



Ministry of Education
Effectiveness & Efficiency
Follow-up Review

Student Transportation Services
of Central Ontario

E&E Follow-up Review

May 2013

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 Student Transportation Services of Central Ontario (hereafter “STSCO” or “the Consortium”) conducted by a review team selected by the Ministry of Education (hereafter the “Ministry”).

The first E&E Review report was issued in April 2007 (the original report) and this follow-up report is intended to document 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 is then used to determine an overall rating for the Consortium that will be used by the Ministry to determine any in-year funding adjustments that are to be provided.

Original review summary

The original review of Consortium Management found that the Consortium had appropriate organizational and oversight structures and practices in place to ensure accountability and transparency. It was recommended that the Consortium become a separate legal entity to allow them to address issues related to contracting and governance that were identified by the review.

The review of Policies and Practices noted that to be more efficient, the Consortium should continue with established plans to harmonize Member Board policies and decrease the average vehicle age. In addition, STSCO was advised to review its delivery of courtesy and special needs transportation to see if further efficiencies can be gained.

The review of the Consortium’s Routing and Technology found that while STSCO had done an excellent job of acquiring, implementing and utilizing a variety of technology tools and applications to improve the management of routes and schedules and to communicate with its Member Boards and other stakeholders, opportunities still existed for improving the use of transportation data as part of a regular reporting structure.

For the Consortium’s Contracts, it was found that once a transparent and efficient contract structure could be in place, STSCO should focus on improving the effectiveness of their contracting practices through continued improvements to the monitoring of its contracts.

As a result of the initial review, the Consortium was rated **Moderate-High**

E&E Follow-up Review summary

In Consortium Management, the Consortium has not addressed many of the recommendations made in the original review and has not undertaken actions to keep up with best practices in the sector. STSCO still has many significant recommendations for improvement in Consortium Management including, obtaining separate legal entity status, operationalizing strategic plans, undertaking staff evaluations (CAO evaluation included), undertaking succession planning (with turnover a significant issue at the Consortium) and preparing financial forecasts. Few accomplishments have been made since the original E&E Review. The original E&E review noted that STSCO is a functional, professional and well-structured organization that is able to deliver efficient services to its Partner Boards. The same remains true today and the Consortium continues to benefit from the positive, trusting and respectful relationships between its stakeholders.

For Policies and Practices, the Consortium continues to strive toward a high rating which is evidenced by STSCO's Route Verification process that promotes effective, efficient, and equitable services to each of its Member Boards. The establishment of STSCO as the sole point of reference for all harmonized transportation policies and operational guidelines is a necessary step to achieve a High rating.

In relation to Routing and Technology, the Consortium showed great improvement especially in the areas of staff training and in its efforts to correct the data provided by its Member Boards. It is recommended that the Consortium re-examine bell times on a systemic basis across the service area in order to fully understand potential increased efficiencies.

In Contracting, STSCO has made an attempt at competitive procurement, although this is presently postponed. The Consortium has developed a detailed Operator Performance Monitoring System (OPMS). STSCO should decrease the average age of the fleet through contracting requirements and implement more rigorous monitoring practices to ensure compliance to contractual requirements.

Funding Adjustment

As a result of this review of current performance, the Consortium has been rated **Moderate-High**. Based on this evaluation and the funding gap in 2011-2012, the transportation allocation for the Kawartha Pine Ridge District School Board, the Conseil Scolaire de District Catholique Centre-Sud, and the Peterborough Victoria Northumberland and Clarington Catholic District School Board will remain unchanged in the 2012-2013 school year.

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

1 Introduction

1.1 Background

1.1.1 Transportation Reform

The Ontario Ministry of Education has introduced significant education reforms over the past six years. One of the focuses of their reforms is in support of school board management processes and a 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. STSCO was reviewed originally in Phase 1 of the E&E Reviews completed in April 2007.

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 2007.

From 2006-07 to the end of 2011-12 school year, the Ministry has provided a total of \$32M in additional funding to the reviewed boards.

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 five, six and seven (currently in phase five);
- 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 five, six and seven. 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 2007 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 2007 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 2007 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 2007 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 in the following figure:

Figure 1: Criteria for an Effective and efficient consortium

Consortium management	Policies and Practices	Routing and Technology	Contracts
<ul style="list-style-type: none"> • 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 <i>Freedom of Information and Privacy</i> legislation 	<ul style="list-style-type: none"> • 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 in corporate 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 	<ul style="list-style-type: none"> • Transportation management software has been implemented and integrated into the operational environment • Key underlying data sets (e.g., student and map data) are regularly updated • Responsibility and accountability for the updates is clearly defined and performance is regularly reviewed • Coding structures are established to facilitate scenario modeling and operational analysis of designated subgroups of students, runs, schools, etc. • Procedures are in place to use software functionality to regularly evaluate operational performance and model alternatives to traditional practices • Disaster recovery plans and back up procedures are established, performed regularly, and tested • Operational performance is regularly monitored through KPI and reporting tools are used to distribute results to appropriate parties • Technology tools are used to reduce or eliminate manual production and distribution activities where possible in order to increase productivity • Training programs are established in order to increase proficiency with existing tools • Route planning activities utilize system functionality within the defined plan established by Consortium management 	<ul style="list-style-type: none"> • 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

1.3.2 Funding adjustment

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

Table 1: Funding Adjustment Formula

Overall Rating	Effect on deficit Boards ¹	Effect on surplus Boards
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

¹ This refers to Boards that have a deficit/surplus on student transportation (see Section 6 – Funding Adjustments)

1.3.3 Purpose of report

This Report serves as the deliverable for the E&E Review conducted on the Consortium by the E&E Review Team during the week of February 7, 2013.

1.3.4 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.

1.3.5 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-High
Consortium Management – New E&E rating	Moderate-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 an organization's governing body. 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

The Consortium did not have any recommendations in this area in the original E&E Review completed in April 2007.

2.2.2 Incremental progress

2.2.2.1 Governance Structure

The Consortium's governance structure is similar to what was in place during the original E&E Review. CSDCCS is now a full member of the Consortium and joined in March 2007. The Governance Committee continues to meet a minimum of four times every year, with other ad hoc meetings as required.

The Consortium agreement outlines that the responsibilities of the Governance Committee including, among other responsibilities, the review and approval of the annual STSCO administrative, operating and capital budgets, the provision of input to the annual performance review of the Chief Administrative Officer (CAO), and the publication of an annual plan on its performance, to be used to communicate with stakeholders. However, the Governance Committee does not presently directly fulfill these three responsibilities.

The CAO has not been evaluated since the inception of the Consortium. However, the Governance Committee is currently developing an appraisal process for the Chief Administration Office, which is expected to take place during the 2012-2013 school year.

Lastly, the CAO published a report on the Consortium 2011-2012 performance, which was posted on the Consortium website. STSCO plans to provide a similar annual report every year, going forward.

2.2.3 Opportunities for improvement

2.2.3.1 Align the documented role of the Governance Committee with day-to-day practice

The Consortium agreement outlines the responsibilities of the Governance Committee, some of which are not presently being undertaken by the committee. These include the review and approval of the annual STSCO budgets, the CAO's annual performance review and the publication of an annual plan on the Consortium's performance. Each of these activities is important to the efficient and effective operation of the Consortium, thus the Governance Committee should either perform these activities or the documentation should be updated to reflect the reality that the Boards are reviewing and approving their respective portions of the budget and the CAO is publishing an annual report.

2.2.3.2 Institute a performance appraisal policy and process for the CAO

The performance appraisal of the CAO is encouraged. A well designed performance appraisal process will help ensure the strategic priorities of the Consortium are aligned with those of its CAO and ensure the CAO is provided both positive reinforcement and constructive criticism to motivate continuous improvement and professional development.

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

Entity Status

The ²Member Boards should explore the formal creation of STSCO as a separate legal entity. STSCO is governed by the terms and conditions outlined in the Consortium Agreement entered into by the Member Boards. Although not a separate legal, it is recognized that STSCO is functioning well at the current time. Over the long term, changing political environments and potential disputes amongst the Member Boards could cause this structure to destabilize. The formalization (through incorporation or legal partnership) of STSCO would provide benefits from an organizational perspective, and in particular, allow staff to address some of the issues relating to funding, liability, staff management and contracts as outlined in this report.

2.3.2 Incremental progress

2.3.2.1 Separate Legal Entity

STSCO is presently not a separate legal entity. The employees of STSCO are direct employees of PVNC and KPR, and are either unionized or non-unionized. The employees of STSCO are therefore subject to the administrative policies of their employer Board and unionized employees are also subject to the collective agreements of their respective union.

2.3.2.2 Organization of the Entity

STSCO's organizational structure is similar to what was in existence during the initial E&E review, except that the former Mapping Technician and Data Clerk position have now been merged into one position, Data Analyst. The organizational structure is such that reporting relations are clear.

² References to Partner Boards in the original recommendations were changed to "Member Boards" to reflect more appropriate reflection of roles.

2.3.2.3 Job descriptions

Job descriptions are available for all positions within the Consortium and provide a very high level description of role requirements.

2.3.3 Opportunities for improvement

2.3.3.1 Establishment of a Separate Legal Entity

We recommend that the Consortium be incorporated as a separate legal entity. This structure will provide the Consortium with independence in terms of managing its daily operations; ensures that the structure and mandate of the Consortium remain consistent despite potential changes at the Board level (i.e., changes in trustees, Board s, 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, most importantly with bus operators, and as such is limiting liability to the Consortium and in turn, limiting liability to Boards.

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

2.3.3.2 Job descriptions

It is recommended that the Consortium continues to ensure that sufficient detail is provided to allow for full comprehension of roles and responsibilities, ensuring that staff can efficiently execute on their daily duties and help to ensure a smooth transition in the event of staff turnover. Job descriptions should make reference to actual operational responsibilities and support appropriate segregation of duties and should provide more detail than a job posting. The Consortium has some of this level of detail in its operating plan as well as its live database – these elements should be pulled together into a single reference job description.

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

Services purchased from STSCO

Currently, STSCO sells student transportation services to CSDCCS and the Area First Nations groups. However, there are no formal contracts in place with these parties. Formal contracts protect the Consortium by clearly identifying scope of services and fees. Without a contract in place, there is a higher risk that disputes could arise over misunderstandings. Formal agreements should be established for all services sold to ensure that key elements such as scope of services provided, fees, insurance/liabilities, quality of service, dispute resolutions and term are clearly articulated and agreed upon prior to the delivery of service.

Charges to Service Purchasing Boards

STSCO should evaluate the manner in which it determines overhead charges to purchasing Boards to ensure charges are reflective of actual overhead costs. STSCO charges CSDCCS an administrative fee of 2.5% over and above the bus contract costs. However, there is no administrative fee charged to the First Nation groups. Currently, STSCO's administrative fee will allow STSCO to ensure that each Board is paying a fair and equitable portion of management and administrative costs for the services provided. Given that CSDCCS is expected to become a member of the Consortium and that this board represents the largest purchaser of services, addressing this issue would be a proactive effort to properly account for the cost of providing service to any future Purchasing Board.

Support Services provided by Member Boards

STSCO, along with the Member Boards, should revisit their provision of support services to ensure it is equitable and fairly captured as an administrative and operational cost of providing student transportation. This will become more important as membership in STSCO expands. Each Member Board is currently providing a support service to STSCO at their own cost without a charge back to STSCO. KPR is providing the accounting function and PVNC is providing the IT function. By not allocating a cost for these

services to STSCO, then the operational expenses of STSCO are being understated and the true cost to STSCO of providing student transportation services may not be captured. Additionally, if one service is more costly than the other, one Member Board is paying more than required which leads to inequities in the way they are sharing costs. STSCO should also assess whether all costs are being captured – for example, payroll administrative costs, and superintendents time.

2.4.2 Incremental progress

2.4.2.1 Services purchased from STSCO

STSCO still provides student transportation services to the Area First Nations (including Curve Lake and Hiawatha). KPR and PVNC each have an educational services agreement with each First Nation. Each First Nation pays its prorated share of bus routing costs only. Curve Lake First Nation has significantly reduced its ridership as it has instituted its own busing and it is anticipated that service will not be provided by STSCO in future years.

STSCO will continue to provide Hiawatha with student transportation services. There is presently no formal agreement in place with Hiawatha, however, a draft Letter of Understanding was prepared recently, and STSCO is currently in talks with the Band Council to sign the letter.

2.4.2.2 Support services provided by Member Boards

The three Member Boards provide support services to STSCO which include human resources services, payroll services, financial services, purchasing services and computer services. According to the current service level agreements with the Member Boards, these services are still being provided without any charge back to STSCO. It is indicated in the service level agreement that the Boards have mutually decided that services provided by each to STSCO are comparable, and therefore, no charges are to be levied back and forth.

2.4.2.3 Insurance

The Consortium Agreement states that only the Member Boards will be insured. STSCO has gone above and beyond this requirement to regularly renew its Ontario School Boards' Insurance Exchange (OSBIE) insurance policy and has a policy for the present year. In addition, the Member Boards carry their own insurance.

2.4.2.4 Staff performance evaluation, monitoring and training process

The Consortium has created a formal staff performance evaluation process. The Consortium plans to engage in the performance appraisals on an annual basis and in accordance with timelines set by the Chief Administration Officer. The process involves populating the STSCO Employee Performance Appraisal template. The performance evaluation report is signed by the staff supervisors, who are the evaluators. This staff performance evaluation process will be implemented for the first time in the present school year.

There are currently no incentives or implications for staff that are tied to these performance appraisals.

The Consortium also organizes training sessions for staff based on staff needs and appraisals and tracks training completed by staff.

2.4.2.5 Succession Planning

STSCO presently has a policy on succession planning which states that management will endeavour to survey staff on a regular, periodic basis throughout the year to determine if there are any planned retirements or employment changes in the near term. The Consortium has included some succession planning goals in their 3-5 year Cycle Plan. However, no formal succession planning document has been created to ensure the continued smooth operation of the Consortium in the case that any staff member leaves the Consortium or takes a leave of absence from the Consortium either for a short term or long term. Due to the nature of the unionized environment in which the Consortium operates, the Consortium has experienced significant staff turnover in recent years.

2.4.2.6 Strategic Planning

The Consortium has developed a Strategic planning policy and devised a Strategic Plan for a 3-5 year period. The document encompasses short and long term objectives.

Each objective is broken down into a set of goals/activities for the year.

2.4.2.7 Key Performance Indicators

STSCO has developed an array of key performance indicators (KPIs) that have become integrated into the daily management of the system. KPIs are used to measure and track both operational and service trends both for reporting and for operator or organizational improvements. The process for measurement of each of the KPIs is thoroughly documented in a flow chart or matrix format. This includes the area that is being measured, the data required, and communication requirements, how the KPI will be analyzed and reported, the follow-up required, and the frequency. An achievable target and goal is established for each area to help support the philosophy of continuous improvement. While the current KPIs have been monitored ranging from over two years to over six years, the Consortium is continually examining what is being measured and may drop or add a KPI as trends and operational necessities change.

The tracked KPIs are used to develop decision trees, which are graphical representations of the KPIs for each Operator or Member Board, and a summary graphical representation of the KPIs over a period of time. Refer to Figure 2 below for an example of a decision tree, and Table 2 for a list of the KPIs and their measurement frequency.

The Operations Manager develops the decision trees, and development frequency depends on the nature of the KPI being assessed. They are developed either monthly or annually, and on an ad hoc basis as required.

Decision trees are presented to the entire STSCO team and are displayed in the Consortium’s board room to enable each staff member to have access to them and to identify key focus areas which affect each KPI. The summary KPI information is periodically shared with the Administrative team and the Governance Committee to be used to support reports on various matters including annual bell times and policy reviews.

Figure 2: Decision Tree - Key performance Indicator - School Bus Runs

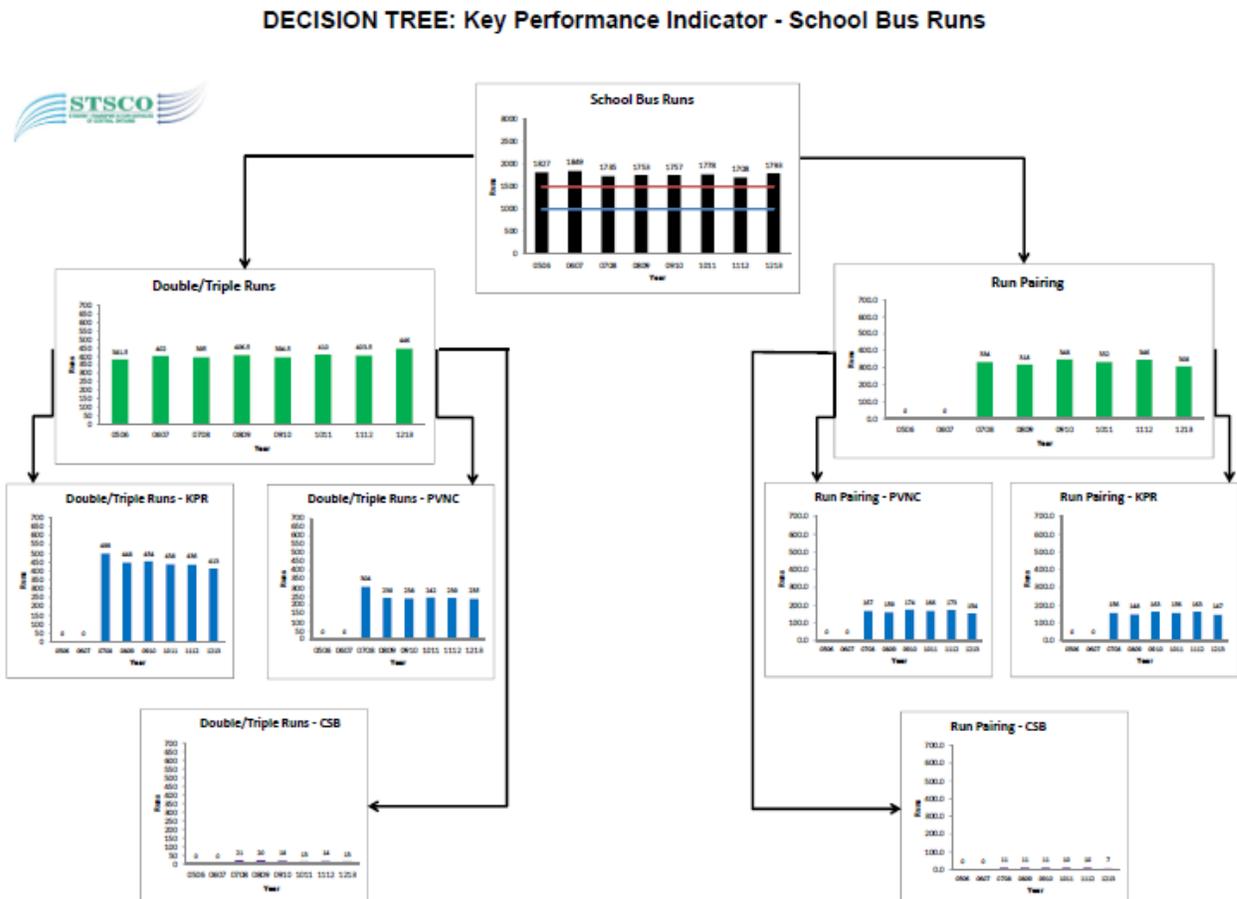


Table 2: KPIs tracked by the Consortium and frequency of reporting

Key Performance Indicator	Measure Frequency
Average Ride Time	Daily and Weekly
Average Walk to Stop	Daily and Weekly
Bell Time Moves	Annually
Capacity Utilization	Daily
Number of Buses	Daily/Weekly and Annually
School Bus Runs	Daily and Weekly
Total Contracted Transportation Cost	Annually
Transported Eligible Bodies	Daily
Transported Non-Eligible Bodies	Daily
Accidents	Daily as they occur
Bus Pass Usage	Monthly
MTO Inspections	Monthly and Annually
On-Time Delivery	Daily
Operational Top Issues	Monthly
Operator Review	Daily and Annually
Overall Operator Performance	Annually
Route Audits	Monthly and Annually
Absenteeism	Daily as required
Accidents – Preventable	Monthly
Code Red	Daily and Weekly
Operator Review – Yearly Average	Annually
Parent-School Surveys	Monthly
Route Verification	Weekly and Monthly

2.4.2.8 Financial forecasting

STSCO is planning operations with future objectives in mind (looking at bell time changes and route/vehicle consolidations etc.). STSCO annually prepares a Transportation Service Changes and Efficiency Measures report which is presented to the Governance Committee for approval in January. This approval paves the way for STSCO to communicate with affected schools and communities regarding the future plans. At the March/April Governance Committee meeting, a report on the outcome of proposal discussions with schools is provided. STSCO does not currently translate these activities into a medium or long term financial forecasting.

2.4.2.9 Information management

STSCO has developed a governance approved policy related to the use of confidential information. In the event that there is a privacy breach or a suspected breach is reported, STSCO will exercise the steps and procedures outlined in the KPR "Privacy Breach Protocol". All STSCO staff are required to sign confidentiality agreements.

The Consortium also has a governance approved records management policy which states that administrative procedures will be maintained to facilitate the retention, storage and destruction of records in accordance with all legal, fiscal, administrative and historical requirements of STSCO. The CAO is responsible for maintaining and annually reviewing the Records Retention Schedule for all records.

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:

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.

Key Performance Indicators

The Consortium makes extensive use of available data in both the course of the annual transportation planning process and 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.

The Consortium has used the tracked KPIs to develop decision trees, which are graphical representations of the KPIs for each Operator or Member Board, and a summary graphical representation of the KPIs over a period of time. The use of decision trees is an excellent analysis tool.

Information management

The Consortium has developed governance approved policies related to the use of confidential information and has confidentiality agreements between each staff member and the Member Boards in place, that help to ensure the confidentiality of all information. In addition, these policies also require the CAO, on an annual basis, to review and reflect on freedom of information and privacy legislation requirements, in relation to the retention and destruction of records.

2.4.4 Opportunities for improvement

2.4.4.1 Services purchased from STSCO

We recommend that STSCO continue to pursue the formalization of their agreement with the Hiawatha First Nations, which clearly outlines the scope of services and fees and their mutual obligations.

2.4.4.2 Support services provided by Member Boards

It is noted that the Member Boards have mutually decided that services provided by each to STSCO are comparable, and therefore, no charges are to be levied back and forth. However, the Member Boards are still encouraged to capture all costs associated with transportation in their reporting.

This portion of the cost sharing mechanism for the Boards should be reviewed annually to ensure that each Board continues to be treated fairly and that each is only paying for its share of administrative costs.

2.4.4.3 Insurance

It is recommended that the governance agreement be updated to reflect that the Consortium will purchase its own insurance.

2.4.4.4 Staff performance evaluation, monitoring and training process

We recommend that the Governance Committee continue to pursue the implementation of a process for the evaluation of the CAO.

We also encourage the Consortium to commence the staff evaluation process that has been planned.

2.4.4.5 Succession planning

It is recommended that the Consortium develop a formal succession plan to ensure the continued smooth operation of the Consortium should the CAO or other staff members leave or be absent from the Consortium. The succession plan should draw on the lessons learned by the Consortium from the high turnover that has been experienced.

2.4.4.6 Strategic planning

The strategic planning process is repeated on an annual basis and outlines the strategic initiatives of the Consortium for the upcoming year. 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. The Consortium's planning process allows it to remain focused on goal-oriented initiatives aimed at improving service levels, operational procedures and accountability frameworks. However, it is recommended that the Consortium take planning one step further and for each goal/activity ensure there are resources assigned and specific due dates and interim milestone dates established to ensure accountability and progress tracking on each i.e. the strategic plan should be operationalized.

2.4.4.7 Key Performance Indicators

We encourage the Consortium to make KPIs more accessible to planning staff, to more formally use this data in the management of contracts and to use this data more extensively in stakeholder and annual reporting.

2.4.4.8 Discuss job rotation of Consortium staff with collective bargaining units

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

2.4.4.9 Financial Forecasting

It is recommended that the Consortium incorporate a strategy for the management of transportation costs into its long term planning process. Developing such a plan will provide the Consortium with a framework that will help it address not only the issue of funding, but will also signal a proactive approach to dealing with issues before they arise. The Consortium is already undertaking some of the preliminary activities that would inform a long term forecast. These activities will now need to be translated into a financial forecast.

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 Original recommendations

Revenue/Expenses from Service Purchasing Boards

STSCO should review its approach to the allocation of administrative fees recovered from service purchasing boards. Currently, KPR accounts for all administrative fees and related expenses from Service Purchasing Boards. The majority of fees are collected from CSDCCS who will become a full Member by the end of the year, in which case the potential fees would not be material. As with the previous recommendation on overhead cost allocations, a proactive review of this process should be conducted to ensure that inequities between Member Boards are mitigated. Assuming some level of administrative assistance is provided by each Board, allocating recovered administrative fees and costs amongst Member Boards promotes fairness and equity between Boards.

2.5.2 Incremental progress

2.5.2.1 Accountability

The CAO has access to the accounting software and reviews the Consortium financials. Monthly budget to actual reconciliations are done where KPR's policy is to flag variances of 10% and above, in which case KPR follows up with the CAO for explanations.

2.5.2.2 Audit

KPR has an external auditor who undertakes specific procedures on the transportation accounts. The Member Boards rely on this audit for their individual transportation financial audits.

2.6 Results of E&E Review

This Consortium has been assessed as **Moderate-High**. The Consortium has not addressed many of the recommendations made in the original review and has not undertaken actions to keep up with best practices in the sector. STSCO still has many significant recommendations for improvement in Consortium Management including:

- Aligning the documented role of the Governance Committee with day-to-day practice;
- Instituting a performance appraisal policy and process for the CAO;
- Establishment of a Separate Legal Entity;
- Ensuring detailed job descriptions are available for all positions;
- Ensuring services purchased from STSCO are detailed in executed contracts;
- Ensuring support services provided by Member Boards are provided at fair compensation to help ensure the longevity of the member board consortium arrangement by avoiding disputes over unfair cost sharing;
- Ensuring all documentation reflects current consortium practice, especially as it pertains to insurance coverage and the review and adequacy thereof;
- Staff performance evaluation, monitoring and training processes;
- Succession planning and ensuring the consistent and stable staffing for consortium operations;
- Strategic planning; and
- The collection, communication and reporting of accurate and reflective Key Performance Indicators; and Financial Forecasting.

3 Policies and Practices

3.1 Introduction

The policies and practices section of the E&E Review examined and evaluated the established policies, operational procedures, and documented daily practices that in combination establish the standards of student transportation services. The analysis for this area focused on the following three key areas:

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

A review of provided documents, the analysis of extracted data, and onsite interviews with key staff members provided the basis for the observations, findings, and recommendations documented in this section of the report. Best practices, as established by the E&E process and the original recommendations 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 Rating	Moderate - High
Policies & Practices – New E&E Rating	Moderate - High

3.2 Transportation Policies & Practices

The development of clear, concise, and enforceable policies, practices, and procedures are essential elements of an effective and efficient transportation system. Well defined and enforced policies establish the level of services that are to be provided while practices and procedures determine *how* services will be delivered within the constraints of each policy. The harmonization of policies and 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 evaluated the established policies and practices and their impact on the effective and efficient operation of the Consortium.

3.2.3 Original recommendations

Exceptional Circumstance Trips

STSCO provides service to a significant number of students through its courtesy and hazard area transportation policies. Management of these exceptional circumstances require particular vigilance to ensure that they do not adversely impact either the cost or availability of transportation to students who are eligible through established policy. In addition, the staff time required to incorporate these students on to existing bus runs may be better spent in developing and evaluating other alternative routing scenarios that may increase the overall effectiveness and efficiency of the routing scheme. STSCO should thoroughly evaluate the provision of these exceptional circumstance trips and determine if it is still necessary to continue to provide services to students who are otherwise ineligible for service.

Maximum Ride Times

Addressing issues of ride times is often highly or wholly dependent on the location of one or two groups of students within a vast geographic service area. STSCO's Route Planners already make efforts to ensure that runs are within policy guidelines wherever feasible. The policy and practice should be reviewed to ensure that all routing scheme options, including the use of transfer, relay, and combination runs, have been considered to narrow any existing gap between policy and practice. Given that STSCO has no influence over where students reside it is possible that few if any additional alternatives are available,

however, continued vigilance on the part of Route Planners to address this concern should be encouraged.

Fleet Age

Finally, STSCO has recognized in both its policy statements and its contractual requirements that vehicle age is an important component of vehicle safety. Both policy and contracts require that buses not be older than 12 years. There are provisions in place to provide for temporary use of a spare vehicle that is up to 15 years old. However, current practice has allowed Operators to regularly operate vehicles that are older than 12 years, although a program has been established to ensure that all active vehicles are no older than 12 years by 2009. While this is ultimately a contractual issue (See Section 6.4.1) that is being addressed by STSCO, knowingly allowing violations of policy should not be permitted for any length of time and any violation should result in consequences for the violation.

STSCO should use all available mechanisms to encourage compliance with existing contractual requirements regarding fleet age. Allowing Operators to knowingly violate existing contract clauses could present significant legal liabilities should one of these old vehicles have an accident or safety issue. Recent efforts undertaken on the advice of counsel following the observations of the review are appropriate, but enforcement or revision to the contract clause is preferable.

3.2.4 Incremental progress

3.2.4.1 Exceptional Circumstance Trips

Space Availability Busing: STSCO has documented an internal procedure for the consideration of courtesy or space available transportation. To support an effective planning process, the consideration of space available transportation is independent of the planning process with approval granted only after all eligible students have been assigned. The procedure considers both the size of bus and the weighted loading factor. A prioritization system has been developed based on consideration of the following:

1. Medical related requests;
2. Baby Sitter or joint custody;
3. Specialized programs that permit space availability;
4. Out of Boundary requests; and
5. All other general requests for service.

The analysis of data indicates that of approximately 25,200 transported students 1,250 or almost five percent receive service on a space available basis. Further examination of the data finds a similar percentage of students are approved for each board indicating an equitable application of the policy. Approximately 852 out of 16,884 KPR students (5.05 percent) and 392 out of 8,000 PVNC students (4.9 percent) are provided with space available transportation.

The STSCO procedure is consistent with both KPR and PVNC Administrative rules stating that only existing routes and stops are to be utilized for space available service unless an alternate location is requested by the Board(s) as an exception. Both of the individual Board procedures further state that no additional costs will be incurred. The analysis of data under this criteria finds that out of approximately 6,404 stops reviewed that 67 or 1.05 percent of the stops are for students approved for space available seating with no other eligible riders assigned to the stop.

While the creation of additional stops for otherwise ineligible students can place both cost and service burdens on the system, STSCO has implemented a comprehensive process to monitor and review the necessity for additional or separate stops. As a request is received for a special stop to be added, the stop location and the reasons for a separate stop are documented in STSCO's Case File system. The case file number is recorded for reference within the MapNet routing software. Exceptions are reviewed regularly under the comprehensive Route Verification Process to ensure that the reason for the exception remains valid. This is an excellent procedure that supports a high level of service but also ensures that the impact of the services that are provided are managed and monitored.

Hazard Area Transportation: STSCO has developed an administrative procedure that describes the types of hazards that will be considered including: infrastructure, lack of crossing guards, lack of signalized crossings, and road conditions. The process for determining whether an area qualifies for transportation includes the use of STSCO-developed bus stop, turnaround, and railway crossing assessment tools.

Identical language within KPR’s and PVNC’s administrative procedures supports hazard based transportation stating that “Transportation may be provided within the defined walking distance as set out in Section 3.1(PVNC) and Section 1.1 (KPR), Eligibility Distances for Transportation”. Approval may be granted pending the details of the request and the findings of STSCO. Interviews with staff indicate that “most” hazard areas are “historic” but that new areas are evaluated using the tools as described above. Based on the analysis of data, approximately 712 or 4.2 percent of KPR students and 218 or 2.7 percent of PVNC students are transported from areas with identified hazards.

As a component of the STSCO’s Monthly Cycle Plan, all hazard areas are reviewed in December and March of each year. This timing of the reviews were strategically determined to coincide with the Efficiency Report submitted to the Governance Committee in January of each year and to prepare for changes that impact planning for the following school year. Within MapNet, the eligibility zones have been adjusted to include any of the approved hazard areas. A future planned enhancement is to post each of the hazard areas separately within MapNet to more readily identify which areas are receiving transportation based on the presence of hazardous conditions.

The practices and procedures that have been implemented to manage the approval, implementation, and tracking of exceptional circumstance trips including extra seat and hazard area transportation are comprehensive and equitably applied to each of the Member Boards. This includes ensuring that the granting of space available transportation does not influence the annual planning process and that hazard areas are regularly reviewed and evaluated. These processes meet the expectations of the original recommendations. However, the volume of space-available service or trips provided to otherwise ineligible students remains as a significant proportion of total service.

3.2.4.2 Maximum Ride Times

The amount of time consumed transporting a student to and from school is a key indicator of the service level provided. Ride time parameters are fully harmonized between the Member Boards which supports effective and efficient planning and equitable service delivery across the system. Ride time parameters have been established as follows:

Table 3: Ride Time Parameters by Grade Level

Grade Level	Ride Time Parameter
Junior Kindergarten to Grade 6	60 Minutes
Grades 7and 8	90 Minutes
Secondary	90 Minutes

While ride times have been harmonized between each of the Board policies, STSCO is not the single point of reference for this or other transportation policies, practices, and procedures. While this was not indicated as a shortcoming in the original review, having a single point of reference has emerged as a best practice. The original review on STSCO was the first completed, and many standards have evolved with the sector’s overall adoption of best practices over the intervening years. As an example, while the harmonized ride time policies provide the required guidance for planning, PVNC’s general guideline summary as posted on its website is inconsistent with its adopted policy statement. The guideline states that “except in special circumstances and where feasible, every reasonable effort will be made to limit the time on a bus to 60 minutes” compared to the actual planning parameter of 90 minutes for secondary and grades seven and eight students as described above. Having a single point of reference, preferably a stand-alone STSCO policy would greatly limit the likelihood of similar inconsistencies and provide for a more understandable and readily accessible point of reference for system users.

An analysis of student ride time data indicates that the level of service provided across the system and to each Board is well within defined parameters with average system-wide ride times for the morning and afternoon panels at 0:36 minutes and 0:28 minutes, respectively. Further examination finds a similar consistency at the Board level with ride time averages of 0:36 minutes for KPR in the morning and 0:29 minutes in the afternoon compared to 0:36 minutes in the morning and 0:28 minutes in the afternoon for PVNC. Ride times will be discussed in greater detail in the *Routing and Technology Section*.

The harmonization of ride time parameters supports effective planning and helps to ensure that services are provided equitably to each of the Boards. The analysis of data indicates that the parameters are equally applied and that a high level of service is being provided. The planning process and the management of ride times meet the expectations of the original recommendation, although additional adoption of sector best practices in the five years since the original review is lacking.

3.2.5 Accomplishments

Route verification process

STSCO's comprehensive *Route Verification Process* further ensures that routes are planned within the parameters established by STSCO and its Member Boards. All routes are required to be reviewed on an annual basis against key parameters including route lengths, efficient route paths, and safety parameters. The process is implemented consistently within the organization ensuring that planning is standardized across the system. This process represents a new best practice as it is an excellent example of a planning process that is effective, efficient, and promotes continuous improvement.

3.2.6 Opportunities for improvement

3.2.6.1 Establish STSCO as the single point of reference for all transportation policies and practices

While it is noted that the discrepancy in posted ride time standards does not impact STSCO's ability to effectively plan, establishing STSCO as the sole point of reference for all operational parameters would eliminate the opportunity for this type of documentary inconsistency, would meet an established best practice of the E&E process, and a common characteristic of a highly rated transportation consortia.

3.3 Route Planning

Effective and efficient route planning is a fundamental and key element of a high performing transportation operation. Within the level of service parameters established by policy, such as ride time guidelines and seat loading criteria, multiple strategies are necessary to ensure that a high level of asset and capacity utilization is achieved. The key and fundamental strategy that promotes the most effective and efficient routing network is the strategic setting of bell times. The active management of bell times, within the criteria established by policy, ensures that each vehicle is used as many times as possible throughout the day (asset utilization) and that the available seating capacity is filled to the highest degree possible (capacity utilization).

3.3.3 Original recommendation

Bell times

Review of existing routes and schedules indicate an opportunity to realize efficiencies through structural changes to bell times. STSCO staff should develop an array of alternative bell time scenarios designed to improve the overall ratio of tiered routes. While the current array of combination routes helps to mitigate inefficiencies inherent in a one tier system, the greatest opportunity for future cost savings is increasing the ratio of buses that are utilized across multiple tiers. Given that much of the administrative and organizational redesign efforts have been completed, redesign of the bell schedule and route network must be the critical element of focus. Capabilities exist within the Trapeze system to assist in this redesign.

3.3.4 Incremental progress

3.3.4.1 Bell times

STSCO has developed an administrative procedure for the annual review of bell times and the process for recommending changes in the bell time structure. The process is supported by each of the Member Board's individual policy statements which recognize the necessity of the strategic management of bell times. Working in consultation with each of the Member Boards, key planning parameters were prioritized as follows:

1. The primary planning strategy is based on dedicated bus runs to one school with an "emphasis" on buses performing multiple runs when possible.
2. The secondary strategy involves the sharing of a bus run between two or more schools with students from each of the schools riding together at the same time. This strategy considers the geographical proximity of each of the schools and the population density of students.

A bell time range and length of the educational day for elementary and secondary schools was also established to provide route planners with a range of times that can be considered during the planning process. Additional planning parameters include the establishment of a 15 minute arrival and departure window and the consideration of the impact on walking students, staff, and the ride times for students attending regional programs.

Each of the Route Planners are responsible for the improvement of route and run efficiencies including the identification of tiering or combination runs within their area of responsibility under the coordination of the Route Supervisors. Senior STSCO management is responsible for presenting proposed changes in bell times to the Administrative and Governance teams. Interviews with staff and provided data indicate that multiple bell time change proposals have been submitted by STSCO for consideration for approval by its Governance Committee and Member Boards.

The analysis of data for the original E & E found 142 afternoon bus runs of between 10 and 40 minutes in length, which is indicative of a possibility for pairing. Of these, only 14 (10 percent) were paired with other runs whereby multiple runs were performed as part of the overall afternoon bus route. This analysis led to the conclusion and recommendation that opportunities for additional run pairing may exist through the strategic management of bell times. Based on a similar analysis of current route data, 278 afternoon trips of between 10 and 40 minutes were identified with 42 (18 percent) paired to other runs. This analysis was conducted for runs serviced by buses with capacity greater than 40 passengers and with run lengths of between 10 to 40 minutes. The results reflect an increase of eight percent in the proportion of run pairings for a similar dataset analyzed in the original review. Further analysis finds that out of the 278 total bus routes (trips), 98 or over 35 percent serve 2 or more schools. This is consistent with the findings from the original study. While these results indicate that an effort to better align bells times has resulted in improved asset utilization compared to the original E&E, it appears that opportunities remain for increasing efficiencies. However, it is also clear that STSCO management has been actively analyzing and presenting these opportunities to Governance for decision, which is consistent with the intent of the recommendation and the E&E process. An overall analysis of the system effectiveness and resulting recommendations are presented in the Section 5.6.6 Analysis of System Effectiveness.

3.4 Safety Programs

The safety of transported students is a paramount goal for any school transportation system. Developing a culture of safety requires that transportation managers to work closely with students, schools, service providers, and the community to establish specialized programs targeted to the needs of each specific group. Additionally, driver training and student management procedures must be aligned to reinforce behaviour expectations and consequences for failure to comply with established policies and expectations.

3.4.1 Original recommendations

The Consortium did not have any recommendations in this area in the original E&E Review completed in April 2007.

3.4.2 Incremental progress

While there were no recommendations originating from the original E&E review for this section, the Consortium's efforts in this area since the original E&E include the following programs and initiatives.

3.4.2.1 Training

The First Rider program is supported by the Consortium and its Member Boards for all Junior and Senior Kindergartners. The program is offered both in the fall and spring and at various locations across its service area to increase its availability to all interested students and families. In coordination with the bus operators, STSCO also provides bus evacuation training (also in the fall and spring), to elementary school students. Additionally, the Consortium uses the *Intertrain/Buster the Bus* program during its bus safety training provided for elementary students.

3.4.2.2 Safety review process

To ensure the safety of its stop locations and walking routes, STSCO's staff including Route Supervisors, the Operations Manager and its CAO have all been trained in the review and evaluation of these locations. Additionally, the Consortium cultivates relationships with its local municipalities and public safety offices and with the Ministry of Transportation to share information and to keep abreast of any changes in the road networks that may have an impact on student safety. This initiative meets the expectations of some of the best practices as identified during the E&E process.

3.4.2.3 Assessment tools

STSCO has developed a rather unique process for the evaluation and assessment of areas with potential safety concerns including stop location and change requests, the safety of railway crossings, and safe bus turnaround locations. As a staff member conducts an on-site review of a stop location or other area with a potential safety concern, staff are able to enter values based on established criteria into a STSCO developed program. Based on these common evaluation criteria, the program generates a score which is measured against a pre-determined threshold. This results in a program generated determination which ensures that all concerns are evaluated consistently across the service area. Once a determination is made, it is defensible as it is based on clearly objective criteria and not solely on the opinion of a staff member. The process was developed in conjunction with local public safety department and has been shared with other Consortia. This process, supported by the use of technology is a best practice and is also an excellent example for other Consortia to follow.

3.4.2.4 Code Red

Working in conjunction with its Member Boards, STSCO has developed a process that identifies students that may present a risk of harming themselves or others. The purpose of this process is to ensure that Route Planners and the Operators are fully aware of any concerns regarding a student that has been flagged and can take the appropriate measures to ensure both safety of the identified student and the other students being transported. The identification and monitoring of this group of students is supported by the use of the *MapNet* routing software. The flagging of this group of students within the software ensures that no Code Red student will be transported until it is deemed appropriate and that once transportation is granted, an appropriate level of monitoring can be implemented. This process is a new best practice and an excellent example for other Consortia to follow.

3.4.3 Accomplishments

Assessment Tool

STSCO's stop and location assessment tool and process ensures that all concerns are evaluated fairly and consistently across their service area. This process represents a new best practice as it is an excellent example of how the use of technology can support and promote safe, effective and efficient transportation.

Code Red process

The Code Red process is another example of how STSCO utilizes technology in support of its safety initiatives. The use of software ensures that students who may present a safety risk are identified in the route planning process and not assigned to transportation until the safety of all students can be maintained. This is also a new best practice and an excellent example to follow.

3.5 Special Needs and Specialized Programs

3.5.1 Original recommendation

Specialized Program Transportation

Specialized programs, by their nature, are unique in that they may serve a broad array of students from across, potentially, the entire area serviced by STSCO. To the extent that it is possible to establish specific boundary areas where multiple programs exist across the Boards, these boundaries should be re-evaluated on a regular basis to ensure that transportation services can be effectively provided and that

the possible integration of traditional home to school and specialized services are not limited by the location of the program.

3.5.2 Incremental progress

To facilitate effective planning across the system, STSCO has assigned the responsibility to a single Route Planner. Effective planning for special needs students is supported by a comprehensive set of special needs transportation procedures. The procedures clearly recognize the importance of integration where possible, including the assignment of students to a regular education bus. This includes the use of wheelchair lift equipped regular education buses when the needs of all students can be met. Interviews with the Special Route Planner and STSCO senior staff indicate that a high degree of cooperation exists between STSCO and the special needs staff for each of the Boards. Using a standard form, a review process is conducted that considers each student's individual physical or emotional needs and their ability to utilize regular education buses. If special needs transportation is required, further discussions are held to reduce the use of taxis whenever possible including multiple students assigned to small buses and the use of shuttles.

To support effective and efficient special needs planning, a process for the inclusion of STSCO in the discussion for program placement has been implemented. This includes providing STSCO with information on new programs to be located or potential program relocation prior to the establishment of the programs location. This allows STSCO to perform an analysis of the cost and service impacts of the location and to provide recommendations for alternative sites. A similar process is also conducted for summer school transportation. This process meets the intent of the original recommendation.

3.6 Results of the Follow-up E&E Review

Policies and Practices for STSCO have been rated as **Moderate-High**. It is evident from the results of this follow-up review that STSCO remains committed to being a high performing Consortium. This is especially true as evidenced by STSCO's Route Verification process that promotes effective, efficient, and equitable services to each of its Member Boards and its initiatives in the support of safe transportation. The stop assessment tool and the Code Red process are both best practices and provide excellent examples for other consortia to follow. For STSCO to attain a High rating STSCO should be established as the sole point of reference for all harmonized transportation policies and operational guidelines. While this was not identified as a specific recommendation in the original review, it has been clearly and publicly established over the years since the original review was completed and through the identification and evolution of best practices at other Consortia over that time period.

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, comparison to recommendations in the original E&E, and 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-High
Routing & Technology – New E&E Rating:	High

4.2 Software and Technology Setup and Use

Large and complex transportation organizations require the use of a modern routing and student data management systems 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 evaluates the acquisition, setup, installation, and management of transportation related software.

4.2.1 Original recommendations

Training

Training of Route Planners is the critical short and medium term challenge for STSCO. While it is clear that STSCO staff have a baseline understanding of system functionality, a greater level of skill and expertise will be required to identify and implement efficiencies in the future. This training is also necessary to permit the Route Supervisors the opportunity to function as supervisors and oversee, rather than perform, the technical aspects of route design and development. This key interaction, between senior STSCO management and operations personnel, is highly dependent on the Route Planners' ability to become effective users of all aspects of the transportation software.

While basic training on the tactical use of the system for issues like adding, removing, and changing stop locations has been provided more detailed training is required on the strategic use of the system to allow for the development of alternative routing scenarios that would allow for increases in efficiency and cost effectiveness. This training could be provided using a combination of vendors and in house staff. In addition the development of a regular in-service training schedule targeted to specific functional aspects of the system would ensure continued staff competency. This model was attempted once previously but the competing demands of establishing the joint operation resulted in the dropping of this approach.

System Backup Procedures

Ensuring data integrity and security is a key requirement for system management. Therefore, procedures must be in place to ensure a system or network failure can be remedied as quickly as possible and minimizes the disruption to the operation. System backup procedures should be re-evaluated though changes may not be necessary. While the current approach is generally acceptable, STSCO should consider the use of more frequent backups of database content to available storage media. This approach would ensure that any unique circumstances (e.g., multiple pickup and drop-off locations due to custody issues, multiple program assignments for special education students) that are not fully documented in the student record are not lost.

4.2.2 Incremental progress

4.2.2.1 Training

Discussions with the planners and managers indicate that a systematic approach to training has been implemented. This process is designed to ensure that staff has a procedural and technical understanding of the planning process. This process further ensures that staff are able work effectively within their area of responsibility and also that the results of their work (route planning and management) is both effective and efficient.

The orientation and training process includes:

- An orientation process that defines the responsibilities and expectations of the position;
- An overview of each Board's separate policies highlighting differences that must be considered during the planning process;
- An overview of STSCO processes and procedures; and
- An introduction to *MapNet* and other technology such as phone and email systems, and basic office productivity software.

Interviews indicate that a high level of support is available from all levels of management and from their peer group. This includes the "shadowing" of more senior employees (and supervisors) and an "open door" to supervisors.

Employee skills and proficiency with their position is tracked by the use of the STSCO Training Program Assessment Tool. As an employee progresses in their training and acquired skills, their competency is recorded and monitored.

Examples of procedures and documents that support the training process include:

- How to Make Route Times and Vias Accurate – Trapeze Power Point;
- STSCO Route Verification Process;
- Arrival and departure procedure;
- Transfer procedures;
- Creating new routes procedure; and
- Route modification procedure.

This process meets the expectation of the recommendation for ensuring that current employees are afforded with training opportunities to support a high level of proficiency within their job classification and that a systematic approach is in place for new employees.

4.2.2.2 System Backup Procedures

STSCO has enhanced its processes whereby data is backed-up on a regularly scheduled basis to ensure the continuity of service in the event of a system or network failure. This process includes the nightly and weekly back-up of *MapNet*, *MapNet Web*, and all STSCO databases to a separate internal hard drive and to an off-site hard drive located at KPR. To ensure the integrity of the backed-up day, a process has been implemented to verify the accuracy of the data each Monday. Manual back-up and data recovery processes have also been developed in the event of failure in the automated processes or the loss of data. The data recovery process is tested twice yearly during the course of reporting transportation data to the Boards.

To support disaster preparedness, KPR has been designated as the off-site operational center in the event of a disruption in the ability to operate at their current location. This process will be further enhanced by plans to run a bi-annual “mock disaster” test of the process. These enhancements meet the expectations of the original recommendation.

4.2.3 Accomplishments

Staff training

STSCO's strategic approach to training and its use of “assessment tools” to track the skill progression of new and senior staff is recognized as a new best practice, ensuring that each staff member is afforded training commensurate to their skills and abilities.

4.2.4 Additional observation

The dissemination of information

It was recognized during the original E&E review that STSCO had demonstrated a best practice in how the functionality of its routing software and related technologies were utilized to disseminate basic information to stakeholders. As noted, the use of technology minimizes the staff workload enabling staff to focus on the route planning process. Since the original E&E, STSCO has further enhanced its use of software including:

- The establishment of an online application process to address stop change requests, alternate address, space available or courtesy transportation, and route change recommendations from the operators;
- The creation of web portals utilizing the *MapNet Web* software providing ready access to route and run information to schools and operators, and the posting of various documents including transportation procedures, student and parent information and responsibilities, and general frequently asked questions; and
- The implementation of a monthly operator communique to maintain awareness on issues of safety, operational changes or improvements, and policy information.

While there were no recommendations in this specific area, it is noted that these enhancements are in keeping with the best practices that have evolved over the course of the E&E process and also an example of STSCO's and its Member Boards commitment to continuous improvement.

4.3 Digital Map and Student Database Management

For any electronic routing system to be fully effective, it must be supported not only by an accurate underlying map, but also by accurate student data. As noted during the original E&E, STSCO recognized the importance of an accurate map and student data by assigning the accountability for each of the elements to specific staff positions. Also noted was the process for inclusion of the drivers to validate map attributes and a useful and logical coding structure to support data analysis and reporting.

4.3.1 Original recommendation

Completeness of Data Entry

Improvements continue to be needed in the completeness of data entry at the school sites. While established transportation records are generally unaffected by limited missed data entry (particularly of the Township record) it does create a need to review and verify the record, thereby reducing the effectiveness of that position. Each Member Board continues to make efforts in this area (including the addition of limited drop down menus into the Trillium student database) and these efforts should continue. While it is unlikely that all of these issues will ever be completely "solved", controlling the magnitude of the disruption caused by incorrect student records will remain essential to the effective provision of service.

4.3.2 Incremental progress

Interviews with the Computer Systems Supervisor and the Data Analyst indicate that a concerted effort has been made to reduce the amount of incorrect or missing data and the impact on the Route Planners. These efforts include the development of training materials for secretaries in how to use *MapNet* and a process to work with each Board's IT department to correct inaccuracies in student information in either the Trillium or Maplewood databases.

As inaccuracies are found, such as incorrect nomenclature for a street name, the Data Analyst compiles a list which is forwarded to the Systems Supervisor. The Systems Supervisor sends a service request to the Board's IT or works with them directly to correct student information. The goal over a period of time is have a near perfect match between the databases. These processes fully meet the expectations of the original recommendation.

4.4 System Setup and Use

The goal of every organization that acquires transportation software is to use it to better manage the vehicles and students within their charge. Accomplishing this requires an understanding of the functionality of the software and how it can support the administration of existing operations and the evaluation of new and different approaches that may reduce cost or improve service. This aspect of the review was designed to evaluate staff competencies using the software, the use and understanding of ancillary modules or third party tools, and whether the functionality of the chosen application is used to improve effectiveness and/or efficiency.

4.4.1 Original recommendation

Training

As previously mentioned, training of Route Planners on the "higher order" use of system functionality is the critical element required for STSCO. This training will allow STSCO to more critically evaluate its performance and identify opportunities to reduce cost or improve the delivery of service without adversely impacting daily operations. Enhancing the strategic planning capabilities is the next evolutionary step required for STSCO operations.

4.4.2 Incremental progress

Once an employee has reached a core level of efficiency with the use of MapNet, additional training is provided to enhance the planner's ability to use the system. Upcoming training that is scheduled includes the process for empty seat transportation (out of boundary, alternate address, and babysitting) and optimization training (run pairing and tiering strategies) for newer employees. This process meets the expectation of the recommendation ensuring that a strategic training program is designed to support each employee and to ensure a common level of skills (over a period of time) between all of the planning staff.

4.5 System Reporting

Adequate reporting allows for the early identification of trends that may be detrimental to operations, improves the analytical capacity of the organization, and allows for internal and external stakeholders to be more adequately informed about operations. The purpose of this aspect of the review was to evaluate what reports are typically generated, who receives these reports, and what capabilities exist to develop ad hoc reports.

4.5.1 Original recommendations

Data Management

The process used to identify and remedy changes to student data is inefficient from the standpoint of prioritizing work. Currently, route planners review each change in student data brought in through the batch update process individually. This approach "weighs" each change to a student record equally despite the fact that some issues are much more important than others. STSCO should develop a daily report for Route Planners that assist in the prioritization of route changes. Through the use of a standard reporting mechanism that categorizes and prioritizes the changes associated with student records, STSCO could ensure that critical changes get addressed immediately (e.g., an address change that will result in a route change) while less important changes (e.g., missing Township data in the student record) are addressed when time permits.

Reporting Schedule

The lack of regular reporting limits opportunities to regularly validate and verify the completeness and accuracy of system data. In addition, regular reporting allows for the early identification of operational issues including: the impact of growth in specific areas, process improvements required for data entry, run lengths approaching policy maximums, and identification of excess system capacity. STSCO should evaluate each position in the organization to determine what data those individuals require, the schedule it is required on, and establish a proactive reporting schedule to reflect these requirements. These reports could include: a daily student change log for each route planner; a weekly route change report for Route

Supervisors; a quarterly performance operations report for the Operations Manager that provides summary statistics and detailed data on issues like capacity utilization, route pairing, average run times, and lateness; and an annual operational summary to the CAO that summarizes the key performance statistics mentioned above and incorporates detailed cost measures such as the direct and indirect cost per bus, cost per student, and cost per kilometre. This reporting structure could then be used to guide the scope of the annual efficiency reviews conducted within STSCO.

4.5.2 Incremental progress

4.5.2.1 Data Management

The Data Analyst is responsible for the uploading of the daily adds, changes, and deletes from each of the Boards. The Data Analyst reviews the information to ensure a match to the student information in MapNet before the information is forwarded to the Planners. This process reduces the amount of time that each planner would be required to correct data and also ensures that a student's assignment to a stop and bus is timely and accurate. STSCO is working with PVNC to enable an automated interface between the *Maplewood* and *MapNet* databases that will reduce the need for manual imports of data. This interface is expected to be functional for the start the 2013-14 school year and will result in the reduction in the amount of time required for data management processes and the potential for error. These enhancements will support the more efficient use of staff and will meet the expectations of the original recommendation, although have not been fully implemented as of the date of this follow-up review.

4.5.2.2 Reporting Schedule

STSCO has developed an array of key performance indicators (KPIs) that have become integrated into the daily management of the system. KPIs are used to measure and track both operational and service trends for reporting and for operator or organizational improvements. The process for measurement of each of the KPIs is thoroughly documented in a flow chart or matrix format. This includes the area that is being measured, the data required, and communication requirements, how the KPI will be analyzed and reported, the follow-up required, and the frequency. An achievable target and goal is established for each area to help support the philosophy of continuous improvement. While the current KPIs have been monitored ranging from over two years to over six years, the Consortium is continually examining what is being measured and may drop or add a KPI as trends and operational necessities change. Examples of the KPIs currently being measured include:

- Accidents – preventable and chargeable;
- MTO inspections;
- On-time delivery statistics;
- Operational “Top” Issues;
- Operator Reviews;
- Overall Operator Performance;
- Average ride times;
- Average walk to stop distances;
- Capacity utilization;
- Runs per bus; and
- Eligible students.

4.5.3 Opportunity for improvement

While overall the process for KPI measurement meets the expectation of the E&E process, the process must also consider how issues are to be resolved once a negative trend is noticed or identified. A prime example of this is the negative trend identified in the age of fleet as described in the *Policies and Practices Section*.

Interviews with technology staff also indicated that issues with how data is requested from the transportation consortium by schools or other stakeholders can lead to misinformation being provided to the requester and the need for additional data to be provided for clarification. A protocol for data requests may need to be considered to reduce the possibility of inaccurate reporting and the impact on staff time.

4.6 Regular and Special Needs Transportation Planning and Routing

Effective and efficient route planning is the key element of any high performing transportation operation. This portion of the review discusses the recommendation from the original E&E and the resulting incremental progress. Also discussed are the current findings regarding the overall effectiveness of the system.

4.6.1 Original recommendation

Use of Taxis

The extensive use of taxis presents two possible issues for STSCO. The first is that single occupant vehicles, as taxis frequently are, are a very expensive method of transport for students. Additionally, taxis are not required to have the same structural safety equipment (including the compartmentalization design and frame and structural requirements) as school vehicles, although seat belt use is required. These two elements make taxis an undesirable, although at times necessary, mode of transport.

STSCO should reconsider the extensive use of taxi services to provide transportation. STSCO currently uses over 130 cabs to provide transportation services. Many of these units are single occupant vehicles designated for students with behavioral difficulties. As part of the bell time analysis recommended above, STSCO should also reconsider the mode of transportation utilized for these students and determine if opportunities exist within the redesigned route network to reduce the dependency on single occupant vehicles.

4.6.2 Incremental progress

4.6.2.1 The Use of Taxis

Interviews indicate that special needs' planning has made a concerted effort to reduce the number of taxis or vehicles transporting a single student. Before a taxi is considered to provide transportation, a review of each student's specific needs is conducted to determine if the use of a taxi is necessary. This includes time and distance constraints based on the location of the program, program times, or if the student requires ride alone transportation. As noted in the *Policies and Practices Section*, a high degree of cooperation exists between STSCO and the special needs staff for each of the Boards. The process includes the use of a standard form and review process to reduce the use of taxis whenever possible, including the assignment of multiple students to small buses and the use of shuttles. Based on the analysis of fleet data, there are approximately 61 taxis currently in use. This represents a reduction of 53 percent. This is a positive indication of the effectiveness of the effort to reduce the use of taxis and also of the cooperation of the Boards in allowing STSCO to serve students in the most effective and efficient manner possible.

4.6.2.2 Analysis of system effectiveness

An overall analysis of system data was performed to obtain an understanding of the effectiveness of the routing network. One primary measure of system effectiveness, as measured by service quality is average student ride time. Other indicators of efficiency are Capacity and Asset Utilization. The goal of effective planning is to *fill* the bus to planned capacity and to *reuse* the bus as many times as possible throughout the day. Capacity utilization considers how many of the available seats are filled on each individual bus run while asset utilization considers how many runs per day each bus is able to perform. The primary constraints that must be considered when determining a routing strategy that optimizes these two objectives include population density, distance, and time. While distance and population density constraints cannot be altered, time constraints can be managed and mitigated by the strategic management of bell times. In the absence of strategically set bell times, or when constraints such as time and distance cannot be mitigated, the effective use of combination runs can be an effective strategy to achieve greater utilization of the fleet. This section will analyze how the system is currently performing and highlight areas where there may yet be opportunities for improvement.

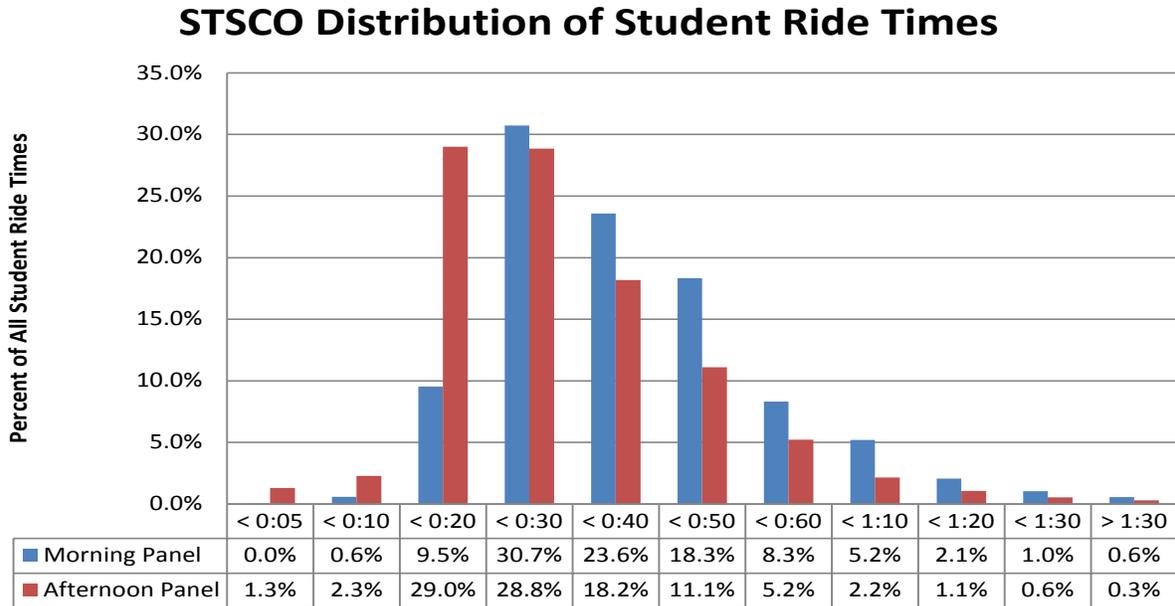
Student ride times: The amount of time that students spend being transported to or from school is a key indicator of the overall level of service provided by any transportation organization. As noted in the *Policy and Practices Section*, the analysis of ride times for all STSCO students finds that a high level of service is being provided across the system. The average morning ride time is approximately 36 minutes with almost 91 percent of all student ride times at 60 minutes or less and over 99 percent below the maximum planning parameter of 90 minutes. Similar results have been achieved in the afternoon with average ride

times of approximately 28 minutes with just over 96 percent at 60 minutes or less and almost 100 percent below 90 minutes.

The distribution of ride times is shown in the following chart:

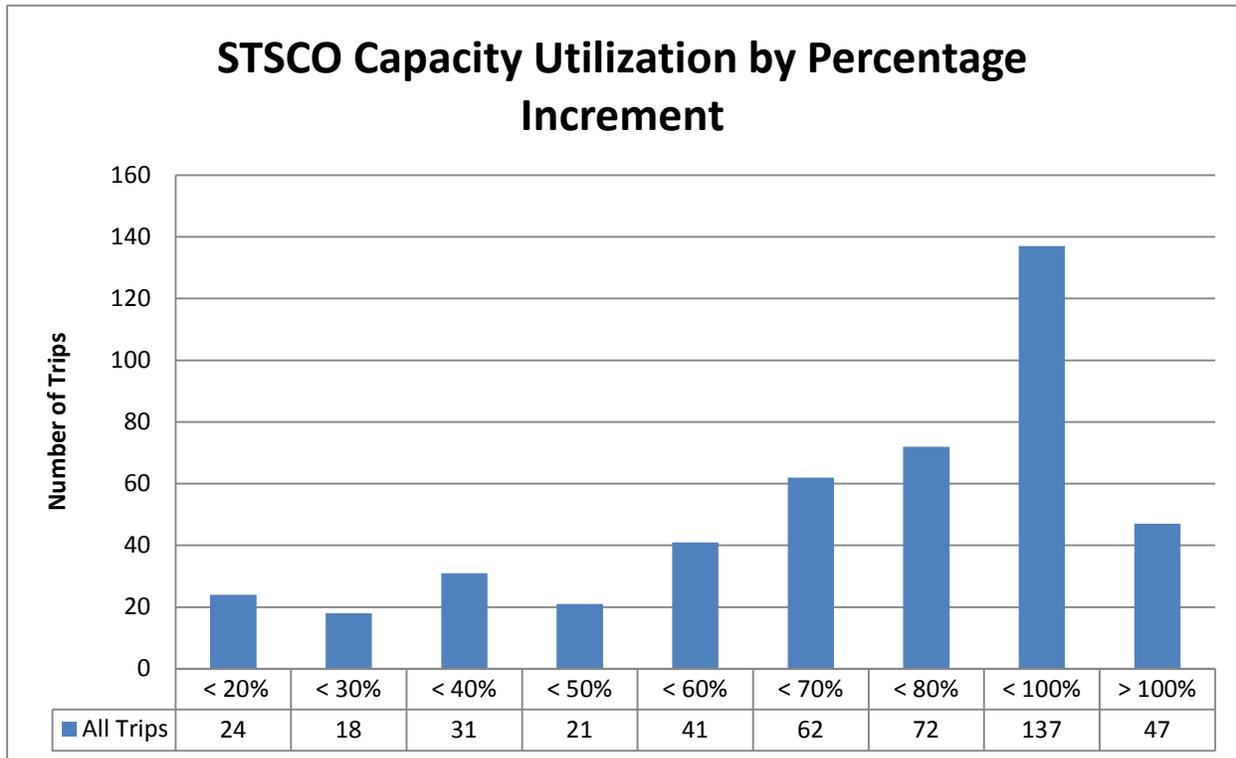
Figure 3: Student Ride Times

□



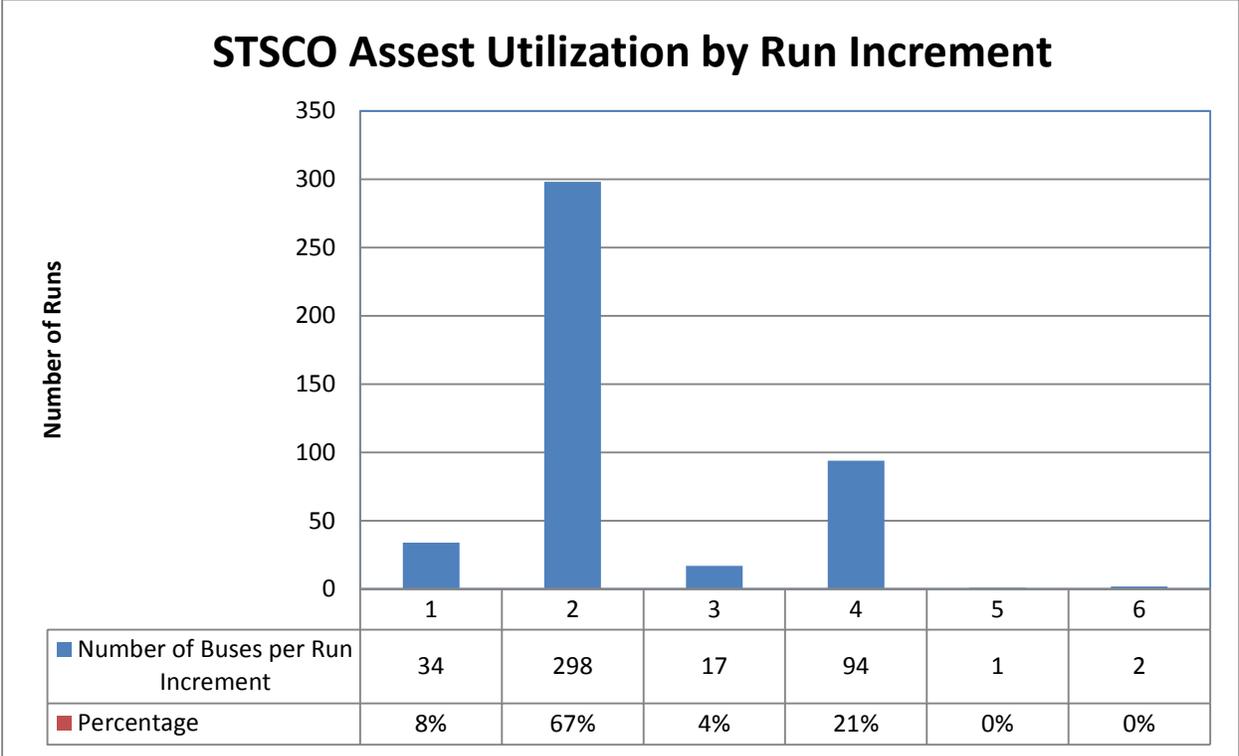
Capacity utilization: The analysis of data finds an average of 70 percent, on a planned basis, across the entire system for all vehicles with a capacity of 40 students or above. Planned capacity utilization reflects all eligible students and results in situations whereby some runs, such as those serving high schools, are planned to utilize more than 100 percent of capacity in recognition that not all eligible students will actually avail themselves of the service. This result is within an expected range and is indicative of an effectively planned system. Planned capacity utilization is illustrated in the following chart:

Figure 4: Capacity Utilization



Asset utilization: Of the 1,074 AM and PM runs served by 446 buses (24 passenger or larger), 298 or almost 67 percent of the buses are only assigned to a single AM and PM run. Only 22 percent or 97 buses are able to perform 4 or more runs throughout the day with an overall all average of 2.4 runs per bus. It is understood and noted that a large 9,800 square km area is served by STSCO, with challenges presented in routing around many natural features such as lakes and rivers. While these features present obstacles for direct route and run paths that may limit the -opportunities for run pairing, a system-wide consideration of bell time coordination may reveal additional -opportunities for bell time alignments and the further reduction in the number of buses. The current results are illustrated in the following chart:

Figure 5: Asset Utilization



Combination Runs

A secondary strategy to mitigate the low use of run pairing, and identified under the STSCO’s bell time management policy, is the sharing of a bus run between two or more schools. This strategy can be an effective tool in achieving greater capacity and fleet utilization in lieu of dedicated runs to a single school. The effectiveness of this strategy also relies on the strategic setting of bell times. To enable a bus to serve more than one school on a single run, there must be sufficient time between each of school’s start and end times to allow the bus to drop off students (or pick-up) at the first school and be able to travel to the second school. In either case, the total time of the run must be within ride time parameters and arrival and departure windows. Of the 1,074 runs 757 or approximately 70 percent serve a single school with 204 runs or 19 percent providing service to 2 schools with the remaining 113 runs serving 3 or more schools. The number of combination runs is illustrated in Figure 6.

Service is planned around a bell time range with a school start time as early as 8:15 AM and a dismissal as late as 3:50 PM. To support both an effective tiering and combination run strategy, the distribution of school start and ends times should be distributed as evenly as possible throughout the available range of time to enable as many combinations as possible. Based on the analysis of school bell times, bell times are staggered in a fairly even distribution with the exception of the early start and dismissal range of 8:15 AM to 2:15 PM. An increase in the number of schools that start early may present an opportunity for additional tiering and combination runs. School arrival and departure distribution is illustrated in Figure 7.

Figure 6: Combination Runs

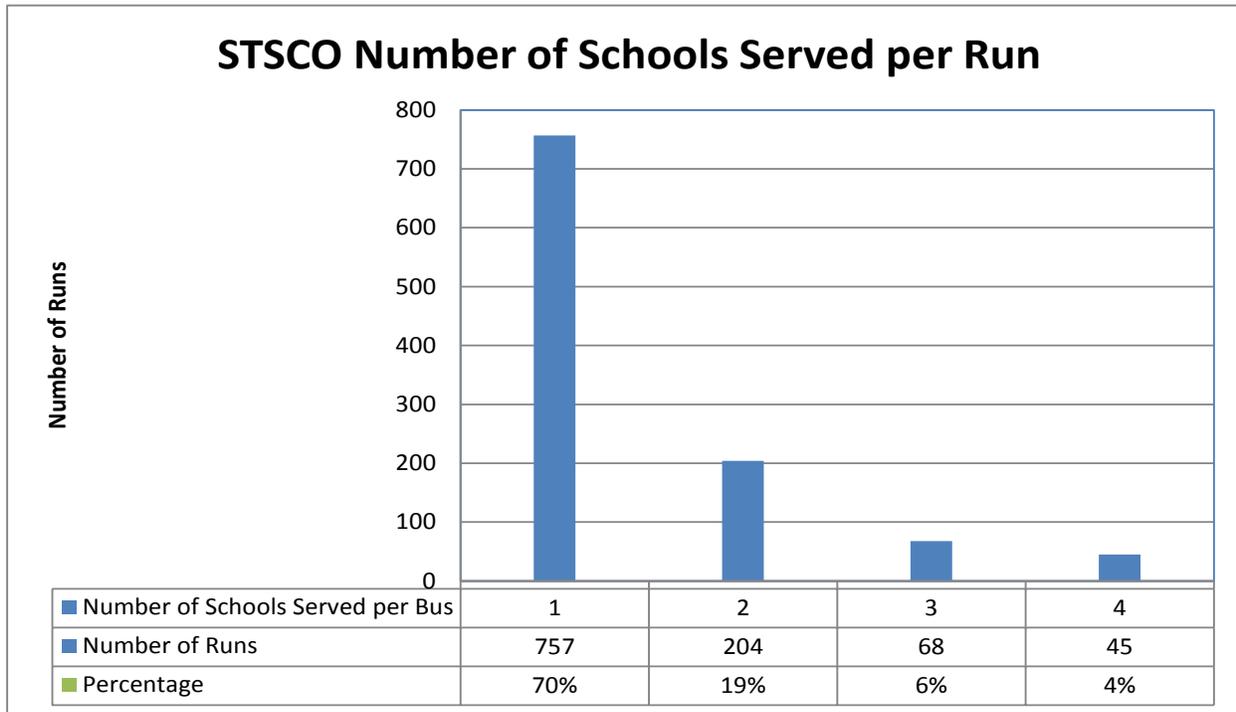
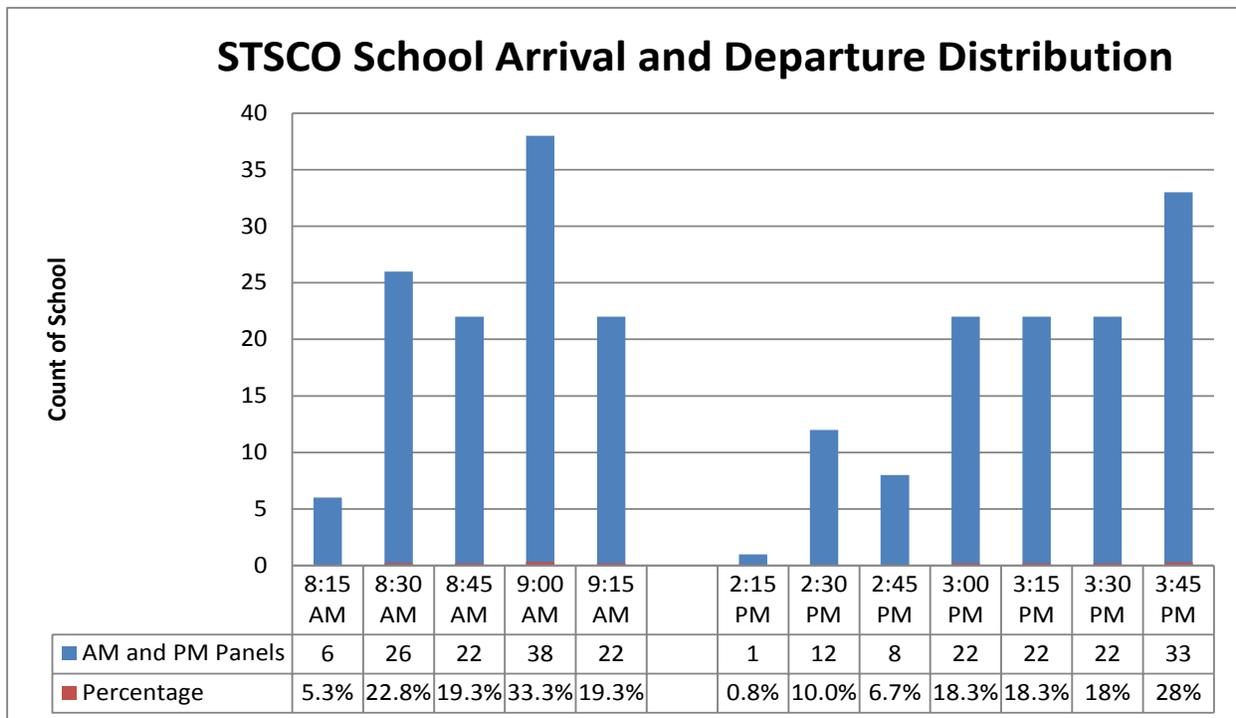


Figure 7: Bell Times – Arrival and Departure Distribution



4.6.3 Opportunities for improvement

4.6.3.1 Aggressively evaluate additional tiering and combination opportunities across the system

The strategic management of bell times to support the multiple use of fleet assets continues to present the greatest opportunity for increasing the effectiveness of the system and to further reduce and control

costs. While it is acknowledged that STSCO and its Member Boards have invested a great deal of effort to improve the alignment of bell times, which has resulted in a positive impact on the utilization of the fleet, a more comprehensive and systemic approach may be necessary to fully understand the true potential for better fleet utilization across the system. This may require a comprehensive bell time study across the system and the development of incremental plan for implementation.

4.7 Results of the follow-up E&E review

Routing and Technology for STSCO has been rated as **High**. STSCO has made great strides particularly in the areas of staff training and in its efforts to correct the data provided by its Member Boards. These efforts in conjunction with the assignment of data management to the technical staff fully support the intent of the E&E process by ensuring that staff has accurate data for planning and management and the skills and abilities to perform their duties both effectively and efficiently. Enhancements to its previously recognized best practice in the use of software to disseminate basic information to stakeholders to include online application processes and the creation of web portals are consistent with the best practices that have evolved over the course of the E&E process and provide evidence of STSCO's commitment to continuous improvement.

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:	Moderate-High
Contracts – New E&E Rating:	Moderate-High

5.2 Contract Structure

An effective contract³ 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.

5.2.1 Original recommendations

Compensation

The existing contract structure provides for Operator compensation when services are not rendered, specifically for snow days and other school closure events. While incorporating some protection for Operators, particularly in capital intensive businesses such as school bus operations is considered reasonable, it is unreasonable to expect full payment for both fixed and variable expenses on days when service are not rendered. Therefore, STSCO should review the standard contract clauses and revise the compensation clause to, at a minimum, eliminate the payment of the variable portion of the fee when services are not rendered.

Additionally, the contracts with taxi companies should also be revised to eliminate the need for payment when services are not rendered. Taxi companies operating under old contracts (i.e. contracts held when Boards managed their own transportation services) have their contracts renewed annually and include a provision that the drivers are paid the per diem rate for a set number of school days regardless of actual

³ The word Contract in this context refers to detailed documents outlining the scope of services, rates and expected service levels. The phrase Purchase of Service agreement is used in this report to describe a less detailed document that only outlines the services to be provided and the rates at which they are to be provided.

service provided. When not in use for school transportation, taxis can and will operate elsewhere thereby minimizing the financial impact of any lost days from school closures.

STSCO should also reconsider, though no actual changes may be required, the current two tier rate structure. Contracts with Operators are currently structured such that only a 72 and 20 passenger vehicle rates are negotiated when in fact, vehicle sizes being used could range anywhere in between based on loading. This could mean that STSCO is paying a higher rate than the vehicle actually being used. STSCO should review the capital and operating costs associated with alternative sized vehicles. If a material difference is found between the cost of larger and smaller vehicles, STSCO should consider the establishment of an additional tier in its Rate Formula to reflect these costs.

5.2.2 Incremental progress

5.2.2.1 Bus Operator compensation

Payments for services provided by the Operator are calculated on the basis of 188 school days. STSCO now has a payment formula (“the Transportation Formula”), which it applies to all Operators. The Formula consists of:

- A fixed rate, which is a per diem amount payable to the Operator for each route covered by the Operator.
- A variable rate, which is a per kilometer amount payable for each route covered by the Operator and includes a fuel escalator. The fuel escalator is set at the Ministry of Education pegged amount, and calculated monthly after the release of the Ministry’s fuel fluctuation percentages.

During the previous E&E review, it was noted that Operators were paid fully on inclement weather days and other school closure events. Although they are no longer paid in full during these occurrences, they are still paid. For disruptions due to inclement weather less than five school days, the Operators receive both the fixed rate and variable rate in full. For disruptions more than five school days during the term, Operators receive the fixed rate and variable rate less the fuel portion of the variable rate for the sixth day of cancellation and any additional days of cancellation thereafter. In both scenarios, the disruptions do not have to be consecutive and are cumulative over the year.

For school closures such as strikes and lock-outs that last for more than five (5) business days, Operators are paid various daily rates from the sixth day of cancellation. These daily rates are in order of decreasing percentages of the per diem as the number of service cancellation days increase. If the school closure is less than five (5) business days, the Operators are paid in full (fixed rate and variable rate in full).

5.2.3 Opportunities for improvement

5.2.3.1 Inclement weather compensation for operators

In cases where inclement weather prevents the buses from safely operating, or there is a school closure as a result of inclement weather, it is recommended that only fixed cost should be paid to the Operators to compensate for their effort to ensure the fleet of buses are ready to resume duty when the inclement weather passes by. Variable costs such as per kilometre costs that are not incurred should not be paid by the Consortium.

5.3 Goods and Services Procurement

Procurement processes are intended to provide an avenue through 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

Negotiation Process

STSCO negotiates its bus operator contracts with the BOA. Under this process, it cannot be known whether STSCO is getting the best value or market rates. The use of a Rate Formula and negotiated settlement on allocations with the BOA does not allow for an equal delivery of service or incentives for improvement to services by Operators. This is because all Operators are being paid the same regardless of the quality of the service they provide and the investments made to provide that level of service. Therefore, STSCO should establish a competitive contracting process that defines service expectations exclusive of specific Operator allocation requirements. Operators could then bid on the contracts based

on their ability to provide the desired level of service and at the required cost. It is recognized that this does not necessarily mean that the cost will decrease, in fact, the cost may increase depending on the specifications within the contract. The advantage however is that STSCO can be sure they are receiving the best value for money and Operators can ensure they are receiving fair pay for the quality of service they provide.

It is recommended that, in order to ensure that market prices are being charged by Operators, a competitive contracting process be used for awarding contracts. It is also recommended that STSCO determine the optimal number of operators they wish to enter into contracts with, setting criteria such as no operator shall have more than 30% of the routes and there will be no more than 10 Operators will ensure that there are enough Operators to ensure competitive rates and the administrative burden on staff at STSCO is minimized (e.g. monitoring Operators, processing invoices, etc.)

Parent Paid Drivers

Management of alternative service providers requires that STSCO minimize its potential exposure in the event of an accident or mishap related to the transport of a student. The use of a parent pay model should include a review by legal counsel to ensure that the lack of any contractual mechanism to manage the students transported in parental vehicles does not create any additional exposure to STSCO.

5.3.2 Incremental progress

5.3.2.1 Operator procurement

STSCO no longer negotiates its bus operator contracts with the Bus Operators Association (BOA), which it did during the previous E&E review. It now directly negotiates with the Operators annually. Rates are agreed based on issues such as inflation.

The Consortium has not implemented a competitive procurement process for any of its core transportation services. STSCO indicated that it issued a Request for Proposals (RFP) in November 2012, which was scheduled to close in December 2012. However, due to pending legal challenges for some other Consortia that issued RFPs parallel to STSCO, the procurement has been suspended. Competitive procurement will proceed once the court decision is determined. With the lack of a competitive procurement process for selecting Operators, route allocations are “evergreen”, which means that they remain the same for contracted Operators year after year.

STSCO has previously completed a Request for Tender (RFT) for Taxi Services to support the transportation of special needs students in the Peterborough area. The Consortium believes they can repeat this for the coming year.

The contracts were signed on 1st September, 2012, and they expire on the 30th of June, 2013.

5.3.2.2 Parent drivers

STSCO continues to use parent drivers. These arrangements were made in consultation with School Board officials as the best and only way to transport the children involved to school. The parent drivers are required to have signed agreements with STSCO. They are paid Board agreed rates and are used mostly for students with special needs.

5.3.2.3 Transit Operators

The Consortium is currently considering the possible use of Transit Operators especially for the transportation of high school students. STSCO will decide based on their cost analysis if this will be a viable option to consider.

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:

Parent drivers

Contracts are signed with all parent drivers. The formalization of this type of arrangement through contracts and stipulated compliance requirements helps to limit the liability to the Consortium.

5.3.4 Opportunities for improvement

5.3.4.1 Contract procurement

The Consortium is encouraged to review their operator procurement practices to ensure they are in compliance with applicable legislation.

5.3.4.2 Transit Operators

It is recommended that STSCO continues to investigate the use of Transit Operators especially for the transportation of high school students. A cost-benefit analysis which should include a route optimization with and without the high school students should be undertaken to evaluate the real cost impact of using transit operators. In addition to the cost analysis, the Consortium should also fully consider the qualitative implications to safety and liability.

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 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 and requirements set out in the contract; and
- Performance monitoring to track the overall performance of operators over time.

5.4.1 Original recommendations

The Consortium did not have any recommendations in this area in the original E&E Review completed in April 2007.

5.4.2 Incremental progress

5.4.2.1 Operator compliance and performance management

The Consortium has a governance approved policy, framework and documentation in place that outlines the process to verify that Operators are meeting contract compliance and safety standards. This is achieved through the use of an Operator Performance Monitoring System (OPMS) developed by the Consortium.

The OPMS is comprised of seven pillars which have been identified as the key areas of performance requirements to ensure safe, effective and efficient services. These pillars, listed below, are weighed differently as part of the overall score (100%):

- **Contract compliance:** This makes up 30% of the overall score and measures the Operator's overall compliance with the Contract Agreement. Criteria measured include, but is not limited to First aid and CPR certification of all drivers, vehicle lists and possession of a valid insurance certificate.
- **Operator review:** This accounts for 20% of the overall score in the monitoring system and assesses safety, operational management, communication, training and document control of the operator.
- **MTO inspection:** This helps the Consortium monitor the condition of Operator vehicles, and is rated based on initial reporting of an inspection, a vehicle pass rate and an inspection report submission to STSCO. The MTO inspection is 15% of the overall OPMS score.
- **Route Audit:** The Consortium audits 10% of all the routes for each operator over the course of the school year, and chooses the timing of any route audit, as they occur at random and without notice. The route audits allow for the real-time evaluation of criteria including driver speed,

obeying traffic signs and safe student loading or unloading practices. STSCO does not have GPS technology on any of the buses which can help make these audits easier and efficient. The drivers also conduct one self audit a year. Route audits make up 15% of the overall OPMS score.

- **On Time delivery of service:** This pillar is based on timely service provided by the Operators on a daily basis, and accounts for 10% of the overall score.
- **Customer Service:** This measures the customer interaction between the operators (including drivers) and schools, parents and STSCO staff. It makes up 5% of the OPMS score. The Consortium surveys the schools and parents for feedback regarding drivers, using the STSCO website as an access portal.
- **Bus Evacuation Training:** This makes up 5% of the overall OPMS score and involves the Operator contacting school authorities to make arrangements for the bus evacuation training sessions. The Operator then informs STSCO once the training sessions are completed at each of the assigned schools.

STSCO provides a score for each of the seven OPMS pillars described above, and calculates the overall score. The standard score requirement is 80%. With this OPMS score, STSCO works with the Operators to develop an Action Plan report, which it issues to the various Operators to assist them in managing their drivers and improving overall service quality.

The Consortium stated that the average OPMS scores of the Operators have improved steadily and there has not been a case where a company has repeatedly failed to meet the 80% score threshold on an annual basis. They maintain that if this should occur and there is desire to terminate the company's contract, then they would do so in accordance with Section E., "Termination of Agreement", of the Contract.

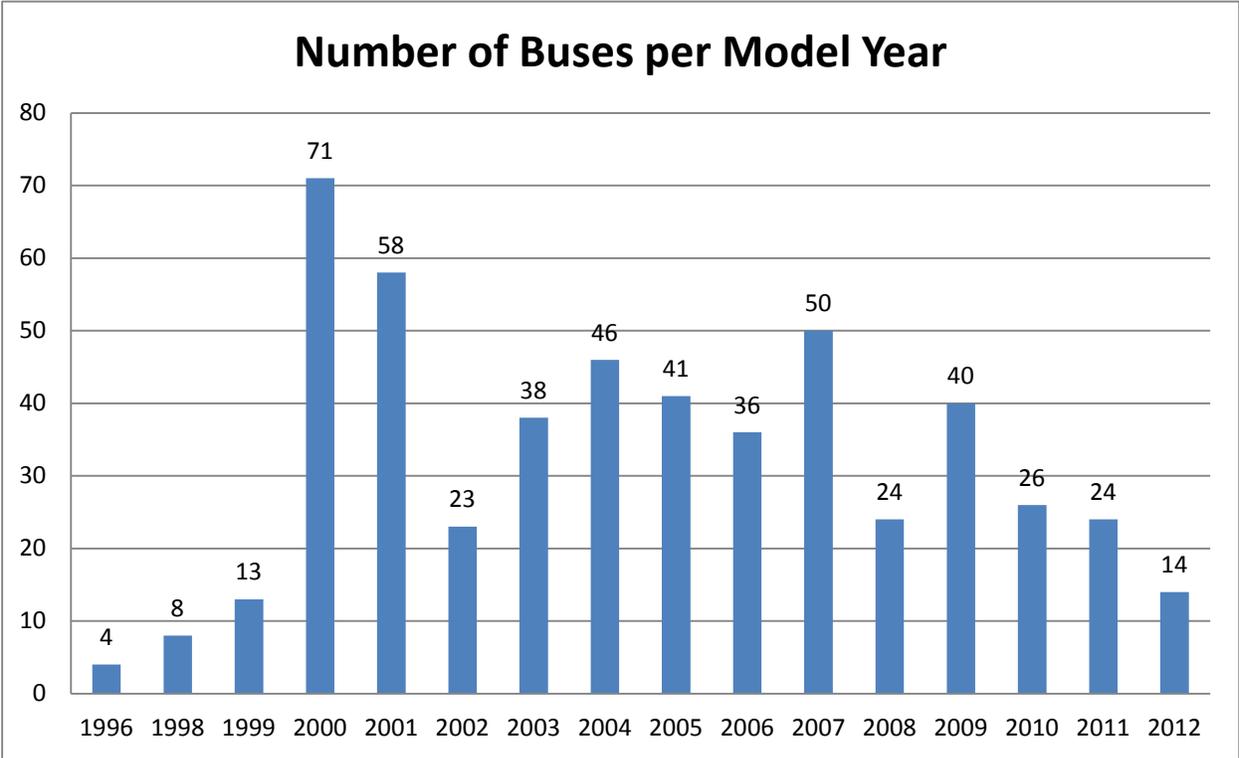
However, although the standard score requirement for OPMS is 80%, there are no specific rules, guidelines or contract clauses regarding penalties for an Operator that consistently falls below the 80% mark.

5.4.2.2 Fleet Age

Maintaining a fleet within age limits as established by policy or contract supports effective service by reducing the potential for mechanical failure and ensures that buses have the most recent safety, comfort, and emissions equipment. The STSCO operator contract states that all vehicles providing services under their agreement with the Boards shall be no more than twelve years of age unless otherwise approved as an exception by the Boards. The contract further states that for the 2012-13 school year that an operator may use a vehicle that is not more than thirteen years of age providing they have submitted a list of the "temporary" vehicles to be used during the school year prior to September 1, 2012.

Based on the analysis of current fleet data for 516 buses (small with wheel chairs and larger) the average age of the fleet is nearly 8.5 years with the oldest vehicle at 17 years of age. As illustrated in Chart 96 buses (18.6 percent) already exceed the 12 year age parameter in the current service year while 58 additional model year 2001 buses (11.2 percent) will be over the age limit during the 2013-14 school year.

Chart 1: Model Year Distribution of Buses



Based on the data provided and the resulting analysis, it appears that STSCO and its Member Boards are at a critical juncture in the management of its contracts, specifically as it relates to the age of the fleet. Unless there are planned strategies to mitigate the number of buses over the contractual age limit, by the end of the 2013/14 school year, 154 buses (30 percent of the fleet) will be over the contractual age limit.

Additionally, the maximum fleet age allowed for STSCO Operators is 12 years. There is also a contract clause that allows for the use of 13 year old vehicles specifically for spare usage. The Route Supervisor keeps a record of new vehicles purchased by Operators. The Consortium does not have any policy on what the average fleet age for the Operators should be.

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 monitoring

STSCO performs periodic audits of Operators and drivers to ensure they are in compliance with safety and legal requirements. Audits are a key component of contract management. They measure whether the Operators and drivers are complying with stated contract clauses and ultimately if they are providing safe and reliable service. The Consortium performs periodic route audits to ensure that on-road service quality matches the expectations set out in the operator contract. These are done on 10% of routes for each Operator.

The OPMS framework created by the Consortium is very detailed and is an excellent tool for contract monitoring.

School Surveys

The Consortium surveys the schools and parents for feedback regarding drivers, using the STSCO website as an access portal. This helps to rate the customer service provided by the Operators, drivers and the Consortium.

5.4.4 Opportunities for improvement

5.4.4.1 OPMS penalties

The Consortium should update their contracts to include specific penalties for Operators that consistently underperform. While we acknowledge that the Consortium has the ability to terminate a contract, the Consortium may benefit from having less severe mechanism for managing/motivating improved performance.

5.4.4.2 Ensure that the age of the fleet continues to meet contractual requirements

As noted during the original E&E, the CAO obtained signed documentation from each of the operators acknowledging the phasing in of the 12 year maximum vehicle age policy. However, sustained achievement of this objective appears to be threatened by an emergent deferred replacement backlog. Avoidance of a wholesale violation of policy requires an immediate review and deliberate plan to reduce the average age of the fleet and to ensure that the operators remain contractually compliant. Ensuring ongoing compliance with all contractual obligations is also an attribute of highly rated consortia.

5.5 Results of E&E Review

The process by which the Consortium negotiates, structures, and manages its contracts for transportation services has been assessed as **Moderate-High**. Positive elements include the execution of a detailed contract monitoring process (OPMS) to ensure the efficiency and reliability of the Operators. However, STSCO still needs to incorporate a penalties system into OPMS to ensure its effectiveness. STSCO should decrease the average age of the fleet through contracting requirements and more rigorous monitoring to ensure the compliance to contractual requirements. Based on the previously presented analysis, this remains as an issue that needs to be addressed.

The Consortium is encouraged to review its payment clauses to ensure operators are only compensated for work performed and to provide more flexibility to the Consortium in managing operator performance. It is also recommended that STSCO continue to implement its competitive procurement process as an when it is appropriate and advisable to do so.

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 4: Funding Adjustment Formula

Overall Rating	Effect on deficit Board ⁴	Effect on surplus Board
High	Reduce the gap by 100% (i.e. eliminate the gap)	No in-year funding impact; out-year changes are to be determined
Moderate-High	Reduce the gap by 90%	Same as above
Moderate	Reduce the gap by 60%	Same as above
Moderate-Low	Reduce the gap by 0%	Same as above
Low	Reduce the gap by 0%	Same as above

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

Kawartha Pine Ridge District School Board

Item	
2011-2012 Transportation Surplus (Deficit)	\$32,912
% of Surplus (Deficit) attributed to the Consortium	100.00%
Revised amount to be assessed under the Consortium	\$32,912
E&E Rating	Moderate-High
Funding Adjustment based on Ministry's Funding Adjustment Formula	No Adjustment
2012-2013 Total Funding adjustment	No Adjustment

⁴ This refers to Boards that have a deficit/surplus on student transportation

Peterborough Victoria Northumberland and Clarington Catholic District School Board

Item	
2011-2012 Transportation Surplus (Deficit)	\$394,728
% of Surplus (Deficit) attributed to the Consortium	84.53%
Revised amount to be assessed under the Consortium	\$333,670
E&E Rating	Moderate-High
Funding Adjustment based on Ministry's Funding Adjustment Formula	No Adjustment
2012-2013 Total Funding adjustment	No Adjustment

Conseil Scolaire de District Catholique Centre-Sud

Item	
2011-2012 Transportation Surplus (Deficit)	\$283,828
% of Surplus (Deficit) attributed to the Consortium	1.70%
Revised amount to be assessed under the Consortium	\$4,821
E&E Rating	Moderate-High
Funding Adjustment based on Ministry's Funding Adjustment Formula	No Adjustment
2012-2013 Total Funding adjustment	No Adjustment

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

Appendix 1: Glossary of Terms

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
CAO	Chief Administration Officer
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 STSCO	Student Transportation Services of Central Ontario
Deloitte	Deloitte LLP (Canada)
Driver	Refers to bus Drivers, see also operators
E&E	Effectiveness and Efficiency
E&E Review Team	As defined in Section
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
Evaluation Framework	The document, titled “Evaluation Framework for the Renfrew County Joint Transportation Consortium” which supports the E&E Review Team’s Assessment; this document is not a public document
Funding Adjustment Formula	As described in Section 1.3.2
HR	Human Resources
IT	Information Technology
JK/SK	Junior Kindergarten/Senior Kindergarten
KPI	Key Performance Indicators
Management Consultants	As defined in Section
Member Boards, Member Boards, School Boards or Boards	The School Boards that have participated as full Members or members in the Consortium; the KPR, PVNC and CSDCCS
Memo	Memorandum 2006: SB13, dated July 11 issued by the Ministry
Ministry	The Ministry of Education of Ontario

MPS	Management Partnership Services Inc., the routing consultant, as defined in Section 1.2 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 3.2 of the Evaluation Framework
Rating	The E&E Assessment score on a scale of High to Low, see Section 1.3
RFP	Request for Proposal
RFT	Request for Tender
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

Appendix 2: Financial Review – by School Board

Kawartha Pine Ridge District School Board

Item	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013 ⁵
Allocation ⁶	19,570,209	19,359,833	19,194,929	18,988,638	18,221,775
Expenditure ⁷	17,819,305	18,261,157	18,892,069	18,955,726	18,489,441
Transportation Surplus (Deficit)	1,750,904	1,098,676	302,860	32,912	(267,666)
Total Expenditures paid to the Consortium	17,819,305	18,261,157	18,892,069	18,955,726	18,489,441
As % of total Expenditures of Board	100%	100%	100%	100%	100%

Peterborough Victoria Northumberland and Clarington Catholic District School Board

Item	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013
Allocation	10,308,597	10,191,232	10,154,826	10,074,504	9,710,458
Expenditure	9,253,687	9,351,546	9,711,251	9,679,776	9,526,175
Transportation Surplus (Deficit)	1,054,910	839,686	443,575	394,728	184,283
Total Expenditures paid to the Consortium	7,822,141	7,905,025	8,209,090	8,182,484	8,052,643
As % of total Expenditures of Board	84.53%	84.53%	84.53%	84.53%	84.53%

Conseil Scolaire de District Catholique Centre-Sud

Item	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013
Allocation	17,343,813	17,575,626	18,808,900	19,441,523	19,723,844
Expenditure	16,917,760	18,003,707	18,252,288	19,157,695	20,333,457
Transportation Surplus (Deficit)	426,053	(428,081)	556,612	283,828	(609,613)
Total Expenditures paid to the Consortium	\$526,733	\$444,692	\$450,832	\$325,377	\$359,389
As % of total Expenditures of Board	3.11%	2.47%	2.47%	1.70%	1.77%

⁵ 2012-2013 allocations and expenditures based on Ministry data – Revised Estimates for 2012-2013

⁶ Allocation based on Ministry data – includes all grant allocations for transportation (Section 9 00008C, Section 13 00006C, Section 13 00012C)

⁷ Expenditure based on Ministry data – taken from Data Form D: 730C (Adjusted expenditures for compliance) – 212C (Other Revenues)

Appendix 3: Document List

1	C-1a Sample standard Taxi Contract.pdf
2	C-1b Signature sheets for all bus and taxi contracts.pdf
3	C-1c Description of operator compensation, strike pay etc.pdf
4	C-2.txt
5	C-3a Contracted Service Providers.pdf
6	C-3b Sample contract with all operators.pdf
7	C-3c Sample contract with parents and transit.pdf
8	C-4 Driver training curriculum and driver oriented events.pdf
9	C-5 Inventory of Contracted School Bus Fleet with Age of Bus.pdf
10	C-6a Students Receiving Subsidies.pdf
11	C-6b Students Receiving Non-Bus Transportation.pdf
12	C-7a Copy of Operator Performance and Contract Monitoring Program.pdf
13	C-7bi Copies of bus and taxi driver licenses.pdf
14	C-7bii Proof that STSCO collects Operator Insurance Information.pdf
15	C-7biii Vehicle Information Verification.pdf
16	C-7c Operator Information Tracking - Contract Compliance Checklist.pdf
17	C-8a i Accepted Governance Approved Procurement report.pdf
18	C-8a ii Accepted Governance Approved Procurement Update Report.pdf
19	C-8c Special Needs Transportation New Route Checklist.pdf
20	C-9a Board Procedure.pdf
21	C-9a Route and Facility Audit Procedure.pdf
22	C-9b Templates for facility and route audits.pdf
23	C-9c Facility Audits.pdf
24	C-9d MTO Inspection scores.pdf
25	C-9d Vehicle Audits - MTO Inspection.pdf
26	C-9e Route Audits.pdf
27	C-9f Operator Performance Monitoring System - Scores.pdf
28	C-9f Operator Review Scores.pdf
29	C-9g Operator Performance Schedules.pdf
30	CM-1a Signed Governance Agreement.pdf
31	CM-1b Governance Agreement containing dispute policies Sections 10 11 12.pdf
32	CM-2a STSCO Governance Organization Chart.pdf
33	CM-2b Governance Minutes 2012.pdf
34	CM-2b STSCO Administrative Team Information.pdf
35	CM-2c Roles of Governance Committee Section 2.5 and Schedule B.pdf

36	CM-3a STSCO Organization Chart.pdf
37	CM-3b STSCO Job Descriptors.pdf
38	CM-4 Executed Board cost sharing agreement sections 4 and 5 and schedule A.pdf
39	CM-5 Service Level Agreements all Boards.pdf
40	CM-6 Service contract all Boards.pdf
41	CM-7a Proof of Insurance Reassessment.pdf
42	CM-7b Proof of Insurance.pdf
43	CM-8 Procurement Policy - ADM-6.pdf
44	CM-9a Governance Approved Human Resource.pdf
45	CM-9b Appraisal - Board Sample.pdf
46	CM-9b -STSCO Evaluation Program.pdf
47	CM-9c - Student Behaviour Training for Bus Drivers.pdf
48	CM-9c - Training Program.pdf
49	CM-9d - Training Records.pdf
50	CM-9e - Succession Planning.pdf
51	CM-9f Evidence of Goals Objectives Communication with Staff.pdf
52	CM-10 STSCO 2011-2012 Goals and Objectives - Measurement.pdf
53	CM-10a Strategic Planning.pdf
54	CM-10b STSCO 2012-2013 Goals and Objectives.pdf
55	CM-11a Employee Performance Procedure - ADM-8.pdf
56	CM-11a Operator Performance Monitoring System.pdf
57	CM-11b KPI Metrics.pdf
58	CM-11c Metrics reviewed with Stakeholders.pdf
59	CM-11d Tracked Metrics Action Plan Sample.pdf
60	CM-12a KPRDSB Records Management Policy.pdf
61	CM-12a PVNCCDSB Records Management Policy.pdf
62	CM-12a PVNCCDSB Records Management Procedure.pdf
63	CM-12b Information Sharing Agreement all Boards.pdf
64	CM-12c STSCO Records Management principle.pdf
65	CM-12d Confidentiality Agreement with Operators explanation.pdf
66	CM-12e Confidentiality Agreement with Drivers explanation.pdf
67	CM-12f staff confidentiality agreements.pdf
68	CM-12f - Freedom of Information.pdf
69	CM-12f- Confidentiality Agreement.pdf
70	CM-12f- Confidentiality Procedure.pdf
71	CM-13a STSCO Budget process principle.pdf
72	C-13c Evidence of budget to actual review by STSCO management.pdf
73	C-13d Budget to actual reporting Governance Committee.pdf

74	CM-13e Variance Procedure.pdf
75	CM-14a Accounting and Budget Procedure.pdf
76	CM-14b Annual Financial Statement information.pdf
77	CM-14c Annual Financial Statement information.pdf
78	CM-14d STSCO Principle and Procedure Budgeting and Variances.pdf
79	CM-14e Sample Billing for a Service Purchasing Board.pdf
80	CM-14f Financial Verification Procedure 2.pdf
81	CM-14f Financial Verification Procedure.pdf
82	CM-15 Unique Challenges and Issues Facing STSCO.pdf
83	PP-1 Injury Reporting.pdf
84	PP-1 KPR Board Policy and Procedures.pdf
85	PP-1 Lock Down and Emergency Evacuation.pdf
86	PP-1 Peterborough Municipal Transit agreement.pdf
87	PP-1 Ride Time Guidelines.pdf
88	PP-1 Route Audit Procedure.pdf
89	PP-1 School Hour parameters.pdf
90	PP-1 Service Criteria.pdf
91	PP-1 Special Needs - Process Map.pdf
92	PP-1 Special Needs Procedure ADM-19.pdf
93	PP-1 Stop Change Procedure.pdf
94	PP-1 Student Eligibility Board Policies.pdf
95	PP-1 Suspected Abuse.pdf
96	PP-1 Route Audit Template.pdf
97	PP-1 Accessibility Plan Procedure.pdf
98	PP-1 Accident and Resulting Injury.pdf
99	PP-1 STSCO Procedure Manual.pdf
100	PP-1 Courtesy Rider Procedure.pdf
101	PP-1 Decision Making - Appeal Procedure ADM-7.pdf
102	PP-1 Emergency First Aid CPR Epipen Procedure.pdf
103	PP-1 Emergency Procedures - Work Alone.pdf
104	PP-1 Inclement Weather Procedure.pdf
105	PP-2 2012-2013 Annual Cycle Plans.pdf
106	PP-2 Historical Annual Cycle Plans.pdf
107	PP-3 Internal Efficiency Direction.pdf
108	PP-3 Route Planning Philosophy.pdf
109	PP-4 Operational KPI - DMS.pdf
110	PP-4 System KPI - DMS.pdf
111	PP-5 Safety Program - Buster the Bus.pdf

112	PP-5 Safety Program - Monitor Procedure RN-6.pdf
113	PP-5 Safety Program - Wristbands.pdf
114	PP-5 Safety Program First Rider - 2012.pdf
115	PP-5 Safety Programs - Animal pics.pdf
116	PP-5 Safety Programs - Bus Evacuations.pdf
117	PP-5 Safety Program - Buster the Bus contract.pdf
118	PP-6 Driver Training Requirements.pdf
119	PP-7 Specialized Programs.pdf
120	RT-1 Data Flow and Correction procedure.pdf
121	RT-1 Default planning parameters procedure.pdf
123	RT-1 Mapping Changes procedure.pdf
124	RT-1 Ride Times.pdf
125	RT-1 Transfer Procedures.pdf
126	RT-1 Activity Coding.pdf
127	RT-1 Arrival and Departure procedure.pdf
128	RT-1 Bell Time Parameters.pdf
129	RT-1 Bell Time Spectrum - KPI Graph.pdf
130	RT-1 Data backup and recovery procedure.pdf
131	RT-2 Creating New Routes procedure.pdf
132	RT-2 Route modification procedure.pdf
133	RT-2 Route rollover one year to the next procedure.pdf
134	RT-3 Protocol for Information Technology.pdf
135	RT-4 ASR, SSR or DED.pdf
136	RT-4 Assessment Tools.pdf
137	RT-4 CHILD CARE AND BABY SITTING.pdf
138	RT-4 Handout for Route Planners MapNet 5.0.pdf
139	RT-4 How to Make Route Times and Vias Accurate.pdf
140	RT-4 Parent Transportation Manual Rv Aug 2012.pdf
141	RT-4 Route Audit Template.pdf
142	RT-4 Route Verification Manual.pdf
143	RT-4 Route Verification Process.pdf
144	RT-4 Space Available Cheat Sheet.pdf
145	RT-4 Special Needs Manual Aug 2012 rev8.pdf
146	RT-4 Steps to Create PDF of Route.pdf
147	RT-4 STSCO - Taxi Service Information for parents.pdf
148	RT-4 STSCO Daily Management System (DMS).pdf

149	RT-4 STSCO OPERATOR PERFORMANCE MANUAL.pdf
150	RT-4 SUG (Secretaries User Guide).pdf
151	RT-4 TransportationUsersGuide2008.pdf
152	RT-5 STSCO's Technical List.pdf
153	RT-5 STSCO's Technical List - Screen Shots.pdf

Appendix 4: Common Practices

	Elementary			Secondary
	JK/SK	Gr. 1 - 6	Gr. 7-8	GR. 9 - 12
Home to School Distance				
Common Practice	0.8	1.2	1.6	3.2
Policy - KPR	1.0	1.6	1.6	3.2
Policy - PVNC	1.0	1.6	1.6	3.2
NOTE: KPR -The distance is 2.4 for Grades 7 & 8 at stand-alone schools PVNC -The distance is 1.0 to Grade 3				
Home to Bus Stop Distance				
Common Practice	0.5	0.8	0.8	0.8
Policy - KPR	1.0	1.0	1.0	1.6
Policy - PVNC	1.0	1.0	1.0	1.6
NOTES: KPR - The distance is 1.6 for Grades 7 & 8 at stand-alone schools The goal is 500m				
Arrival Window				
Common Practice	18	18	18	18
Policy - KPR	15	15	15	15
Policy - PVNC	15	15	15	15
Practice	15	15	15	15
Departure Window				
Common Practice	16	16	16	16
Policy - KPR	15	15	15	15
Policy - PVNC	15	15	15	15
Practice	15	15	15	15
Earliest Pick Up Time				
Common Practice	6:30	6:30	6:30	6:00
Policy - KPR	Practice: 6:23 AM is the earliest time in the database			
Policy - PVNC				
Latest Drop Off Time				
Common Practice	5:30	5:30	5:30	6:00
Policy - KPR	Practice: 5:17 PM is the latest time in the database			
Policy - PVNC				
Maximum Ride Time				
Common Practice	75	75	75	90
Policy - KPR	60	60	90	90
Policy - PVNC	60	60	90	90
Practice: 91 percent of the students in the AM and 96 percent of the students in the PM have ride times less than 60 minutes				
Seated Students Per Vehicle				
Common Practice	69	69	69	52
Policy	72	72	48	48
Practice	72	72	48	48

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