement process for small vehicle operators in June 2010. Noteworthy clauses included in the contract that was used as part of this process include:

- Training requirements for drivers: The Consortium mandates that operators provide an outline of their training programs. These training programs are required to include a number of topics, including First Aid/CPR and EpiPen training. The cost of providing this training is compensated by the Consortium;
- Details related to driver, vehicle and operator performance, communication, and operational expectations including the implementation of trial runs prior to the start of the school year;
- Compliance requirements with respect to the contract, Consortium policies, and provincial and federal regulations;
- Vehicle age requirements;
- Fee structures and payment schedules, including information on adjustments due to inclement weather, labour disputes and fuel costs; and
- Other terms related to insurance coverage requirements, dispute resolution, termination and confidentiality.

Small vehicle operators are compensated using a fixed per kilometre fee with an additional minimum daily payment.

Transit passes

The Consortium currently provides transit passes to a number of its students. These transit passes are purchased from the relevant municipal body at no discount. Contracts have not been executed with the municipal body despite the repeated efforts of Consortium management.

5.2.3 Accomplishments

It is recognized that the Consortium now demonstrates the following best practices in addition to the best practices outlined in the original report:

Operator contract clauses

The Consortium has contracts in place with operators which detail appropriate legal, safety and other non-monetary terms. This ensures the contractual relationships between operators and the Consortium are defined and enforceable. Contract wording automatically extends the contract into the next year based on the terms and conditions from the previous year, helping to ensure that a contract is in place at the start of the school year.

5.2.4 Opportunities for improvement

Retain documentation outlining the rationale for route allocations and re-allocations

While it is recognized that the Consortium uses an effective methodology to allocate and re-allocate routes among operators, discussions with Consortium management indicated that no documentation is retained regarding these decisions. In order to limit liability to the Consortium until the implementation of competitive procurement processes for operator services, it is recommended that Consortium management retain documentation outlining the rationale underlying decisions to allocate and re-allocate routes.

Undertake a legal review of all contracts

In order to bolster its risk management and mitigation efforts, it is suggested that the Consortium undertake a legal review of all of its contracts prior to their execution, particularly in cases where contract templates are used.

5.3 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.

5.3.1 Original recommendations

Competitive Procurement Process

Contracts for transportation services are currently not competitively awarded. By not engaging in a competitive process, the Consortium will not know whether it is paying best rates for services provided. If a competitive process is used to procure contracted services, the Consortium can clearly state all service requirements in the procurement document. In addition, Consortium can be sure that it will obtain the best value for its money as Operators will compete to provide the required service levels at prices that

ensure they earn an appropriate return on investment. This may not mean that rates will decline; however, the concern for the Consortium should be to obtain value for money expended for service provided. A competitive procurement process may not be appropriate for all areas or routes under service depending on the available supply of service providers.

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

In areas where this process may not be appropriate, such as remote areas where there may not be many operators interested in providing the service to a particularly remote area, the current negotiation process may serve the needs of both the Operator and the Consortium. The Consortium, however, can use the competitively procured contracts as a proxy for service levels and costs negotiated with the more rural Operators.

Within the competitive process, the Consortium should also require that all contracts with Operators be signed and held with the Consortium prior to the beginning of the school year. This will ensure that all contractual terms are agreed upon in advance and that responsibility and accountability for the various elements of providing student transportation are documented and agreed upon.

Identification of proper parties to the Operator Contracts

The school bus association has no legal standing; therefore the association is not a legal entity and should not be named in a contract as they were in the 2006/2007 contract. The individual School Boards and the individual school bus operators are the only established legal entities that can possibly enter into a legally binding contract for the provision of bus services to the students who attend CEPEO and CECLFCE schools. It is understood from discussions with the Consortium that they are aware of this requirement from the Capacity Building exercises conducted over the summer and will ensure that the proper legal entities are named in the 2007/2008 contract when it is finalized.

5.3.2 Incremental progress

Operator services procurement

The Consortium recently completed a competitive process for the procurement of small vehicle operators. Consortium management and members of the Governance Committee noted that the use of a competitive procurement process resulted in a reduction in the cost of providing these services. These discussions also indicated that the Consortium tentatively intends to proceed with the competitive procurement of bus operator contracts in May 2012. This goal is also identified in the Consortium's long term planning document.

Bus operator contracts are currently procured through a negotiated process. These contracts are in effect for three years with annual negotiations taking place on the driver wage and base rate component of the contract. The Consortium negotiates its bus contracts through combined operator meetings, although some operators delegate their negotiation responsibilities to other operators. The Consortium anticipates that its next bus operator contract will be procured through a competitive process.

The Consortium has a procurement calendar that mandates the key dates and milestones over which the Consortium is to procure operator services on an annual basis. This calendar is included as part of its internal procedures manual.

5.3.3 Accomplishments

It is recognized that the Consortium now demonstrates the following best practices in addition to the best practices outlined in the original report:

Competitive procurement

The Consortium has implemented a competitive process for the procurement of small vehicle operator services and intends to initiate a similar process for bus operators. Competitive procurement processes are recognized as the best means to ensure market rate pricing as they allow the purchaser to obtain the best value for money given a defined set of service expectations. The use of a competitive procurement process introduces the business opportunity to a competitive market. Based on the operators submissions, the Consortium is able to identify the most qualified transportation service operators that offer the best prices for the level of services provided. This is a notable achievement as it is a fundamental step in ensuring that bus operator services are contracted at competitive market rates.

5.4 Contract Management

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

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

5.4.1 Original recommendations

Conduct ongoing monitoring of operator performance

It is recommended that the Consortium establish a rigorous program of contract monitoring and enforcement. The key elements to this plan should be:

- *Operators should be required to demonstrate that they have provided their Drivers appropriate safety and first aid training prior to the start of the school year. Operators can provide copies of certifications or proof of training for each Driver to the Consortium with regular updates as additional training is received;*

- *Consortium staff should take a proactive approach and perform random audits to ensure:*
- *Routes are being followed appropriately;*
- *Buses being operated meet safety requirements as stated in contracts; and*
- *Only assigned students utilize bus services.*
- *Records of these random audits and monitoring activities should be maintained by the Consortium as evidence that monitoring does occur.*

5.4.2 Incremental progress

A governance approved policy outlining the Consortium's primary function includes references to the monitoring and inspection of operators. This policy lays the basis for the Consortium's operator administrative, safety, service and performance monitoring activities.

Bus operator administrative and contract compliance, facility and maintenance monitoring

The Consortium has assigned responsibility for contract management to a single staff member who is responsible for conducting all administrative and contract compliance, facility and maintenance monitoring functions. Discussions with Consortium management indicate that the Consortium aims to audit approximately 10% of its operators/fleet on an annual basis.

Operator safety and service, performance monitoring

Route audits are conducted by the same staff member responsible for ensuring bus operator contract compliance and facility and maintenance monitoring. These are done through a combination of on-the-bus audits, bus following, and online using the Consortium's GPS system. Discussions with Consortium management indicated that the Consortium conducts route audits on approximately 10% of all of its routes. Criteria against which operator performance is judged include safety, operational performance, communication, document control and training.

Route audits are executed on both a random and planned basis. Discussions with Consortium management indicated that planned route audits are primarily on-the-bus audits that require parents to be informed and driver consent, whereas random audits are usually either in response to a complaint or done through following buses on the road.

Ongoing operator performance monitoring is also the responsibility of this staff member.

5.4.3 Accomplishments

It is recognized that the Consortium now demonstrates the following best practices in addition to the best practices outlined in the original report:

Contract management

The Consortium ensures that the information, facility and vehicle requirements outlined in the operator contracts are verified in a timely manner and tracks the performance of operators over time. In addition, the Consortium also performs periodic audits of operators to ensure that on-road service quality matches the expectations set out in the operator contract. Such efforts to ensure operator compliance help the Consortium to measure whether the operators are complying with stated contract clauses and, ultimately, if they are providing safe and reliable service

5.5 Results of E&E follow-up review

The process by which the Consortium procures, structures, and manages its contracts for transportation services has been assessed as **High**. Positive elements include the execution of thorough operator contracts; the initiation of a competitive procurement process with operators; and highly effective contract management processes. In particular, the assignment of contract management processes to a dedicated staff is an especially effective practice for this Consortium. It is recommended, however, that the Consortium retain documentation outlining the rationale for route allocations and re-allocations among operators and undertake a legal review of its contracts in order to add additional measures of risk management and mitigation.

6 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. 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 Boards ⁶	Effect on surplus Boards ⁶
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:

⁶This refers to Boards that have a deficit/surplus on student transportation

Conseil Scolaire de District Catholique du Centre-Est de l'Ontario

Item	2008-09
2008-09 Transportation Surplus (Deficit)	(1008677)
% of Surplus (Deficit) attributed to the Consortium (rounded)	0.95
Revised amount to be assessed under the Consortium	(953603)
E&E Rating	High
Funding Adjustment based on Ministry's Funding Adjustment Formula	100%
Total Funding adjustment	953603

Conseil des Ecoles Publiques de l'Est de l'Ontario

Item	2008-09
2008-09 Transportation Surplus (Deficit)	(1957811)
% of Surplus (Deficit) attributed to the Consortium (rounded)	0.59
Revised amount to be assessed under the Consortium	(1161374)
E&E Rating	High
Funding Adjustment based on Ministry's Funding Adjustment Formula	100%
Total Funding adjustment	1161374

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

7 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
CECCE or CECLFCE	le Conseil Scolaire de District Catholique du Centre-Est de l'Ontario, previously named le Conseil des écoles catholique de langue française du Centre-Est
CEPEO	le Conseil des Ecoles Publiques de l'Est de l'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 CTSO	Consortium de transport scolaire d'Ottawa
Deloitte	Deloitte & Touche LLP (Canada)
Driver	Refers to bus Drivers, see also operators
Director	Director of the CTSO
E&E	Effectiveness and Efficiency
E&E Review Team	As defined in Section 1.3.1
E&E Reviews	As defined in Section 1.3
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

Terms	Definitions
Evaluation Framework	The document, titled “Evaluation Framework for the Consortium de transport scolaire d’Ottawa” 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
HR	Human Resources
IT	Information Technology
JK/SK	Junior Kindergarten/Senior Kindergarten
KPI	Key Performance Indicators
Management Consultants	As defined in Section 1.2
Ministry	The Ministry of Education of Ontario
MPS	Management Partnership Services Inc., the routing consultant, as defined in Section 1.2 and 1.3
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 1.3 of the Evaluation Framework
Partner Boards, Member Boards or Boards	The school boards that have participated as full partners or members in the Consortium
Rating	The E&E Assessment score on a scale of High to Low, see Section 1.3
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

8 Appendix 2: Financial Review – by School Board

Conseil Scolaire de District Catholique du Centre-Est de l'Ontario

Item	2005/2006	2006/2007	2007/2008	2008/2009	2009/2010 ⁷
Allocation ⁸	\$9,641,948	\$11,391,265	\$11,983,289	\$12,905,697	\$13,106,395
Expenditure ⁹	\$10,992,770	\$12,401,180	\$13,185,575	\$13,914,374	\$14,420,773
Transportation Surplus (Deficit)	(\$1350822)	(\$1009915)	(\$1202286)	(\$1008677)	(\$1314378)
Total Expenditures paid to the Consortium	\$10,542,670	\$11,801,282	\$12,570,416	\$13,154,649	\$13,747,987
As % of total Expenditures of Board	95.91%	95.16%	95.33%	94.54%	95.33%

Conseil des Ecoles Publiques de l'Est de l'Ontario

Item	2005/2006	2006/2007	2007/2008	2008/2009	2009/2010
Allocation ⁴	\$6,347,950	\$6,484,120	\$7,448,351	\$8,135,914	\$8,295,916
Expenditure ⁵	\$10,353,031	\$9,605,307	\$9,349,593	\$10,093,725	\$10,043,396
Transportation Surplus (Deficit)	(\$4,005,081)	(\$3,121,187)	(\$1,901,242)	(\$1,957,811)	(\$1,747,480)
Total Expenditures paid to the Consortium	\$4,983,195	\$5,852,514	\$5,696,736	\$5,987,598	\$6,091,320
As % of total Expenditures of Board	48.13%	60.93%	60.93%	59.32%	60.65%

⁷ 2009-2010 allocations and expenditures based on Ministry data – Revised Estimates for 2009-2010

⁸ Allocation based on Ministry data – includes all grant allocations for transportation (Section 9 00008C, Section 13 00006C, Section 13 00012C)

⁹ Expenditure based on Ministry data – taken from Data Form D: 730C (Adjusted expenditures for compliance) – 212C (Other Revenues) + 798C (Capital expenditures funded from operating)

9 Appendix 3: Document List

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2. aa10.pdf
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