

*A Guide for School Boards and Transportation Consortia:*

# Student Transportation Phase One Opportunities for Contract and Procurement Standardization

Student Transportation Competitive Procurement Review  
Report on Phase One Opportunities

Submitted July 13, 2016

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## BACKGROUND

Competitive procurement for student transportation services within the province of Ontario has, by in large, been implemented over the past 7 years. As the sector engaged in this new practice, changes in the industry are evident to school boards, transportation officials and the vendor community.

The Student Transportation Competitive Procurement Review Report (STCPR), authored by the review team consisting of The Hon, Colin L. Campbell (Chair), Paul Emanuelli and Leo Gottlieb was released in February of 2016. The report identified a number of opportunities for standardization which could be explored by school boards and transportation consortia in an effort to make procurement documents concisely written and easier for proponents to respond. Identified areas for improvement to the processes are expected to yield positive benefits to the sector at large.

This document is not intended to serve as a template, but rather provide a menu of considerations as school boards/consortia plan their contract and procurement process for student transportation services. Each school board/consortium has established procurement policies and procedures which comply with the *Broader Public Sector* (BPS) Procurement Directive. Further, each school board/consortium have established policies and procedures for the provision of student transportation services. Although there are many similarities in the province, there are sites that may have unique requirements or considerations based on geographical or situational conditions.

Further, each school board(s)/consortia may select different types of procurement processes to meet their desired service objectives. It is expected that each local school board/consortium will select and modify the contents of this report to best support their service objectives while considering the local market conditions and supplier availability.

This document has been assembled with input from the province's 33 transportation consortia, the OASBO Supply Chain, Council of Senior Business Officials (COSBO), industry representatives, and in consultation with the Student Transportation Procurement Advisory Committee (STPAC). This document addresses 17 opportunities identified in the Student Transportation Competitive Procurement Review Report, representing a total of 60% of the report's overall number of identified opportunities for standardization.

## List of Phase One Opportunities

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### Phase 1 Opportunities for Standardization

#	Opportunity
3	Eliminate average fleet age requirements and consider setting standards for maximum allowable vehicle age
4	Establish standardized requirements in terms of service, performance and capacity
5	Do not include operator cost structure as part of the evaluation
8	Permit the sale of businesses and transfer of contracts
9	Align contract lengths to more closely reflect the allowable ages for the asset categories
11	Fully compensate costs incurred to make assets available
12	Provide cost of living adjustments based on recognized inflation benchmarks
16	Establish operator qualifications that are common to consortia at the provincial level
17	Standardize requirements, service levels and the format for route descriptions and rate adjustments across consortia as much as possible
18	Limit information sessions requiring a physical presence
19	Limit information that is collected to that which will be evaluated according to disclosed criteria
20	Maintain clear distinctions between mandatory requirements, rated criteria, contract obligations, evidence and evaluations
21	Maintain clear distinctions between different categories of mandatory requirements
22	Disclose contract obligations clearly and transparently, and in the appropriate place
23	Articulate clear evaluation criteria directly linked to ability to perform the required service
24	Seek quantitative and objective evidence whenever possible
25	Where qualitative evidence is necessary, use a checklist method of evaluation

## How To Use This Guide

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Each Opportunity is addressed in the following manner:

**Opportunity # X** (as set out in the Student Transportation Competitive Procurement Review Report) **Description of Opportunity**

**Opportunity for Standardization:** Includes background information relating to the Opportunity.

**Related Contract Terms:** Includes sample language that can be embedded in a contract.

**Related Procurement Planning:** Includes sample language that can be embedded in a procurement document.

**Considerations:** Includes information for discussion and awareness when developing documents.

**Requirements for Legal Review or Board Policy Approval:** Each school board/consortia will seek additional advice as required. The table is designed to assign a likelihood of whether the Opportunity will require additional legal support or whether or not school board policy changes may be required.

**Likelihood of Standardization and Simplification:** The table is designed to assign the likelihood of whether the opportunity can be standardized amongst school boards/consortia and whether it can be simplified.

RED	Items marked Red will require additional exploration by each school/board consortia and may require support from other subject matter experts.
YELLOW	Items marked Yellow may require additional exploration based on school/board consortia specific circumstances.
GREEN	Items marked Green are likely easily adopted by the majority of school/board consortia.

**The decision to adopt any standardization considerations is a school board decision. For school boards that choose to apply the standardization detailed below, they may apply it as described or choose to apply it with modification(s).**



## Glossary of Terms

The glossary of terms is designed to provide school boards and consortia definitions for contact terms. Where possible, the definitions align with those established and used in the annual Ministry Transportation survey.

Term	Definition
<b>Run</b>	A run is defined as the actual kilometres and/or time that a vehicle is operating with students on board.
<b>Route</b>	A route is defined as the total number of runs serviced by a vehicle, the slack/link/via kilometres and/or time between run A and run B and the deadhead using the shortest kilometres and/or time from the last stop on run B back to first stop on run A for each AM and PM component.
<b>Deadhead</b>	<p><u>Morning Deadhead:</u></p> <p>A measurement in kilometers from the last school drop off site back to the first pick up bus stop location in the morning, as calculated by the consortium’s transportation software using the most direct distance on the road network.</p> <p><u>Afternoon Deadhead:</u></p> <p>A measurement in kilometers from the last bus stop drop off back to the first school pick up location in the afternoon, as calculated by the consortium’s transportation software using the most direct distance on the road network.</p> <p><u>Total Route Deadhead:</u></p> <p>The sum of the morning and afternoon deadhead kilometers.</p> <p><b>Note:</b></p> <p>In some contracts, kilometers may be either replaced or augmented by a time calculation.</p>

<b>Link / Slack/Via</b>	The kilometres that are neither deadhead nor run/load (i.e. kilometres between two runs or two schools)
<b>Base Rate</b>	The Base Rate for each vehicle is the rate to make the vehicle available for one day.
<b>Variable Rate</b>	A rate to compensate the Operator for costs in excess of the Base Rate.
<b>Total Daily Rate</b>	The sum of the Base Rate plus the Variable Rate per day, per route, by class of equipment.
<b>Trial Runs</b>	Runs Operators would have physically driven to ensure familiarity and accuracy of stops and times without students on board the bus.
<b>Total Number of Paid Service Days</b>	The number of days the vehicle is operating.
<b>Wait Time</b>	Paid time to an Operator when a driver is required to be on standby or wait to pick-up or drop-off students. (i.e. school lockdown)
<b>Modified Day Service</b>	A run that has pick-up and/or drop-off times outside the normal school day.
<b>Return to School Fee</b>	A rate to compensate the Operator for the extra time and/or mileage of a route when a student is returned to school.
<b>Contract Performance Management Program</b>	Each consortium will establish a Contract Performance Management Program to specify the expected standards of performance including related key performance indicators.

### Opportunity 3: Eliminate average fleet age requirements and consider setting standards for maximum allowable vehicle age

The decision to adopt any standardization considerations is a school board decision. For school boards that choose to apply the standardization detailed below, they may apply it as described or choose to apply it with modification(s).

#### *Opportunity for Standardization*

The maximum age standards for consideration are set out in the table below and are consistent with previous sector communications.

<b>Vehicle Capacity (Ministry)</b>	<b>Description</b>	<b>Recommended Maximum Age</b>
Full Size, Full Size Adaptable	Weighted Seating Capacity 48+ i.e. Type C, Type D	12 years
Mid-Size, Mid-Size Adaptable	Weighted Seating Capacity 30 to 48 i.e. Type B, Type C	12 years
Mini-Size, Mini-Size Adaptable	Weighted Seating Capacity Up to 30 i.e. Type A, MFSAB	10 years
Van	i.e. Chevy Express 2500, GMC Savana 2500 - Seating Up to 7 Passengers	8 years
Van - Accessible (Adaptable)	PDPV, carries both w/c and ambulatory	8 years
Mini-Van	i.e. Dodge Caravan or similar Mini-Van Seating Up to 5 Passengers	8 years
Sedan	i.e. Car, seating Up to 3 Passengers	8 years

There is value for school boards/consortia to require an average age of fleet in the first year of a contract to ensure a balanced fleet as a minimum offering at the onset of the contract. The continuance of a mandatory average age of vehicle for the duration of the

contract may be eliminated with a robust contract compliance and performance management program.

## **Related Contract Terms**

Vehicles used in the provision of all home to school transportation services, including spare vehicles, shall conform to the following maximum age specifications. In addition, as of August 1<sup>st</sup>, the average age specification shall conform for the first year of the contract, and then the average age specification becomes a guideline for performance monitoring in the remaining contract years.

- a. Full-Size and Full-Size Adapt vehicles with a weighted passenger seating capacity of more than 48 will have a maximum age of 12 years
- b. Mid-Size and Mid-Size Adapt vehicles with a weighted passenger seating capacity of 30 to 48 (Up to 48) will have a maximum age of 12 years
- c. Mini- Size and Mini-Size Adapt vehicles with weighted passenger seating capacity of 16 to 30 will have a maximum age of 10 years
- d. Van and Van - Adapt vehicles with passenger seating capacity of up to 7 will have a maximum age of 8 years
- e. Mini-vans with passenger seating capacity of up to 5 will have a maximum age of 8 years.
- f. Sedans with passenger seating capacity of up to 3 will have a maximum age of 8 years. Vehicle age will be based on the date contained in the vehicle warranty card (in-service), which represents the date on which warranty coverage applies for each vehicle.

Vehicles used in the provision of transportation services shall conform to the maximum age specifications as at August 1<sup>st</sup> and each day throughout the year. The Consortium may allow for the use of older vehicles that otherwise comply with the requirements of this Agreement upon receipt of written notification from the Operator of vehicles and written approval from the Consortium. If authorized, this will be on a temporary basis based on circumstance.

The Operator shall file with the Consortium's transportation office a rolling stock report stating the make, model, vehicle license, fleet unit number, seating capacity and year of the vehicle servicing the route, prior to (insert preferred date here: i.e. October 31<sup>st</sup>) annually in a standardized electronic reporting format provided by the Consortium.

Each vehicle used to service this contract must meet the Ministry of Transportation Inspection Standards and will be, in its interior, neat, clean, dry and in good repair; and on its exterior, clean and in good repair, free from exterior body damage and have a well-maintained paint finish.

## Related Procurement Document

The maximum age of fleet, and the average age of fleet for Year 1 of the contract, identified in the contract should be a binary compliance request in the procurement evaluation. For example, based on the terms included in the contract:

Service Delivery Requirements	YES	NO
Are you able to meet the maximum vehicle age for each vehicle type, and the average age or lower of vehicle in Contract Year 1, as outlined above?	<input type="checkbox"/>	<input type="checkbox"/>

## Considerations

- Consortia should consider geography, length of routes and cost factors for their site that may impact their preferred maximum age.
- School boards/consortia should consider contract language that will support desired service levels with respect to the cosmetic appearance of the bus and allowing age of the vehicles to advance if contract extensions are used.
- School boards and consortia perform contract compliance and performance management programs to ensure the prescribed maximum age of assets allowed in contract meet the performance standards.
- School boards/consortia acknowledge that the Ministry of Transportation is responsible for the inspection processes; however, consideration should be given to the Auditor General’s report in this context for contract compliance and performance management.
- It is reasonable to expect that the maximum age of vehicle by type determined by each school board/consortium will correspond to the Operator’s vehicle strategy and vehicle maintenance plan. In addition, new technologies may warrant consideration to extending maximum vehicle age.
- It is noteworthy to mention completely eliminating the average age of fleet is a cause for concern for school boards/consortia in that their geography will be served by a predominately older fleet.
- Requirements for Legal Review or Board Policy Approval

In considering this opportunity for standardization, school boards/consortia shall seek (1) additional legal advice (albeit all contract language in the contract should be vetted through procurement and legal counsel); (2) if the opportunity is within approved school board policies or if it would require policy review and change approval.

Requirement	Must	Desirable	Unnecessary
Legal			GREEN
Board policy			GREEN

### Likelihood of Standardization and Simplification

This is the likelihood to standardize and simplify the opportunity in procurement documents.

Likelihood	High	Medium	Low
Standardization		YELLOW	
Simplification	GREEN		

## **Opportunity 4: Establish standardized requirements in terms of service, performance and capacity**

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**The decision to adopt any standardization considerations is a school board decision. For school boards that choose to apply the standardization detailed below, they may apply it as described or choose to apply it with modification(s).**

### ***Opportunity for Standardization***

School boards/consortia need to establish their service level expectations and define these expectations clearly in the contract.

It is the responsibility of the proponents to a procurement process to determine how they will meet the defined service level expectations.

It is the responsibility of the school boards/consortia to perform contract compliance and performance management, including a process to address matters of non-compliance. These must be clearly identified within the contract.

### **Related Contract Terms**

School boards/consortia need to examine service level expectations defined in local contracts including, but not limited to:

- Definition of delay notification thresholds and notifications (i.e. how many minutes delay equals late, and communication to consortium portal);
- Response time expectations in the event of a vehicle break-down (i.e. urban area 15 minute response time; rural area 45 minutes response time);
- Response time expectations in the event of an accident to have a manager (or designate) on site if injuries are reported (i.e. urban area 15 minute response time; rural area 45 minutes response time);
- The performance of the Agreement shall be affected in accordance with the terms of this Agreement and specifically, the Operator shall provide services which shall, at a minimum, meet the standards that are included in the Contract Performance Management program in Schedule (XX). This list is not exhaustive and may be amended from time to time at the sole discretion of the Consortium.

## Related Procurement Planning

School boards/consortia should restrict having prescribed requirements in the procurement process for evaluation that are considered within the responsibility of the proponents to determine how to serve the defined service level expectations.

For example, the requirement for an Operator to have a physical depot within the geographic service area of the school board/consortia may be too prescribed and unnecessarily restrictive. School boards/consortia should evaluate specifically how a proponent will meet the service level expectations defined in the contract which may still include a requirement for a physical depot within the region for rural Boards/Consortia.

## Considerations

- School boards/consortia need to clearly disclose the incentives for performance that exceeds defined expectations, or penalties for non-compliance to defined expectations.

## Requirements for Legal Review or Board Policy Approval

In considering this opportunity for standardization, school boards/consortia shall seek (1) additional legal advice (albeit all contract language in the contract should be vetted through procurement and legal counsel); (2) if the opportunity is within approved school board policies or if it would require policy review and change approval.

Requirement	Must	Desirable	Unnecessary
Legal			GREEN
Board policy			GREEN

## Likelihood of Standardization and Simplification

This is the likelihood to standardize and simplify the opportunity in procurement documents.

Likelihood	High	Medium	Low
Standardization	GREEN		
Simplification	GREEN		

## **Opportunity 5: Do not include Operator cost structure as part of the evaluation**

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**The decision to adopt any standardization considerations is a school board decision. For school boards that choose to apply the standardization detailed below, they may apply it as described or choose to apply it with modification(s).**

### ***Opportunity for Standardization***

School boards/consortia should identify the cost structure inputs that form the basis for financial evaluation and compensation. The individual inputs proposed should not be subject to evaluation or ranges, rather the financial evaluation should be based on the totality of the cost structure that forms the total daily rate or total contract cost.

### **Related Contract Terms**

The basis for payment should include definitions for runs, routes, base rates, variable rates, trial runs, number of days in a school year and other mechanisms that trigger compensation for defined service level expectations. See definitions provided in the Glossary of Terms.

### **Related Procurement Document**

Related to the contract definitions, inclusive of all defined contract terms and conditions, the school boards and consortia should clearly state the mechanism for financial evaluation for the total daily rate or total contract cost.

### **Considerations**

- School boards/consortia need to consider their local geography and the cost structure for compensation to Operators that yield the best value. This includes clearly defining terms included in the contract that forms the basis for payment.

## Requirements for Legal Review or Board Policy Approval

In considering this opportunity for standardization, school boards/consortia shall seek (1) additional legal advice (albeit all contract language in the contract should be vetted through procurement and legal counsel); (2) if the opportunity is within approved school board policies or if it would require policy review and change approval.

Requirement	Must	Desirable	Unnecessary
Legal			GREEN
Board policy			GREEN

## Likelihood of Standardization and Simplification

This is the likelihood to standardize and simplify the opportunity in procurement documents.

Likelihood	High	Medium	Low
Standardization	GREEN		
Simplification	GREEN		

## **Opportunity 8: Permit the sale of business and transfer of contracts**

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**The decision to adopt any standardization considerations is a school board decision. For school boards that choose to apply the standardization detailed below, they may apply it as described or choose to apply it with modification(s).**

### ***Opportunity for Standardization***

Subcontracting is a permitted practice in many existing contracts with the understanding that the subcontractor is expected to deliver to the service level expectations and that the consortium approves the subcontractor.

Factors that inform permitting the sale of a business include; local policies, the impact to route maximum award quota at the time of sale on future procurement process decisions and the requirement to consult school boards/consortia and to obtain expert legal and procurement advice. This opportunity will be considered further after broader school board/consortia, procurement and legal consultation.

### **Related Contract Terms**

At this time, there are no standard contract terms until this opportunity for standardization can be more fully formulated.

### **Considerations**

- School boards/consortia need to consider what due diligence they deem necessary prior to approving a subcontracting arrangement.
- School boards/consortia set maximum award quotas restricting the number of routes awarded to one Operator in order to ensure a robust supplier market in the local area.
- The contract and procurement process may identify different maximum route thresholds based on initial contract award, and a maximum route assignment per Operator during the contract term. If the contract permits differing maximum route assignments, for example to respond to rising enrolment, the next procurement process needs to consider the new local market conditions.

### Requirements for Legal Review or Board Policy Approval

In considering this opportunity for standardization, school boards/consortia shall seek (1) additional legal advice (albeit all contract language in the contract should be vetted through procurement and legal counsel); (2) if the opportunity is within approved school board policies or if it would require policy review and change approval.

Requirement	Must	Desirable	Unnecessary
Legal	RED		
Board policy	RED		

### Likelihood of Standardization and Simplification

This is the likelihood to standardize and simplify the opportunity in procurement documents.

Likelihood	High	Medium	Low
Standardization		YELLOW	
Simplification		YELLOW	

## **Opportunity 9: Align contracts to more closely reflect the allowable ages for the asset categories**

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**The decision to adopt any standardization considerations is a school board decision. For school boards that choose to apply the standardization detailed below, they may apply it as described or choose to apply it with modification(s).**

### ***Opportunity for Standardization***

Consultation with school boards/consortia and Operators generally revealed a level of comfort entering in to five (5) to eight (8) year fixed term contracts with optional extension years in the two (2) to the four (4) year range.

The optional extension years offered by school boards/consortia in one year increments do not bring stability to the Operator, nor to the school board/consortia. Incremental plus one optional extension years should be a mechanism only included in the event of extenuating circumstances and not as a standard contracting practice.

### **Related Contract Terms**

Successful Proponent(s) will enter an Agreement for the Route(s) which the Consortium determines will be serviced by that Proponent in accordance with the Agreement as set out in Appendix <INSERT SPECIFIC APPENDIX>.

This Agreement shall commence on the Agreement Starting Date of <INSERT DATE> and shall be for a term of <INSERT TERM WORD> (INSERT TERM NUMBER)> consecutive years, terminating on the Agreement Ending Date of <INSERT DATE> subject to extension or termination as set out below in Sections <INSERT SECTION> respectively.

The Consortium retains the option to renew this Agreement, at its sole discretion, for <INSERT TERM WORD> (INSERT TERM NUMBER)> additional contract years. The extension term is at the option of the Consortium.

The Consortium's written notice to exercise its option to extend will be given to the Operator no later than November 1st of the preceding school year in which the option is to be exercised. The Operator shall either accept or decline the extension offered by November 30th. If the extension is declined, the Agreement will terminate on the Agreement End Date and then the services will be subject to a new competitive procurement process or as specified in existing contract language.

## Considerations

- The following table outlines widely adopted maximum allowable ages of vehicles as one of the considerations when determining length of contract:

<b>Vehicle Capacity (Ministry)</b>	<b>Description</b>	<b>Recommended Maximum Age</b>
Full Size, Full Size Adaptable	Weighted Seating Capacity 48+ i.e. Type C, Type D	12 years
Mid-Size, Mid-Size Adaptable	Weighted Seating Capacity 30 to 48 i.e. Type B, Type C	12 years
Mini-Size, Mini-Size Adaptable	Weighted Seating Capacity Up to 30 i.e. Type A, MFSAB	10 years
Van	i.e. Chevy Express 2500, GMC Savana 2500 - Seating Up to 7 Passengers	8 years
Van - Accessible (Adaptable)	PDPV, carries both w/c and ambulatory	8 years
Mini-Van	i.e. Dodge Caravan or similar Mini-Van Seating Up to 5 Passengers	8 years
Sedan	i.e. Car, seating Up to 3 Passengers	8 years

- A longer term contract tends to align closer to the maximum allowable age of vehicles for obvious economic reasons for both school boards and Operators.
- School boards/consortia need to determine the appropriate length of contract to meet their service needs; including the length of the fixed term contract, the use of extension clauses and understand local thresholds for contract costs.
- A longer fixed term makes it more difficult for school boards/consortia to respond to changes in the external environment and contract compliance and performance issues and need to take appropriate risk mitigation strategies, including wording to modify existing contract terms as required, when determining the appropriate length of contract.

- School boards/consortia are cautioned against prescribing the requirement for a brand new fleet as it may create a barrier to entry for Operators or for those with existing fleet and it may inflate prices. Additional technical points should not be given to younger/brand new fleet as it prohibits competitiveness.
- The Broader Public Sector (BPS) Procurement Directive 7.2.17 has a mandatory requirement in all contracts to contain a termination clause and legal advice should be sought in the development of this clause.
- The BPS Procurement Directive 7.2.22 has the mandatory requirement that all contracts awarded must have a clearly defined contract management and school boards/consortia should adopt the COSBO School Bus Operator Contract Performance Management Program Resource Package (2011) as required.

### Requirements for Legal Review or Board Policy Approval

In considering this opportunity for standardization, school boards/consortia shall seek (1) additional legal advice (albeit all contract language in the contract should be vetted through procurement and legal counsel); (2) if the opportunity is within approved school board policies or if it would require policy review and change approval.

Requirement	Must	Desirable	Unnecessary
Legal		YELLOW	
Board policy		YELLOW	

### Likelihood of Standardization and Simplification

This is the likelihood to standardize and simplify the opportunity in procurement documents.

Likelihood	High	Medium	Low
Standardization	GREEN		
Simplification	GREEN		

## **Opportunity 11: Fully compensate costs incurred to make assets available**

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**The decision to adopt any standardization considerations is a school board decision. For school boards that choose to apply the standardization detailed below, they may apply it as described or choose to apply it with modification(s).**

### ***Opportunity for Standardization***

The most commonly used method of compensation in student transportation contracts, and the method that was identified as exemplary in the STCPR is often referred to as the “Ministry Miles” defined as:

The First Stop to Last Stop and Close Loop Kilometre from the Last Stop back to the First Stop using the shortest path on both the morning and afternoon components of the route. This method includes all slack in between runs to comprise a route. It may be calculated strictly based on route kilometres or a time component, or both.

Standardization of whether school boards/consortia will compensate Operators for change orders is not possible at the time and requires broader consultation. Factors that inform this conclusion include the definition thresholds by which constitutes a significant scope, either an increase or decrease, which would require additional compensation or open a negotiation process. This opportunity includes the requirement to consult school boards/consortia to obtain expert legal and procurement advice. This opportunity will be considered at a later stage.

### **Related Contract Terms**

School boards/consortia need to disclose fully the method of compensation in the contract including definitions of run, route, deadhead, link and other definitions included in the Glossary of Terms.

Other compensatory matters, such as wait fees, return to school fees and so forth must be clearly defined in the Glossary of Terms.

### **Related Procurement Document**

School boards/consortia need to fully disclose the method of compensation in the procurement document and provide as much information about current routes as

possible in excel, and influences on the school boards/consortium during the contract term, to permit Operators to prepare accurate and sustainable pricing.

## Considerations

- If school boards/consortia choose to pay other than the Ministry mile formula, it must be fully explained in the documents and should provide the rationale for the decision. In areas where routes are modified each year, consideration needs to be given to account for compensation of these changes; using the Route formula will assist with this.
- School boards/consortia should understand the capability of their software platform to support calculation of your local area decision on the definition of a route for compensation.
- School boards/consortia should complete major efficiency initiatives prior to procurement to reduce significant changes to the number of vehicles by vehicle type.
- To give proponents the best opportunity to provide accurate and sustainable pricing to serve defined contract requirements, school boards/consortia should provide detailed information in the procurement document including such items as:
  - current route information in Excel (disclaimer subject to change at sole discretion of consortium) including school name & address, number of students, minutes and kilometers, bus monitor requirements, etc.
  - inclement weather delay/cancellation data for the prior 5 years to provide an idea of potential service disruptions;
  - pending Accommodation Review sites;
  - enrollment projections;
  - policy decisions that may inform routing decisions.
- School boards/consortia should consider including in the procurement documents the procedure or guidelines related to the consortium planning process, including as early as possible, providing forecast estimates and impacts to next year route planning to Operators. This may influence an Operator's fleet replacement strategy and support Operator viability.

- Finally, while the opportunity to standardize for terms of compensation related to change orders was deferred, if school board/consortia reduce the number of routes assigned to an Operator within a school year, consideration should be given to provide sufficient notice, or in lieu of notice, fixed rate compensation for a predefined number of days.

### Requirements for Legal Review or Board Policy Approval

In considering this opportunity for standardization, school boards/consortia shall seek (1) additional legal advice (albeit all contract language in the contract should be vetted through procurement and legal counsel); (2) if the opportunity is within approved school board policies or if it would require policy review and change approval.

Requirement	Must	Desirable	Unnecessary
Legal			GREEN
Board policy			GREEN

### Likelihood of Standardization and Simplification

This is the likelihood to standardize and simplify the opportunity in procurement documents.

Likelihood	High	Medium	Low
Standardization	GREEN		
Simplification	GREEN		

## **Opportunity 12: Provide cost of living adjustment based on recognized inflation benchmarks**

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**The decision to adopt any standardization considerations is a school board decision. For school boards that choose to apply the standardization detailed below, they may apply it as described or choose to apply it with modification(s).**

### ***Opportunity for Standardization***

School boards/consortia predominantly have adopted the Ministry of Education Fuel Escalation and De-Escalation clause as the mechanism to compensate Operators for changes in the cost of fuel.

Many school boards/consortia have adopted in contract and procurement documents when exercising optional contract extension years is the Consumer Price Index (CPI) Ontario General annual average posted in January. This number is transparent for all parties to access. School boards/consortia selecting longer fixed term contracts may use this index to reduce the number of forecasted financial bids required by the proponents.

The school bus sector is strictly governed to ensure student safety. Changes in legislative and regulatory requirements can have a significant cost impact to Operators. It is reasonable that sector specific legislative or regulatory changes should be a shared risk between supplier and buyer if the change comes in to effect during a contract period, thus provides an opportunity for a negotiated solution.

### **Related Contract Terms**

Further discussion on this opportunity for standardization will inform developing related contract terms and conditions.

### **Related Procurement Document**

Further discussion on this opportunity for standardization will inform developing related procurement documents with specific attention to the impact on financial evaluation.

# Considerations

- School boards/consortia determine their length of contract. Depending on the duration, consider the ability of proponents to accurately cost their business and market forces for several years into the future.
- To reduce unforeseen market force changes to the Operator, a school board/consortium may request immediate year pricing, one to three years, and then determine a mechanism for adjustments based on recognized inflation benchmarks.
- One such benchmark is the Consumer Price Index. The CPI measures the average change in goods and services and it is a good measure of inflation. There are numerous indexes available for various geographies, and which index is selected should be disclosed in the contract and procurement document. The table below is a multi-year example:

CPI Ontario General Percent Change from Previous Year

	2011	2012	2013	2014	2015
All Items	3.1%	1.4%	1.0%	2.4%	1.2%

Source: <http://www.statcan.gc.ca/tables-tableaux/sum-som/l01/cst01/econ09g-eng.htm>

- However, if CPI is utilized, recognize that the current funding model is not responsive to significant price fluctuations, either positive or negative and these fluctuations may result in service cuts or reallocation of funds from other areas or surpluses that would be clawed back, causing deficits in future years.
- School boards/consortia need to determine the best mechanism for providing cost of living adjustments and may choose to protect budget fluctuations by capping the maximum increase to the Grants for Student Needs (GSN). However, this may result in inflated costs in the price per year requested in the bid document in order to mitigate the risk to the Operators.
- School boards/consortia need to inform the Ministry of Education on the chosen mechanism for providing cost adjustments to Operators to inform reviewing stable funding based on recognized inflation benchmarks.

## Requirements for Legal Review or Board Policy Approval

In considering this opportunity for standardization, school boards/consortia shall seek (1) additional legal advice (albeit all contract language in the contract should be vetted through procurement and legal counsel); (2) if the opportunity is within approved school board policies or if it would require policy review and change approval.

Requirement	Must	Desirable	Unnecessary
Legal		YELLOW	
Board policy			GREEN

## Likelihood of Standardization and Simplification

This is the likelihood to standardize and simplify the opportunity in procurement documents.

Likelihood	High	Medium	Low
Standardization		YELLOW	
Simplification	GREEN		

## **Opportunity 16: Establish Operator qualifications that are common to consortia at the provincial level**

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**The decision to adopt any standardization considerations is a school board decision. For school boards that choose to apply the standardization detailed below, they may apply it as described or choose to apply it with modification(s).**

### ***Opportunity for Standardization***

Establishing common, or standard, Operator qualifications for provincial adoption should be considered within the context of the Auditor General report and in consultation with the Ministry of Transportation.

At this time, it is premature to address the opportunity in full.

There are some items specific to consortia requirements that have been addressed in Schedule A and Schedule B as well as Contract Performance Management (CPM) and Operator Audits which support the interest in standardizing requirements at the provincial level.

School boards/consortia should request an Operator's Commercial Vehicle Operating Record (CVOR) Level II Abstract summary to ensure that the Operator has been rated by the Ministry of Transportation as Satisfactory-Unaudited as a minimum standard.

### **Considerations**

- Further consultation with the MTO is required to understand the impact of a CVOR that states an Operator has a warning letter. This rating may influence a school board/consortium from awarding a contract.
- Further consultation with school boards/consortia on consistency of key performance indicators and data input definitions is required. School boards/consortia are encouraged to make KPIs available to Operators to gain greater insight into the expectations for performance.
- If a concern arises through the consortium's contract performance process, the consortia has the right to contact MTO to request an inspection.

## Requirements for Legal Review or Board Policy Approval

In considering this opportunity for standardization, school boards/consortia shall seek (1) additional legal advice (albeit all contract language in the contract should be vetted through procurement and legal counsel); (2) if the opportunity is within approved school board policies or if it would require policy review and change approval.

Requirement	Must	Desirable	Unnecessary
Legal	RED		
Board policy			GREEN

## Likelihood of Standardization and Simplification

This is the likelihood to standardize and simplify the opportunity in procurement documents.

Likelihood	High	Medium	Low
Standardization			RED
Simplification			RED

## **Opportunity 17: Standardize requirements, service levels and the format for route descriptions and rate adjustments across consortia as much as possible**

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**The decision to adopt any standardization considerations is a school board decision. For school boards that choose to apply the standardization detailed below, they may apply it as described or choose to apply it with modification(s).**

### ***Opportunities for Standardization***

This preliminary list includes but is not limited to the following items for consideration:

- The inclement weather rate outlines the payment (if any) to an Operator in the event of service is cancelled due to inclement weather.
- The labour disruption rate outlines the payment (if any) to an Operator in the event that service is cancelled due to a labour disruption at the school board level.
- The labour disruption rate outlines the payment (if any) to an Operator in the event that service is cancelled due to labour disruption by school bus drivers.

### **Sample Contract Clause**

In the event of a cancellation due to inclement weather or school facility issue, the consortium shall pay 100% of the Base Rate per vehicle with no additional compensation for time or kilometres.

In the event of a cancellation due to a School Board Labour Disruption, the consortium shall pay 100% of the Base Rate per vehicle with no additional compensation for time or kilometres.

If a Consortium does not have a Base rate, the Consortium shall pay 85% of the total daily rate.

In the event of a work stoppage by the Operator, or if for any other reason (except inclement weather conditions as hereafter set forth), the transportation of students pursuant to this Agreement is not provided by the Operator, no payment shall be made to the Operator in respect of those days for which such service is not provided.

Consideration on circumstances that are beyond the Operator’s control, such as *Force Majeure*, may be given.

### Considerations

- There should be a clear identification of the minimum number of days paid to the Operator within the contract.
- Paying the Base rate during incidents of inclement weather or School Board labour disruption days assists in compensating wages and operational costs still incurred by the Operator.
- The compensation rate (whether based on Base or Total Daily rate) should be clearly identified within the contract.

### Requirements for Legal Review or Board Policy Approval

In considering this opportunity for standardization, school boards/consortia shall seek (1) additional legal advice (albeit all contract language in the contract should be vetted through procurement and legal counsel); (2) if the opportunity is within approved school board policies or if it would require policy review and change approval.

Requirement	Must	Desirable	Unnecessary
Legal			GREEN
Board policy			GREEN

### Likelihood of Standardization and Simplification

This is the likelihood to standardize and simplify the opportunity in procurement documents.

Likelihood	High	Medium	Low
Standardization	GREEN		
Simplification	GREEN		

## **Opportunity 18: Limit Information sessions requiring a physical presence as much as possible**

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**The decision to adopt any standardization considerations is a school board decision. For school boards that choose to apply the standardization detailed below, they may apply it as described or choose to apply it with modification(s).**

### ***Opportunity for Standardization***

If information sessions are conducted, the consortium should consider making attendance optional and informing potential proponents that the information being presented is restricted to the information contained within the procurement document.

Information sessions are a valuable part of the process, but school boards/consortia should not make attendance mandatory.

### **Related Procurement Document**

<Insert Consortia Name> will conduct one (1) Proponent information session. Attendance at the information session is recommended, but not mandatory, and is restricted to two (2) people per Proponent. Teleconferencing will be available for any proponents that do not wish to attend in person. The information session will be held (Date) at (time) local time at (location).

If a proponent would like to use the teleconference capability, please contact <Supply Chain Manager/Consortium Manager Name> and an email with sent with the teleconferencing details.

### **Considerations**

- School boards/consortia release procurement documents well in advance of the Information Session. The opportunity for questions and issuance of addendum may be considered in the timeline of the Information Session to add the greatest value. For example, the Information Session can include a verbal presentation of Addendum 1 that will be posted publicly shortly thereafter.
- School boards/consortia can make information presented available using other technologies to improve the reach beyond those who can physically attend (i.e. video or teleconferencing, podcast, webinar).

- This opportunity for standardization relates only to the competitive procurement process. Mandatory meetings held by school boards/consortia while operationalizing a contract is not related to this opportunity.

### Requirements for Legal Review or Board Policy Approval

In considering this opportunity for standardization, school boards/consortia shall seek (1) additional legal advice (albeit all contract language in the contract should be vetted through procurement and legal counsel); (2) if the opportunity is within approved school board policies or if it would require policy review and change approval.

Requirement	Must	Desirable	Unnecessary
Legal			GREEN
Board policy			GREEN

### Likelihood of Standardization and Simplification

This is the likelihood to standardize and simplify the opportunity in procurement documents.

Likelihood	High	Medium	Low
Standardization	GREEN		
Simplification	GREEN		

## **Opportunity 19: Limit information that is collected to that which will be evaluated according to disclosed criteria**

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**The decision to adopt any standardization considerations is a school board decision. For school boards that choose to apply the standardization detailed below, they may apply it as described or choose to apply it with modification(s).**

### ***Opportunity for Standardization***

Wherever possible, school boards/consortia should limit the information collected from proponents to only what will be evaluated.

Schools boards/consortia should list all documentation required, define what stage of evaluation it falls under and clear instructions on how it will be evaluated.

### **Related Procurement Document**

Opportunity 20 includes clear definitions of each procurement stage associated with Request for Proposal (RFP) competitive procurement. Align documents requested with the stages defined in the sample stages.

### **Considerations**

- As noted in the STCPR, school boards/consortia should not be requesting information that is not mandatory or subject to evaluation.
- School boards/consortia should request proof of financial viability, but should be careful to define the stage for evaluation and the methodology for evaluation. Further, evaluation should be performed by a qualified individual who can render a position on a proponent's financial viability based on the information requested and provided.
- Legal and procurement advice needs to be solicited if the award differs from the proponent's proposal indicated preferences as the evidence of financial viability may not be in the scope of the award and further solicitation may be required.
- Legal and procurement advice needs to be solicited as to activities and documentation that may be solicited to school boards/consortia in the due diligence stage of contract pre-award.

- Ensure that the procurement timelines allow enough time for the due diligence process.

### Requirements for Legal Review or Board Policy Approval

In considering this opportunity for standardization, school boards/consortia shall seek (1) additional legal advice (albeit all contract language in the contract should be vetted through procurement and legal counsel); (2) if the opportunity is within approved school board policies or if it would require policy review and change approval.

Requirement	Must	Desirable	Unnecessary
Legal	RED		
Board policy		YELLOW	

### Likelihood of Standardization and Simplification

This is the likelihood to standardize and simplify the opportunity in procurement documents.

Likelihood	High	Medium	Low
Standardization		YELLOW	
Simplification	GREEN		

## **Opportunity 20: Maintain clear distinctions between mandatory requirements, rated criteria, contract obligations, evidence and evaluations**

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**The decision to adopt any standardization considerations is a school board decision. For school boards that choose to apply the standardization detailed below, they may apply it as described or choose to apply it with modification(s).**

### ***Opportunity for Standardization***

The BPS Procurement Directive defines the requirements for the competitive procurement processes. Predominantly Request for Proposal (RFP) has been the most exercised form of competitive procurement in the province and there is an opportunity to ensure the process stages are clearly defined and delineated.

Several scoring scales for technical evaluation are available, and samples have emerged as leading practices for clarity of both the evaluation team member and the proponent. School boards/consortia can deploy more than one scoring scale within a specific process depending on the technical requirement being evaluated. Whichever method deployed, it is critical that the scoring scale is defined clearly in the procurement document.

### **Related Procurement Document**

#### **Sample Evaluation Method for Request for Proposal:**

**Stage I** - Stage I will consist of a review to determine which Proposals comply with all of the mandatory requirements. Proposals which do not comply with all of the mandatory requirements, will be disqualified as non-compliant and not evaluated further.

**Stage II** - Stage II will consist of a scoring of the Technical Response, by the Evaluation Team of each compliant Proposal on the basis of the rated requirements other than price.

**Stage III** - Upon completion of Stage II, for all compliant Proposals and only if the minimum threshold is met, the sealed pricing envelope provided with each Proposal will then be opened and Stage III will consist of a scoring of the pricing submitted.

**Stage IV** - At the conclusion of Stage III, all scores from Stage II and Stage III, for each Proponent, will be added to determine each Proponent's cumulative score. The Proponent with the highest cumulative score will be the Preferred Proponent. Prior to proceeding with the contract award, consortia must have a due diligence or precondition of award phase, where they will require the Preferred proponent(s) to send the required documents such as the proof of insurance, the vehicle registration, MTO confirmation of compliance, etc.

## Sample Scoring Scales:

When evaluating, the Consortium may choose different rating scales for different criteria. There are several scales below designed to provide options for consideration.

Criteria	Score out of 1 point
Provides a satisfactory response	1
Provides an unsatisfactory or no response	0

Criteria	Score out of 2 points
Provides a satisfactory response	2
Provides a partially satisfactory response	1
Provides an unsatisfactory or no response	0

Criteria	Score out of 3 points
Provides no response	0
One point for a response that addresses the request	1
Add a point for a clear demonstration of actual experience	2
Add a point for value added or external evidence, provided by a third party	3

Criteria	Score out of 5 points
No response	0
Response did not reference the minimum standards level and did not demonstrate their ability to attain the minimum standards level.	1
Response did illustrate knowledge of minimum standards but did not demonstrate their ability to attain the minimum standards level.	2
Response acknowledged their ability to attain the minimum standards level.	3
Response acknowledged their ability to attain the minimum standard and demonstrated this ability through auditing of the requirement.	4
Response acknowledged their ability to meet minimum standard levels, this was illustrated through an audit process and demonstrated examples of changes made due to audit information were pursued.	5

## Considerations

- Evaluation Teams may decide to use more than one scale depending on the question being evaluated. Whichever scale(s) a Consortium chooses to use, it is crucial that the scoring scale and method are both clearly explained in the proposal document.

## Requirements for Legal Review or Board Policy Approval

In considering this opportunity for standardization, school boards/consortia shall seek (1) additional legal advice (albeit all contract language in the contract should be vetted through procurement and legal counsel); (2) if the opportunity is within approved school board policies or if it would require policy review and change approval.

Requirement	Must	Desirable	Unnecessary
Legal			GREEN
Board policy			GREEN

## Likelihood of Standardization and Simplification

This is the likelihood to standardize and simplify the opportunity in procurement documents.

Likelihood	High	Medium	Low
Standardization		YELLOW	
Simplification	GREEN		

**Opportunities 21 and 22: Maintain clear distinctions between different categories of mandatory requirements and disclose contract obligations clearly and transparently, and in the appropriate place**

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The decision to adopt any standardization considerations is a school board decision. For school boards that choose to apply the standardization detailed below, they may apply it as described or choose to apply it with modification(s).

***Opportunity for Standardization***

Clearly identify mandatory submission requirements and provide a mandatory requirements checklist form in order to assist both evaluators and proponents.

**Related Procurement Document**

**Sample Mandatory Requirement Checklist:**

**Insurance:**

1. Submit proof of insurance, as requested by the Consortium during the due diligence phase as a precondition of award and by August 15<sup>th</sup> or prior to policy expiration of each subsequent year of the contract duration.

Service Delivery Requirements	YES	NO
Are you able to meet all of the Insurance requirements as outlined above?	<input type="checkbox"/>	<input type="checkbox"/>

**Vehicle Registration:**

1. Submit vehicle registration as requested by the Consortium during the due diligence phase, prior to the contract award and by August (date) of each subsequent year of the contract duration.

Service Delivery Requirements	YES	NO
Are you able to meet all of the Vehicle Registration requirements as outlined above?	<input type="checkbox"/>	<input type="checkbox"/>

**Confirmation of Ministry of Transportation Compliance:**

1. Submit confirmation of Ministry of transportation compliance regarding vehicle inspections, as requested by the Consortium

during the due diligence phase, prior to the contract award and by August (date) of each subsequent year of the contract duration.

<b>Service Delivery Requirements</b>	<b>YES</b>	<b>NO</b>
Are you able to meet all of the confirmation of MTO compliance requirements as outlined above?	<input type="checkbox"/>	<input type="checkbox"/>

**Considerations:**

- There are no further considerations at this time.

**Requirements for Legal Review or Board Policy Approval**

In considering this opportunity for standardization, school boards/consortia shall seek (1) additional legal advice (albeit all contract language in the contract should be vetted through procurement and legal counsel); (2) if the opportunity is within approved school board policies or if it would require policy review and change approval.

<b>Requirement</b>	<b>Must</b>	<b>Desirable</b>	<b>Unnecessary</b>
Legal			GREEN
Board policy			GREEN

**Likelihood of Standardization and Simplification**

This is the likelihood to standardize and simplify the opportunity in procurement documents.

<b>Likelihood</b>	<b>High</b>	<b>Medium</b>	<b>Low</b>
Standardization		YELLOW	
Simplification	GREEN		

**Opportunities 23, 24 and 25: Articulate clear evaluation criteria directly linked to ability to perform the required service; seek quantitative and objective evidence whenever possible; and where qualitative evidence is necessary, use a checklist method of evaluation**

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**The decision to adopt any standardization considerations is a school board decision. For school boards that choose to apply the standardization detailed below, they may apply it as described or choose to apply it with modification(s).**

### ***Opportunity for Standardization***

Deliverables for evaluation include all service requirements and encompass checklists, qualitative as well as quantitative evidence necessary for evaluation. School boards/consortia should weight each item based on the importance they place on the item.

### **Related Procurement Document**

#### **Sample Deliverables and Deliverable Evaluation**

In the procurement document, school boards/consortia should include a section on Deliverables and Evaluation, which would include all service requirements and would encompass checklists, qualitative as well as quantitative evidence necessary for evaluation. Consortia/Evaluation Teams should weight each item based on the importance they place on the item.

We have included a **Sample Technical Section - Appendix 1**. This is designed to be an example of evaluated sections, using the broad categories of general, communications/customer service and inclement weather for illustrative purposes.

## **Sample Technical Section - Appendix 1**

The school board/consortium proposal document may be set out as the following example provided for illustrative purposes, noting that each consortium will define their own deliverables.

### **Service Delivery Requirements**

The Proponents must confirm their ability to meet by the time of contract execution, all of the requirements for the deliverables. The Consortium should include a summary page of all deliverables as an Appendix in the Proposal Submission.

#### **1.0 General:**

In this section, the Consortium will list all the items that are required from the service provider for the duration of the contract.

Examples of these requirements are items such as:

1. Assign a key contact person to maintain communication with:
  - Director or designate of the Consortium;
  - Parents/Guardians;
  - Schools.
2. Be responsible for the performance of the contractual obligations.
3. Be expected to co-operate fully with the Director or designate of the Consortium.
4. Contact the Director or designate of the Consortium for direction and/or assistance for serious behavioral incidents involving the immediate safety of students on the school vehicle.
5. Assist the Director or designate of the Consortium in maintaining accurate data on the transportation of students.
6. Actively support and participate in school transportation initiatives that are designed to improve safety, including emergency evacuation drills.
7. Ensure that no students are transported unless approved by the Director or designate of the Consortium, except in emergency situations then the rider must be approved by the Consortium and/or School. No parent/guardian or any student over the age of twenty- one (21) may ride the school vehicle unless approved by the Director or designate of the Consortium.
9. Ensure that all personal information on parents, students, is up to date and stored in accordance with the *Freedom of Information and Protection of Privacy*

*Act (FIPPA) and/or the Municipal Freedom of Information and Protections of Privacy Act (MFIPPA).*

10. Make all reasonable efforts to maintain the same drivers on each route.

<b>Service Delivery Requirements</b>	<b>YES</b>	<b>NO</b>
Are you able to meet all of the general service requirements as outlined above?	<input type="checkbox"/>	<input type="checkbox"/>

***The Consortium could then decide on item(s)/question(s) to evaluate the section above. Such as:***

- a) Referring to the general service requirements as outlined above, please describe how you ensure that all personal information on Parents, Students and Schools is stored securely.

Please provide a clear, concise and factual response that demonstrates your ability to meet the following service requirements. Please note that this question will be rated on **{scoring scale selected as selected by Consortium; illustrate scoring scale with definitions below}**

## **2.0 Communications/Customer Service**

***In this section, the Consortium would list all the items that are required from the service provider for the duration of the contract.***

Examples of these requirements are items such as:

1. The key contact person or their designate shall be available to respond to inquiries, emergencies etc. from Schools, parents/guardians and the Director or designate of the Consortium.
2. Notify the Director or designate of the Consortium, post the delay on the online form (this form would be included as an appendix to the document attached) and coordinate if a school vehicle is more than ten (10) minutes late.
3. Ensure that you and/or your employees conduct all communications with the public, the School's staff, parents and students in a positive and professional manner.
4. The Transportation Provider will ensure open communications with officials from the Schools, the Director or designate of the Consortium, and

parents/guardians/students through various communications methods including:

- a) Email;
- b) Text messages;
- c) Telephone; and
- d) Any other appropriate communications methods.

5. Provide the following information:

- a) Route schedules;
- b) Delays and cancellations;
- c) Procedure and method parent/guardian, student complaints or issues and their resolution; and
- d) Other information as required.

6. The Transportation Provider will ensure completion of the Transportation Incident Reporting Form (this form would be included as an appendix to the document) when issues arise and distribute to the parties as indicated on the form. Information may include but is not limited to:

- a) Issues with student behaviour;
- b) Safety concerns; and
- c) Other potential problems or issues.

Service Delivery Requirements	YES	NO
Are you able to meet all of the communications requirements as outlined above?	<input type="checkbox"/>	<input type="checkbox"/>

***The Consortium could then decide on item(s)/question(s) to evaluate the section above. Such as:***

a) Referring to the communication service requirements as outlined above, please describe your communications procedures in the event of route changes and changes to pick up/drop-off points.

Please provide a clear, concise and factual response that demonstrates your ability to meet the following service requirements. Please note that this question will be rated on **{scoring scale selected as selected by Consortium; illustrate scoring scale with definitions below}**

b) Referring to the communication service requirements as outlined above, please describe your communications procedures in the event of detours and road closures.

Please provide a clear, concise and factual response that demonstrates your ability to meet the following service requirements. Please note that this question will be rated on **{scoring scale selected as selected by Consortium; illustrate scoring scale with definitions below}**

b) Please illustrate that you have IT support.

Please provide a clear, concise and factual response that demonstrates your ability to meet the following service requirements. Please note that this question will be rated on **{scoring scale selected as selected by Consortium; illustrate scoring scale with definitions below}**

### 3.0 Inclement Weather or Other Disruptions to Service

*In this section, the Consortium would list all the items that are required from the service provider for the duration of the contract.*

Examples of these requirements are items such as:

#### **Inclement weather**

In situations where a disruption to service has occurred or may occur due to inclement weather, the following guidelines will be followed:

1. In cooperation with the transportation providers and the Director/designate of the Consortium, the final decision about whether to provide transportation in inclement weather will be made by the Director of the Consortium.
2. When a decision has been made to delay or cancel transportation due to inclement weather, the Director/designate of the Consortium will work with the transportation providers to develop an estimated time that service will be restored and communicate that information to each of the School Boards affected. The Director/designate of the Consortium will notify the media.
3. Contingency plans should be developed in co-operation with the Director/designate of the Consortium and transportation providers to ensure that responses and communications are well coordinated.

Service Delivery Requirements	YES	NO
Are you able to meet all of the Inclement weather requirements as outlined above?	<input type="checkbox"/>	<input type="checkbox"/>

*The Consortium could then decide on item(s)/question(s) to evaluate this section. Such as:*

- a) Referring to the inclement weather guidelines as outlined above, please describe contingency plans that you will employ to coordinate responses and communications in the case of inclement weather.

Please provide a clear, concise and factual response that demonstrates your ability to meet the following service requirements. Please note that this question will be rated on **{scoring scale selected as selected by Consortium; illustrate scoring scale with definitions below}**

- b) Referring to the submitted organizational chart, detail what position will be responsible for the inclement weather day procedure and detail the execution of the inclement weather procedure to fulfill contractual obligations set out in the Agreement.

Please provide a clear, concise and factual response that demonstrates your ability to meet the following service requirements. Please note that this question will be rated on **{scoring scale selected as selected by Consortium; illustrate scoring scale with definitions below}**

#### **4.0 On Road Transportation Delays**

***In this section, the Consortium would list all the items that are required from the service provider for the duration of the contract.***

Examples of these requirements are items such as:

1. All arrivals to and departures from a School have a fifteen (15) minute window during which they are not considered to be late. Where an arrival or departure will not happen within the allotted window:
  - a) The Transportation Provider will ensure that the Director or designate of the Consortium and the affected School(s) concerned are notified as soon as possible.
2. Should a vehicle become inoperative en route in either direction, or should there be more than a ten (10) minute delay, it will be the responsibility of the Transportation Provider to ensure that the Director or designate of the Consortium and the affected Schools are notified as soon as possible. The Transportation Provider will call the parents/guardians.
3. It will be the responsibility of the Transportation Provider to provide alternate transportation with a minimum of delay.

<b>Service Delivery Requirements</b>	<b>YES</b>	<b>NO</b>
Are you able to meet all of the Delays and Break Downs requirements as outlined above?	<input type="checkbox"/>	<input type="checkbox"/>

***The Consortium could then decide on item(s)/question(s) to evaluate the section above. Such as:***

- a) Referring to the service requirements as outlined above in situations of transportation delays, please describe your process to ensure continuity of service during a vehicle breakdown or delay.

Please provide a clear, concise and factual response that demonstrates your ability to meet the following service requirements. Please note that this question will be rated on **{scoring scale selected as selected by Consortium; illustrate scoring scale with definitions below}**

- b) Please detail what steps are taken to ensure the continuation of services should a regular driver be unable to work.

Please provide a clear, concise and factual response that demonstrates your ability to meet the following service requirements. Please note that this question will be rated on **{scoring scale selected as selected by Consortium; illustrate scoring scale with definitions below}**

**Other categories that could be part of the evaluated Technical section could include but are not limited items such as:**

- Accidents;
- Driver and/or Monitor Requirements;
- Safety;
- Operations;
- Vehicles;
- Drop off and Pick up Procedures;
- Routes and
- Training.

## Appendix B - Service Delivery Requirements Form

Service Delivery Requirements	YES	NO
Are you able to meet all of the general service requirements as outlined in section __? (Please refer to page __)	<input type="checkbox"/>	<input type="checkbox"/>
Are you able to meet all of the communication service requirements as outlined in section __? (Please refer to page __)	<input type="checkbox"/>	<input type="checkbox"/>
Are you able to meet all of the inclement weather guidelines as outlined in section __? (Please refer to page __)	<input type="checkbox"/>	<input type="checkbox"/>
Are you able to meet all of the service requirements as outlined in section __ in situations of transportation delays and break downs? (Please refer to page __)	<input type="checkbox"/>	<input type="checkbox"/>
Are you able to meet all of the service requirements as outlined in section __ should an accident occur? (Please refer to page __)	<input type="checkbox"/>	<input type="checkbox"/>
Are you able to meet all of the insurance requirements as outlined in section __? (Please refer to page __)	<input type="checkbox"/>	<input type="checkbox"/>
Are you able to meet all of the driver training and security screening requirements as outlined in section __? (Please refer to page __)	<input type="checkbox"/>	<input type="checkbox"/>
Are you able to enforce all of the safety requirements as outlined in section __? (Please refer to page __)	<input type="checkbox"/>	<input type="checkbox"/>
Are you able to enforce all of the operations requirements as outlined in section __? (Please refer to page __)	<input type="checkbox"/>	<input type="checkbox"/>
Are you able to meet the vehicle requirements as outlined in section __ pertaining to the route(s) that the proponent is submitting the proposal for? (Please refer to page __)	<input type="checkbox"/>	<input type="checkbox"/>
Are you able to meet the drop off and pick up service requirements as outlined in __? (Please refer to page __)	<input type="checkbox"/>	<input type="checkbox"/>
Are you able to enforce the Routes procedures as outlined in __? (Please refer to page __)	<input type="checkbox"/>	<input type="checkbox"/>

## Requirements for Legal Review or Board Policy Approval

In considering this opportunity for standardization, school boards/consortia shall seek (1) additional legal advice (albeit all contract language in the contract should be vetted through procurement and legal counsel); (2) if the opportunity is within approved school board policies or if it would require policy review and change approval.

Requirement	Must	Desirable	Unnecessary
Legal		YELLOW	
Board policy			GREEN

## Likelihood of Standardization and Simplification

This is the likelihood to standardize and simplify the opportunity in procurement documents.

Likelihood	High	Medium	Low
Standardization		YELLOW	
Simplification	GREEN		