



## Planning and Priorities Committee Agenda

PPC:021A

Wednesday, November 3, 2021

4:30 p.m.

Electronic Meeting

Trustee Members

Alexander Brown (Chair), Michelle Aarts, Rachel Chernos Lin, Stephanie Donaldson, Trixie Doyle, Harpreet Gill, Parthi Kandavel, Shelley Laskin, James Li, Alexandra Lulka, Dan MacLean, Christopher Mammoliti, Chris Moise, Patrick Nunziata, Zakir Patel, Robin Pilkey, Yalini Rajakulasingam, David Smith, Anu Sriskandarajah, Jennifer Story, Chris Tonks, Manna Wong

### Pages

1. **Call to Order and Acknowledgement of Traditional Lands**
2. **Approval of the Agenda**
3. **Declarations of Possible Conflict of Interest**
4. **Delegations**  
To be presented
5. **Report From Trustees Appointed to the Ontario Public School Boards' Association**
  - 5.1. OPSBA Directors' Report  
To be presented
6. **Toronto Lands Corporation Reports**
  - 6.1. Community Access Agreement: Ossington/Old Orchard Junior Public School, 380 Ossington Avenue 1
  - 6.2. Shared Facilities Agreement: Brookside Public School and Blessed Pier Giorgio Frassati Catholic School Brookside 9
  - 6.3. Brockton Stadium: Lease Agreement Alliance of Portuguese Clubs and Associations of Ontario 13

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October 26, 2021

**Transmittal No. 2021 – 119**  
**(Public)**

To: Alexander Brown, Chair, Toronto District School Board (TDSB)

This communication is to inform you of a recent decision made by the TLC Board at its meeting of October 25, 2021 with respect to the report, *Community Access Agreement: Ossington/Old Orchard Junior Public School, 380 Ossington Avenue*, attached herein.

**The TLC Board decided that:**

- 1) The acceptance of funding in the amount of \$205,000 from the City of Toronto to fund costs associated with site improvements at Ossington/Old Orchard Junior Public School, as outlined in the Appendix C; and
- 2) Authority be granted for TLC to execute a Community Access Agreement with the City of Toronto for a term of ten (10) years commencing in 2022 with key business terms and conditions as specified herein;
- 3) That the Community Access Agreement be in a form and content satisfactory to TLC Legal Counsel; and
- 4) The report be forwarded to TDSB Board for approval.

On behalf of the Board of Directors of the Toronto Lands Corporation, approval of the recommendation in the report, *Community Access Agreement: Ossington/Old Orchard Junior Public School, 380 Ossington Avenue*, is requested.

Sincerely,

A handwritten signature in black ink that reads 'B Patterson'.

Brenda Patterson  
Chair, TLC

cc. D. Sage, Executive Officer, TLC

cc. C. Snider, Interim Associate Director, Business Operations and Service Excellence, TDSB

**Community Access Agreement:  
Ossington/Old Orchard Junior Public School, 380 Ossington Avenue**

**To: Policy & Planning Committee**

**Date: 18 October 2021**

**Committee Action Requested:**  **Decision**       **Discussion**       **Information**

**Recommendations:**

That the Toronto Lands Corporation (TLC) recommends that:

- 5) The acceptance of funding in the amount of \$205,000 from the City of Toronto to fund costs associated with site improvements at Ossington/Old Orchard Junior Public School, as outlined in the Appendix C; and
- 6) Authority be granted for TLC to execute a Community Access Agreement with the City of Toronto for a term of ten (10) years commencing in 2022 with key business terms and conditions as specified herein;
- 7) That the Community Access Agreement be in a form and content satisfactory to TLC Legal Counsel; and
- 8) The report be forwarded to TDSB Board for approval.

**BACKGROUND**

The Toronto District School Board is planning to make site improvements at Ossington/Old Orchard Junior Public School and is partnering with the City of Toronto for funding contributions.

Section 37 of the Planning Act allows the City to collect funds from a development application in return for additional density. The City's policy permits these funds to be allocated toward improvements to school board playgrounds when the playground serves as a local park, where the public will continue to have reasonable access for the foreseeable future, and where there is no local City-owned parkland in the same community and in combination results in a community benefit. As a condition of transferring the Section 37 funds, the City requires TDSB to enter into a Community Access Agreement.

These additional sources of funds create an opportunity for TDSB to make site improvements that provide enhanced learning or physical activity for students and the entire community while strengthening the partnership relationship with the City.

**RATIONALE**

Toronto City Council, on July 14, 2021, has approved a motion (as attached in Appendix A) allocating \$205,000 in funding for site improvements at Ossington/Old Orchard Junior Public School.



## Agenda Page 3

The City funded enhancements to the schoolyard (as highlighted in Appendix B1 and B2) is for a new all purpose asphalt walkway around the playing field playground, new sand pit, a new inclusive and accessible playground, a natural play area, and upgrades basketball courts. These playground improvements will allow students attending the school and those living in the neighbourhood to participate in recreational activities.

In the absence of sufficient City playgrounds nearby, the Ossington/Old Orchard Junior Public School grounds will serve that purpose for the local community.

The estimated cost breakdown of the City funding is highlighted in Appendix C. This project is part of a larger project with additional funding of \$70,000 coming from the school fundraising referred to as the 'OOOPS Fundraising campaign'. According to TDSB staff, the total TDSB approved project budget is estimated at \$485,000 with the City providing a contribution of approximately 27% to the overall project.

The TDSB staff advise that there is no expected student accommodation impact during the construction build out for the playground improvements. In addition, TDSB staff confirms that outdoor playground activity may continue during the construction project and will work with the school principal on an appropriate commencement date to minimize student impact.

### **Key Business Terms and Conditions**

TLC has entered into negotiations with the City of Toronto for the required Community Access Agreement. Outlined below are the proposed key terms and conditions and are subject to TDSB approval.

- Date funding is required from the City: October 2021;
- Purpose: To fund the construction of a new school playground;
- Estimated construction start: July 2022;
- Estimated construction completion: December 2022;
- City's Contribution: \$205,000;
- Term: 10-year term commencing once the construction is completed;
- Termination Clause: TDSB has the right to terminate this Agreement at any time during the term by providing at least six (6) months prior written notice to the City for the purpose of sale of TDSB Lands or for the purpose of constructing buildings or other improvements on TDSB Lands, provided that on termination, TDSB shall pay to the City an amount determined by multiplying the funds by a fraction equal to the remaining number of months in the term divided by 120.
- Community Access: The school yard area shall be exclusively available to TDSB for use during school days, and operating hours, as amended from time to time, and the City will have access for use by the general public during non- school hours until 11pm.

The negotiated terms and conditions are considered fair and reasonable by TLC and will provide overall benefit to students and the local community. Overall, the project represents a good working framework between two public agencies and demonstrates how different school and community needs can be maximized through the effect utilization of public assets.

### **RISK ASSESSMENT**

N/A

### **IMPLICATIONS**

N/A

**FINANCIAL IMPLICATIONS**

N/A

**COMMUNICATIONS APPROACH:**

N/A

**APPENDICIES:**

- Appendix A City of Toronto Council Motion
- Appendix B1 Location of the School and the Project
- Appendix B2 TDSB Master Plan for the Project
- Appendix C Cost Breakdown for the Use of the Section 37 Funds

**Routing**

TLC Board: October 25, 2021  
TDSB Board Cycle: November Cycle

**From**

Daryl Sage, Executive Officer, Toronto Lands Corporation, at [dsage.tlc@tdsb.on.ca](mailto:dsage.tlc@tdsb.on.ca) or at 416-393-0575

Anita Cook, Director, Real Estate & Leasing, Toronto Lands Corporation, at [acook.tlc@tdsb.on.ca](mailto:acook.tlc@tdsb.on.ca) or at 416-573-2716

City Council consideration on July 14, 2021

MM35.3	ACTION	Adopted		Ward: 9
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**Authorization to Release Section 37 Funds to Toronto District School Board for Ossington-Old Orchard Junior Public School Playground - by Councillor Ana Bailão, seconded by Councillor Mike Layton**

**City Council Decision**

**Caution:** This is a preliminary decision. This decision should not be considered final until the meeting is complete and the City Clerk has confirmed the decisions for this meeting.

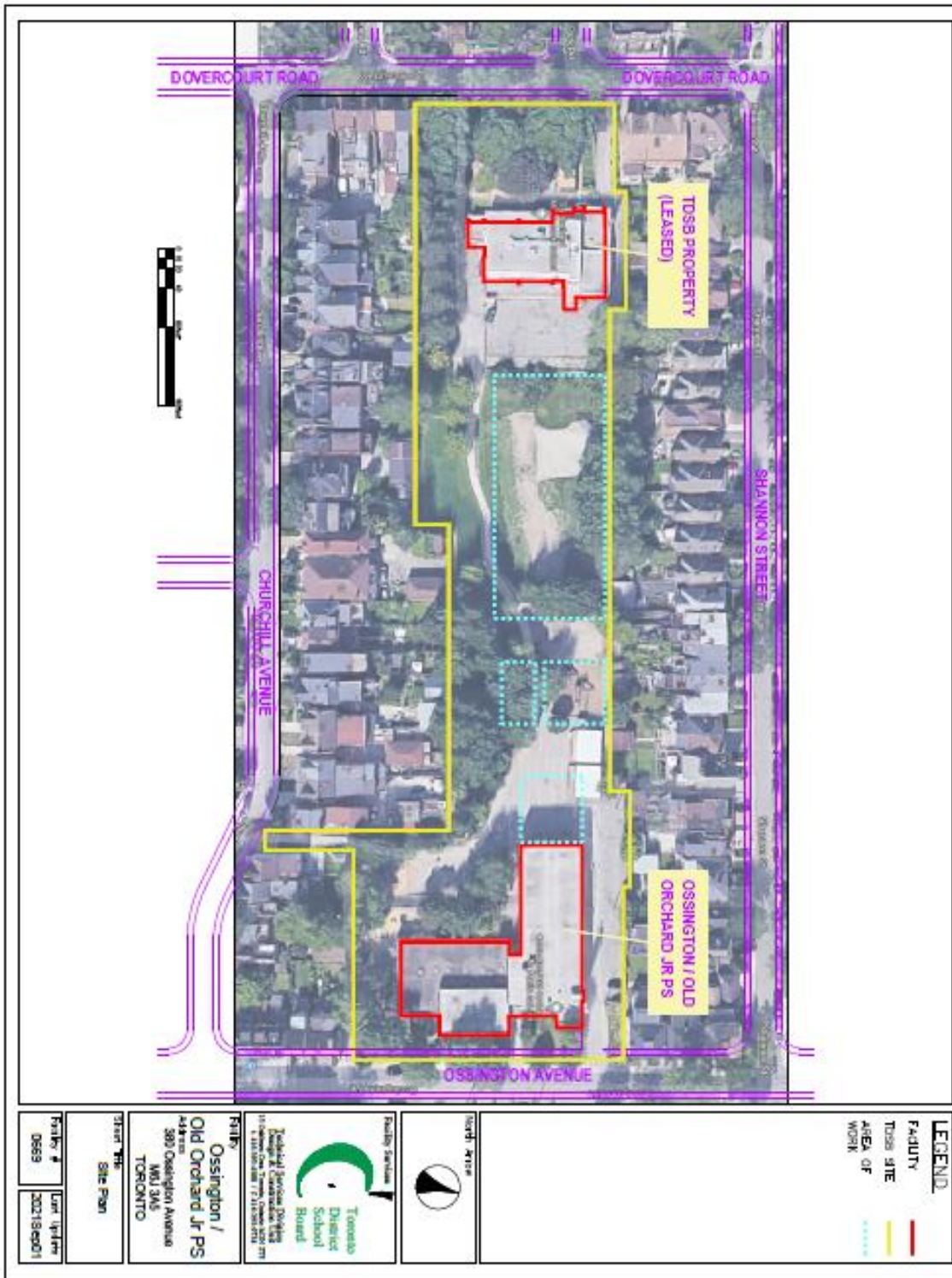
City Council on July 14, 15 and 16, 2021, adopted the following:

1. City Council increase the 2021 Council Approved Operating Budget for Non-Program by \$205,000.00 gross, \$0 net, fully funded by Section 37 funds obtained in the development at 871 to 899 College Street (Source Account: XR3026-3701124), for the purpose of providing one-time capital funding to the Toronto District School Board for playground improvements at Ossington-Old Orchard Junior Public School (Cost Centre NP2161).
2. City Council request City staff from the Management Services Branch, Parks, Forestry and Recreation, to participate in the preparation of the Community Access Agreement and City Council request the City Solicitor to draw up the Agreement, in consultation with the Ward Councillor and Community Planning staff, provided acceptable terms can be agreed upon.
3. City Council authorize the execution of a Community Access Agreement with the Toronto District School Board for the capital improvements to the playgrounds at Ossington - Old Orchard Junior Public School, on terms and conditions satisfactory to the General Manager, Parks, Forestry and Recreation, and in a form satisfactory to the City Solicitor.
4. City Council direct that the funds be forwarded to the Toronto District School Board once the Toronto District School Board has signed a Community Access Agreement with the City, governing the purpose of the funds, the financial reporting requirements, and addressing community access to the playground facilities.
5. City Council direct that the funds be used for: a new asphalt walkway around playing field for a run / walk / bike path around field; new sand pit; a new Inclusive and Accessible Playground; a Natural Play Area; and upgraded basketball courts.

**Background Information (City Council)**

[http://toronto.ca/immia/viewAgendaItemHistory.do?Item=2021\\_MM35.3](http://toronto.ca/immia/viewAgendaItemHistory.do?Item=2021_MM35.3)

**Appendix B1: Location of the School**



**Appendix B2: TDSB Master Plan for the Project**

The City funded enhancements are included in the following master plan for the school yard improvements:



Section 37 Funding

OOOPS Fundraising

TDSB Scope of Work

OSSINGTON OLD ORCHARD PUBLIC SCHOOL (OOOPS)

Master Plan



Map prepared by: [Name] 2018

Issued by: [Name]



**Appendix C: Cost Breakdown for the Use of the Section 37 Funds**

The following table shows the estimated cost breakdown for the City funded enhancements at this school:

<b>Description</b>	<b>Units</b>	<b>No. of Units</b>	<b>Unit Price</b>	<b>Extended Price</b>
Demolition & Removals & Site Prep	LS	1	\$ 10,000.00	\$ 10,000.00
Natural Play Elements	LS	1	\$ 15,000.00	\$ 10,000.00
Basketball Improvements	LS	1	\$ 18,000.00	\$ 15,000.00
Playground Equipment incl. Installation	LS	1	\$ 65,000.00	\$ 65,000.00
Subsurface Drainage & Safety Surfacing	LS	1	\$ 15,000.00	\$ 15,000.00
Asphalt Paving & AODA Access	LS	1	\$ 15,000.00	\$ 55,000.00
Inspection & Testing	LS	1	\$ 2,500.00	\$ 2,500.00
			SUBTOTAL	\$ 172,500.00
			Mobilization & Demobilization	\$ 8,500.00
			Contingency	\$ 10,000.00
			Consulting fees & Permits	\$ 11,677.00
			HST Share (2.16%)	\$ 2,323.00
			<b>TOTAL</b>	<b>\$ 205,000.00</b>



October 26, 2021

**Transmittal No. 2021 – 120**  
**(Public)**

To: Alexander Brown, Chair, Toronto District School Board (TDSB)

This communication is to inform you of a recent decision made by the TLC Board at its meeting of October 25, 2021 with respect to the report, *Shared Facilities Agreement: Brookside Public School and Blessed Pier Giorgio Frassati Catholic School*, attached herein.

**The TLC Board decided that:**

- 1) Authority be granted to TLC, on behalf of TDSB, to enter into a Shared Facilities Agreement with the Toronto Catholic District School Board on the key terms and conditions stated herein for the jointly owned property municipally known as 75 Oasis Boulevard, Brookside Public School and 8 Seasons Drive, Blessed Pier Giorgio Frassati, Catholic School, Toronto;
- 2) The Shared Facilities Agreement is to be in a form and content satisfactory to TLC legal counsel; and
- 3) This report be forwarded to TDSB for approval.

On behalf of the Board of Directors of the Toronto Lands Corporation, approval of the recommendation in the report, *Shared Facilities Agreement: Brookside Public School and Blessed Pier Giorgio Frassati Catholic School*, is requested.

Sincerely,

A handwritten signature in black ink that reads 'B. Patterson'.

Brenda Patterson  
Chair, TLC

cc. D. Sage, Executive Officer, TLC  
cc. C. Snider, Associate Director, Business Operations and Service Excellence, TDSB

**Committee Decision Item**  
**Shared Facilities Agreement: Brookside Public School And**  
**Blessed Pier Giorgio Frassati Catholic School**

**To: Policy & Planning Committee**  
**Date: 18 October 2021**

**Committee Action Requested:**  **Decision**     **Discussion**     **Information**

**RECOMMENDATION:**

It is recommended that:

- 4) Authority be granted to TLC, on behalf of TDSB, to enter into a Shared Facilities Agreement with the Toronto Catholic District School Board on the key terms and conditions stated herein for the jointly owned property municipally known as 75 Oasis Boulevard, Brookside Public School and 8 Seasons Drive, Blessed Pier Giorgio Frassati, Catholic School, Toronto;
- 5) The Shared Facilities Agreement is to be in a form and content satisfactory to TLC legal counsel; and
- 6) This report be forwarded to TDSB for approval.

**BACKGROUND**

In April of 2006 TDSB and TCDSB jointly acquired a property with an equal 50% interest in the entire site. The site is approximately 6.0 acres and was jointly acquired for the purpose of sharing the land with each having a stand-alone school building. TDSB and TCDSB have each constructed their elementary schools on the property and share the use of certain outdoor facilities necessary for their programs. TDSB erected Brookside Public School in 2007 with the municipal address of the school being 75 Oasis Boulevard with TCDSB opening Blessed Pier Giorgio Frassati in September of 2013.

Since the inception of the joint operations there was no formal arrangement with respect to the sharing and maintenance of the shared outdoor space consisting primarily of a soccer field and the remaining areas as hard cover surface. Most important, TDSB advised that the design and layout of the outdoor areas have resulted in numerous safety concerns for the students with on-going slip and fall injuries. In addition, TDSB advises that due to inclement weather throughout the school season the soccer field is not useable. The total 6A site constrained by two traditional schools provide limited options for improved design and functionality although attempts have been made to create an improved Master Plan

With both Boards in full operations on the site the TCDSB and TDSB have indicated the urgent need to finalize a shared facilities agreement prior to the creation and implementation of any redesign or renovation of the existing outdoor areas. As a result, TLC commenced negotiations with the TCDSB to develop an agreement that would govern the outdoor areas for the school boards.

The Shared Facilities Agreement will provide for (1) the mutual use, enjoyment and operation of the Shared Use Areas, (2) the ongoing maintenance, repair, cleaning and replacement of the Shared Use Areas and (3) the payment of each Party's Proportionate Share of the Operating Costs.



## **RATIONALE**

Through a collaborative approach, TLC has negotiated terms and conditions of a Shared-Use Agreement that provides for a structured governance model for the long-term operation of the site and fair and reasonable approach for operations by both parties. The TCDSB has obtained its requisite authority and subsequently executed the negotiated agreement.

The key business terms of the Shared-Use Agreement are detailed herein:

- The creation of a Management Committee comprised of the Principal of each school and one Facility Manager from each school.
- The Committee will provide direction with respect to the operation of the Shared Use Areas and any alterations that will affect the overall site.
- The Shared-Use Areas are the soccer field, outdoor play areas and childcare parking lot as identified in the Site Plan attached as Appendix A to this report.
- The Shared Facilities Agreement sets out the sharing of the costs, budgets, reconciliation of expenditures with payments to be settled within 30 days.
- At a minimum, bi-annual meetings will be held to discuss scheduling of outdoor playtimes, recesses and soccer field use.
- TDSB will maintain the soccer field and bill back 50% of the costs to TCDSB.
- If there is a decision to permit the soccer field, the permitting of the field to third parties will alternate every 3 years with each party keeping the revenue for their respective periods starting with TDSB.
- A structured dispute resolution process will resolve any disputes with the ability to go to arbitration within a specified time frame.

Authority to execute the Shared-Use Agreement will allow TDSB staff to commence discussions on a new Master Plan with the TCDSB to address the safety concerns of the students at both schools and provide ongoing governance over the shared property. The agreement represents two public agencies working collaboratively to benefit the school communities.

**RISK ASSESSMENT:** Low Risk

**IMPLICATIONS:** N/A

**COMMUNICATIONS APPROACH:** N/A

### **Appendix A: Site Plan**

#### **Routing**

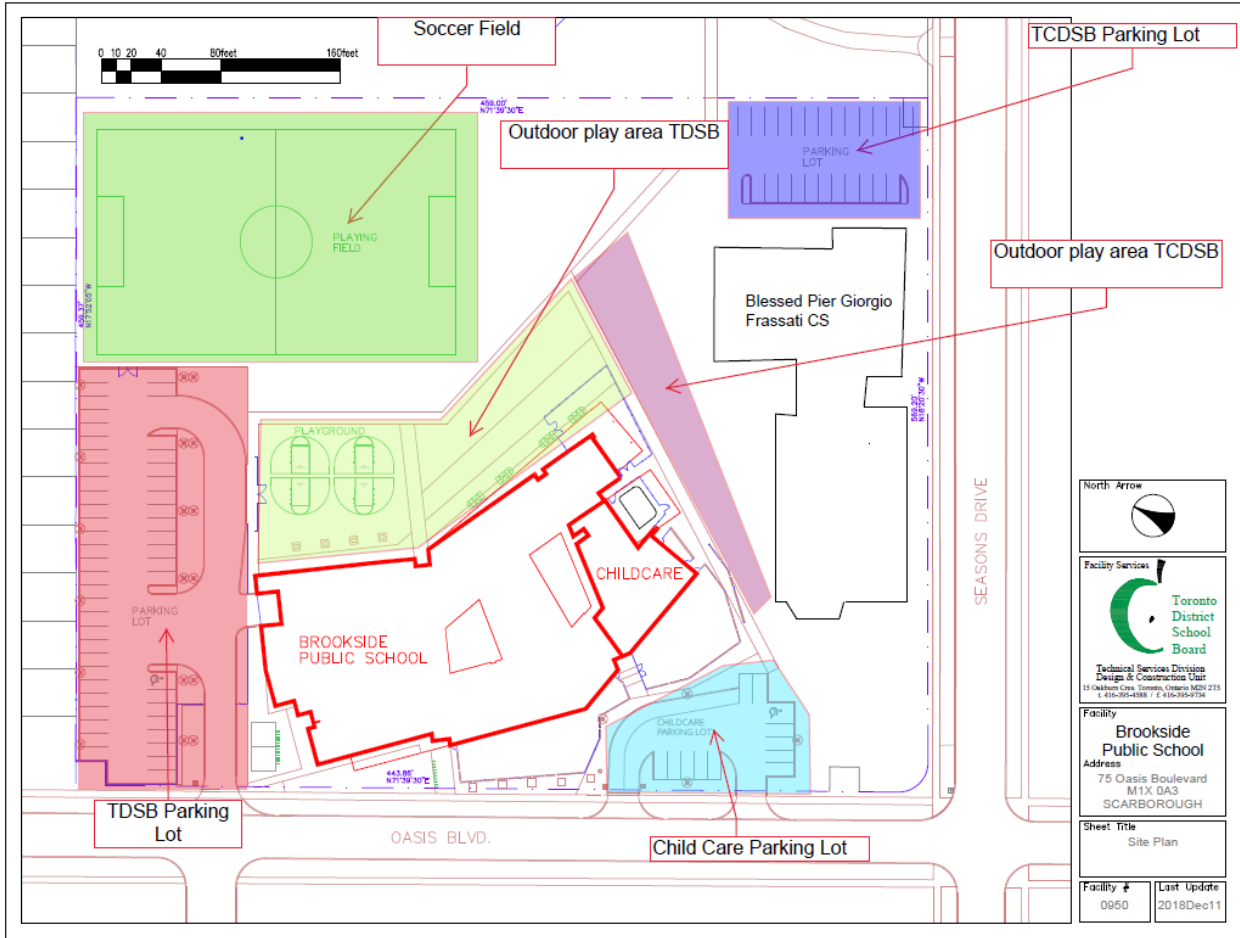
TLC Board: October 25, 2021

#### **From**

Daryl Sage, Executive Officer, Toronto Lands Corporation, at [dsage.tlc@tdsb.on.ca](mailto:dsage.tlc@tdsb.on.ca) or at 416-393-0575.

Anita Cook, Director of Real Estate & Leasing, at [acook.tlc@tdsb.on.ca](mailto:acook.tlc@tdsb.on.ca) or at 416-573-2716

APPENDIX A  
BROOKSIDE PS AND BLESSED PEIR GIORGIO FRASSITI CATHOLIC SHOOL  
SITE PLAN





October 26, 2021

**Transmittal No. 2021 – 121**  
**(Public)**

To: Alexander Brown, Chair, Toronto District School Board (TDSB)

This communication is to inform you of a recent decision made by the TLC Board at its meeting of October 25, 2021 with respect to the report, *Brockton Stadium: Lease Agreement Alliance of Portuguese Clubs and Associations of Ontario (APCAO)*, attached herein.

**The TLC Board decided that:**

- 1) In accordance with subsection 194(3) of the Education Act, TDSB pass a resolution that the Brockton Stadium municipally known as 515 Brock Avenue, Toronto is not required for the purposes of the Board;
- 2) TLC be authorized to circulate a proposal under Regulation 444/98 for a lease having a term of two (2) years on the terms and conditions detailed herein;
- 3) If no lease with a public body is entered into resulting from the circulation, authority be given to TLC to enter into a lease with the Alliance of Portuguese Clubs and Associations of Toronto (APCAO) on the terms described in the proposal; and
- 4) The Lease Agreement is to be in a form and content satisfactory to TLC legal counsel; and
- 5) The TLC Report be forwarded to TDSB for approval.

On behalf of the Board of Directors of the Toronto Lands Corporation, approval of the recommendation in the report, *Brockton Stadium: Lease Agreement Alliance of Portuguese Clubs and Associations of Ontario (APCAO)*, is requested.

Sincerely,

A handwritten signature in black ink that reads 'B Patterson'.

Brenda Patterson  
Chair, TLC

cc. D. Sage, Executive Officer, TLC

cc. C. Snider, Associate Director, Business Operations and Service Excellence, TDSB

**Committee Decision Item**  
**Brockton Stadium: Lease Agreement**  
**Alliance of Portuguese Clubs and Associations of Ontario (APCAO)**

**To: Policy & Planning Committee**

**Date: 18 October 2021**

**Committee Action Requested:**  **Decision**       **Discussion**       **Information**

**RECOMMENDATION:**

It is recommended that:

- 6) In accordance with subsection 194(3) of the Education Act, TDSB pass a resolution that the Brockton Stadium municipally known as 515 Brock Avenue, Toronto is not required for the purposes of the Board;
- 7) TLC be authorized to circulate a proposal under Regulation 444/98 for a lease having a term of two (2) years on the terms and conditions detailed herein;
- 8) If no lease with a public body is entered into resulting from the circulation, authority be given to TLC to enter into a lease with the Alliance of Portuguese Clubs and Associations of Toronto (APCAO) on the terms described in the proposal; and
- 9) The Lease Agreement is to be in a form and content satisfactory to TLC legal counsel; and
- 10) The TLC Report be forwarded to TDSB for approval.

**BACKGROUND:**

Brockton Stadium, municipally known as 515 Brock Avenue situated at the corner of Brock and Croatia, near the intersection of Bloor Dufferin, has been associated with the former Brockton Learning Centre (since demolished) and Bloor Collegiate. The Alliance of Portuguese Clubs and Associations of Toronto (APCAO) has been the sole tenant of the TDSB Stadium since 2003. APCAo used the Brockton stadium for its soccer associations and have identified this facility as one of the premier natural turf fields in the City and a key field for programming.

The lease has just expired and at the present time, the tenant is overholding on the existing terms and conditions on a month-to-month basis. The existing lease provided school use during the day and by APCAo during the evenings and weekends. The agreement allows the tenant to fund upgrades to the field in exchange for a reduction in the rental payment. The tenant has completed extensive upgrades to the site. The tenant has approached TLC and indicated that they would like to renew the lease and continue operations at the Brockton Site for a further two (2) year term.

**RATIONALE:**

Bloor Collegiate Institute and Alpha II Alternative School building currently fronting onto Bloor Street have been sold. As a result, the former Brockton school location at 90 Croatia Street currently vacant

land, will be the location for the new Bloor CI replacement school and according to TDSB will commence construction shortly. The Brockton Stadium situated directly across the street will become the playing field daily when the new school is opened. In the interim, it remains a good option for TDSB to continue to lease the facility and to ensure it remains in a good state of repair.

Subject to satisfactory completion of the Ont. Reg. 444/98, TDSB staff is recommending TLC enter into a new lease having an expiration date of August 31, 2023, with the expectation that the new Bloor CI/Alpha II will commence operations thereafter.

The existing tenant, APCA0, has been an occupant of the Stadium since 2003. Upon the lease expiry and confirmation from TDSB, TLC has negotiated a two-year agreement, conditional upon Board approvals, completion of Ont. Reg. 444/98, no other public agency express an interest to lease during the preferred agency circulation period. and other conditions as stated herein.

Key business terms are as follows:

Term: September 1, 2021 to August 31, 2023, with no further right of extension.

Lease Rate: \$70,000 to be offset by operating expenses, repair and all maintenance costs (an increase from the previous amount of \$50,000)

#### Community Access:

Under the existing lease, community access was granted upon request through the TDSB or the community. It is preferable to have specific hours of use available to the community that can be posted on the APCA0 web site.

Dedicated community access will be all Sundays from 9 a.m. to 9 p.m. plus a minimum of one evening (1) per week from 5 PM to 9 PM.

The Club also covenants and agrees that it will consider in good faith any requests by the public to have access to and use of the Stadium at other times to the extent that such requests can be facilitated having regard to the Club's own use.

Should the community be requesting access during the day (Monday through Friday) and/or Saturday/ or holidays during the term of this Agreement, TLC will provide 30 days advance written Notice to the Tenant, thereby allowing up to two (2) days access during the day from 9 AM to 5 PM on Monday – Friday (the days to be selected at the time by the Tenant and one (1) holiday from 8a.m. to 5pm.) The Tenant may be requested to install automatic locking mechanisms during these community access periods. TDSB will be responsible for any damage or repairs caused by the community during community access periods. Should the Tenant be provided Notice and thereby be required to allow the additional community access during the July and August periods as aforementioned, the community use, including the up to two (2) evenings and Sunday, will be required to be posted on the Tenant's website.

#### Tenant Use:

The Stadium shall be used and occupied only for the purpose of holding sporting events and related activities and uses ancillary thereto and for no other purpose. Such use by the tenant shall be restricted to the following times:

- (i) July 1 to August 31 - unrestricted, except for one (1) evening per week available to public from 5 PM to 9 PM and Sundays from 9 AM to 9 PM

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- (ii) April 1 to June 30 and September 1 to September 30 - after 6:00 p.m. only, Mondays to Fridays, exclusive of statutory holidays except for one (1) evening per week available to public from 5 PM to 9 PM and Sundays from 9 AM to 9 PM
- (iii) April 1 to June 30 and September 1 to September 30 – unrestricted (Saturdays and Statutory Holidays) except for one (1) evening per week available to public from 5 PM to 9 PM and Sundays from 9 AM to 9 PM
- (iv) all other times – only upon written approval of TDSB

As the TDSB will not be relying on Brockton Stadium for programming purposes until the new Bloor C1/Alpha II is built, it is fair and reasonable to enter into a new short term, two-year agreement with the existing tenant, APCAO, subject to satisfactory completion of the Regulatory requirements. APCAO will continue to maintain and repair the facility. New scheduled community access during this timeframe will benefit the community at large and represents a joint positive collaboration between all parties to maximize the use of the public asset.

### **RISK ASSESSMENT**

Low Risk

### **IMPLICATIONS**

N/A

### **COMMUNICATIONS APPROACH**

N/A

### **Routing**

TLC Board: October 25, 2021

### **APPENDICIES:**

#### **Appendix A: Aerial Map: Brockton Stadium**

#### **From**

Daryl Sage, Executive Officer, Toronto Lands Corporation, at [dsage.tlc@tdsb.on.ca](mailto:dsage.tlc@tdsb.on.ca) or at 416-393-0575.

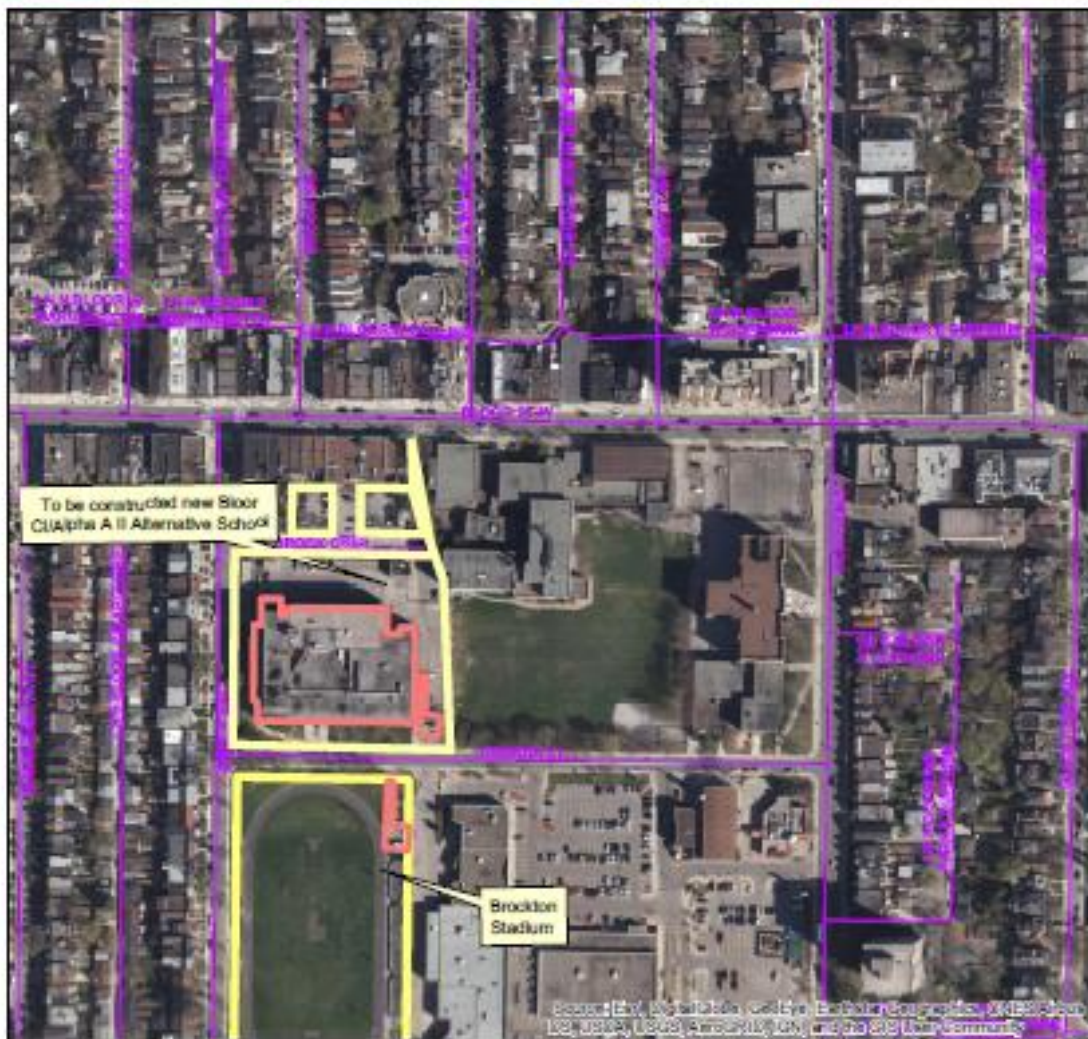
Anita Cook, Director of Real Estate & Leasing, at [acook.tlc@tdsb.on.ca](mailto:acook.tlc@tdsb.on.ca) or at 416-573-2716





Appendix A

Brockton Stadium



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October 26, 2021

**Transmittal No. 2021 – 122**  
**(Public)**

To: Alexander Brown, Chair, Toronto District School Board (TDSB)

This communication is to inform you of a recent decision made by the TLC Board at its meeting of October 25, 2021 with respect to the report, *Church Street Junior Public School: Parking Lease Agreement Conseil Scolaire Viamonde (CSV)*, attached herein.

**The TLC Board decided that:**

- 1) TLC be authorized enter into a lease agreement, on behalf of TDSB, with Conseil Scolaire Viamonde (CSV) for twenty-five (25) parking spaces in their facility at 100 Carlton Street for a term of one (1) year, effective September 1, 2021, with an option for an additional (1) year and further terms and conditions as detailed herein;
- 2) The Lease Agreement is to be in a form and content satisfactory to TLC legal counsel; and
- 3) The TLC Report be forwarded to TDSB for approval.

On behalf of the Board of Directors of the Toronto Lands Corporation, approval of the recommendation in the report, *Church Street Junior Public School: Parking Lease Agreement Conseil Scolaire Viamonde (CSV)*, is requested.

Sincerely,

A handwritten signature in black ink that reads 'B. Patterson'.

Brenda Patterson  
Chair, TLC

cc. D. Sage, Executive Officer, TLC  
cc. C. Snider, Associate Director, Business Operations and Service Excellence, TDSB



## Agenda Page 21

Option to Renew: At the Tenant's discretion, having an option to renew for a further one (1) year term;

Termination: Tenant has the right to terminate upon 30 days' notice

Lease Rate: \$100.00 per spot each for ten months

Number of spots: 25

Total Annual Gross Expenditure: \$25,000.

Taking into consideration the school site, location, and Covid, the CSV has provided a fair and reasonable new lease opportunity for the TDSB. Reviewing parking rates in this vicinity, the proposed rent is below market for this neighbourhood which has extremely limited parking. Generally, street parking is \$5 per hour with surface parking being over \$20 per day. CSV has not increased the rental rate since inception and the new lease would keep the rental rate the same. This arrangement represents an example of collaboration between two school boards to accommodate short term needs beneficial to both parties.

**RISK ASSESSMENT: N/A**

**IMPLICATIONS: N/A**

**COMMUNICATIONS APPROACH: N/A**

### **Routing**

TLC Board: October 25, 2021

### **APPENDIX:**

#### **Appendix A: Aerial Map: Church Street Junior Public School and CSV**

#### **FROM**

Daryl Sage, Executive Officer, Toronto Lands Corporation, at [dsage.tlc@tdsb.on.ca](mailto:dsage.tlc@tdsb.on.ca) or at 416-393-0575.

Anita Cook, Director of Real Estate & Leasing, at [acook.tlc@tdsb.on.ca](mailto:acook.tlc@tdsb.on.ca) or at 416-573-2716

Appendix A: Aerial Map: Church Street Junior Public School and CSV





October 26, 2021

**Transmittal No. 2021 – 123**  
**(Public)**

To: Alexander Brown, Chair, Toronto District School Board (TDSB)

This communication is to inform you of a recent decision made by the TLC Board at its meeting of October 25, 2021 with respect to the report, *Golden Mile: 1920 Eglinton Avenue East: Potential Elementary School Site*, attached herein.

**The TLC Board decided that:**

- 1) TDSB grant authority and direct TLC to enter into negotiations with 1920 Eglinton Avenue Holdings Ltd. to enter into a non-binding Memorandum of Understanding to secure strata, non-condominium title ownership of the podium and any other necessary and/or complementary elements of a future elementary school situated in Madison's Group new development on the lands municipally known as 1920 Eglinton Avenue East, in a form and content satisfactory to its legal counsel;
- 2) TLC report back within one year on the status of negotiations; and
- 3) This report be forwarded to TDSB Board for approval.

On behalf of the Board of Directors of the Toronto Lands Corporation, approval of the recommendation in the report, *Golden Mile: 1920 Eglinton Avenue East: Potential Elementary School Site*, is requested.

Sincerely,

A handwritten signature in black ink that reads 'B. Patterson'.

Brenda Patterson  
Chair, TLC

cc. D. Sage, Executive Officer, TLC

cc. C. Snider, Associate Director, Business Operations and Service Excellence, TDSB



**Committee Decision Item:**  
**Golden Mile:1920 Eglinton Avenue East: Potential Elementary School Site**

**To: Policy & Planning Committee**  
**Date: 18 October 2021**

**Committee Action Requested:**  **Decision**     **Discussion**     **Information**

**RECOMMENDATION:**

It is recommended that:

- 1) TDSB grant authority and direct TLC to enter into negotiations with 1920 Eglinton Avenue Holdings Ltd. to enter into a non-binding Memorandum of Understanding to secure strata, non-condominium title ownership of the podium and any other necessary and/or complementary elements of a future elementary school situated in Madison's Group new development on the lands municipally known as 1920 Eglinton Avenue East, in a form and content satisfactory to its legal counsel;
- 2) TLC report back within one year on the status of negotiations; and
- 3) This report be forwarded to TDSB Board for approval.

**BACKGROUND**

The purpose of proceeding with this authority to act on an identified opportunity that meets the future accommodation needs of the TDSB while partnering with the private sector to enable the creation of a complete community that includes a new elementary public school.

Golden Mile

The Golden Mile area of the former City of Scarborough boundaries include Asthonbee Road to the north; Eglinton Avenue East is the main southerly boundary; Birchmount Road to the east; and Victoria Park Avenue to the west. As with other parts of the City, neighbourhoods are under transition for numerous reasons and as the City is the planning authority its responsibility is to review, analyze and make policies that will guide new community development for decades into the future.

With the construction of the Eglinton Crosstown LRT, the Golden Mile Secondary Plan Study was initiated in May, 2016, to set out the planning framework for the redevelopment and transformation from an auto-oriented retail and industrial area into a higher density, mixed-use, transit-supportive community. The study was to develop a long-term vision and comprehensive planning framework that would direct and guide the overall built form, appropriate residential and non-residential development, public realm, community infrastructure, transportation, to name a few of items for consideration.

City of Toronto Council adopted the Golden Mile Secondary Plan (Official Plan Amendment No. 499) as well as Urban Design Guidelines for the Golden Mile area on October 30, 2020. Since that time, the various property owners have appealed the Secondary Plan to the Ontario Land Tribunal (formerly LPAT). TLC has also appealed the Secondary Plan to protect TDSB's interests. For reference, at-

tached as Appendix A is an overall secondary site plan of the Golden Mile area with hatched lines and red dots that identify the ten major property owners in this vicinity.

The property owners are developers who, in the long term, will look to redevelop parcels with mixed-use residential, commercial and office buildings. The transit improvements on Eglinton (Metrolinx) has provided a key component to these redevelopments as Provincial planning policies now require minimum density targets around major transit stations (Golden Mile) which results in intensified land use at higher densities that take the form of multiple buildings and higher towers on smaller sites.

Therefore, large stand-alone school sites do not support the City's and Province's visions for growth and more efficient use of land. Integrating a school into a mixed-use development is an opportunity to support a complete community at the Golden Mile.

### TDSB Long Term School Requirements

Through the Golden Mile Secondary Plan Study, Toronto District School Board (TDSB) staff identified the need for a new elementary school site within the Secondary Plan area to locally accommodate projected student growth. The Golden Mile Secondary Plan, adopted by City Council on October 30, 2020, also reflects the need for a new elementary school and highlights the importance of providing adequate community services (including schools) and planning for complete communities.

The TDSB advises that it supports schools in mixed-use developments (condominiums or commercial buildings) as appropriate solutions for accommodating students as a result of various Board resolutions in support of this initiative. Specifically, in 2015-2016, TDSB advises that the Long-Term Program and Accommodation Strategy has a section on Toronto's Vertical Growth that states that schools in mixed-use developments are part of the TDSB's strategy for accommodating students. In addition, the TDSB provides that the Guiding Principles for long-term planning approved by the Trustees include Principle #11 that directs staff to explore different models of school organization including schools in mixed-use developments.

School boards have no authority, under the Planning Act, to require developers to provide land for a school site. None of the lands at the Golden Mile location are currently in public ownership. Parklands and roads are conveyed to the City as part of the approved redevelopment schemes. The numerous developers in this area are all at different stages of their development proposals. As TDSB indicated the need for a school, TLC has been monitoring the activity in this area and has reached out to all the key landowners within the Golden Mile that are proposing to build a mixed-use redevelopment, with adjacency to proposed parkland. One of the most significant factors for the TDSB is the ability to enter into an exclusive use with conditions with the City for use of an adjacent park for student outdoor requirements in order to deliver a school program. In most cases, the proposed parks are situated across a public street from a new building and TLC was seeking a project whereby the park was abutting the new building. Overall, the development blocks are not large enough for a developer to be interested in selling a minimum of three acres to a school board and remain with a property that would be a viable development proposition for its organization. TLC has developed a volunteer process whereby meeting with and working with developers could provide for schools in towers. An overview is provided in Appendix B attached to this report.

### Madison Group (1920 Eglinton Avenue Holdings Ltd.)

Madison Group, is a real estate development company based in Toronto and New York City. According to its web site, the organization was originally a family business and after 55 years in operation is a multi-faceted company that owns, develops and manages residential (low and high rise) and commercial properties. TLC has had previous experience with the Madison Group regarding the disposition and redevelopment of TDSB's Lawrence/Midland site.

Madison has a large number of projects at various stages of development in Toronto. Madison Group explains that their philosophical goal is to build a community for the residents. Specifically, the Madison website, states, “ Madison is dedicated to creating vibrant, integrated communities rooted in highly desirable locations that elevate the lifestyle of their residents. Developments are brought to life with innovative architecture, thoughtful design, and strategic partnerships, resulting in dynamic destinations.” From a TDSB/TLC perspective, a complete community includes a school to facilitate a place to learn, play and build community. A new school at the Golden Mile location, similar to other TDSB facilities, would be available after school hours for permits, or a shared-use agreement with the City for use of the gym, library or classrooms for on-going programming which can provide additional community benefit.

Madison’s property at the Golden Mile is identified on Appendix A. While it has not finalized and received approvals on all aspects of its development, it is very interested to partner with the TLC and provide for a school on its site.

### **RATIONALE**

Madison’s property in the Golden Mile district is comprised of three separate properties: municipally known as 20 Ashtonbee Road (20 Ashtonbee Holdings Limited), 1920 Eglinton Avenue East (1920 Eglinton Avenue Holdings Limited) and 1940 Eglinton Avenue East, 880-900 Warden Avenue, 50 Ashtonbee Road (Warden Eglinton Developments Limited). The land holdings are highlighted in the map on Appendix A. This is a long term development scheme and the proposed location for a school would be in the 1920 Eglinton Avenue East parcel which would be constructed at least ten years in the future. It remains too early in the process and with many uncontrollable elements at such a large area in transition to provide an exact date and there is an understanding that this timeline could be extended. Therefore, it is anticipated that by the time Madison is in a position to construct this phase of the project, the Golden Mile area will have had residential redevelopments completed with students requiring a local school in this new community.

Currently, Madison, similar to other developers in the Golden Mile, has proposed an Official Plan Amendment application to create a new Site Area Specific Policy (SASP) that would guide future development on the subject site, while retaining the site’s existing *Mixed Use Areas* designation. The associated Planning Justification Report, dated February 2019, notes that development blocks created through the SASP would be “large enough to facilitate a complete community and accommodate a mix of uses, including retail, commercial, office and residential”. The precise gross floor areas for each type of use, as well as building heights, any residential unit counts, and similar details, will be finalized at a later stage in the planning process. In April 2020, Madison appealed the application to the Local Planning Appeal Tribunal (now the Ontario Land Tribunal (OLT)) as a result of the City’s failure to make a decision on the application within the statutory timeframe.

In February 2021, City Council directed City staff to oppose the development in its current form, but to continue discussions with Madison to resolve the outstanding issues. Since that time, Madison advises it has continued to meet with the City discussing details to its redevelopment project. Madison has advised the City of its interest to pursue a new elementary school in a proposed seven storey office tower with the first two floors comprised of an approximate 56,000 sq ft TDSB elementary school, with outdoor podium space, separate entrance for the students, and situated adjacent to a City park of approximately 2.6 acres in size. The main frontage of the office building/school would front onto the City park and the rear of the building would abut a new public street that could be used for pick-up and drop-off for students avoiding the Eglinton Ave street frontage. The location and amenities for the school board present the best opportunity in the Golden Mile district. The opportunity is to secure a school, through a negotiated non-binding Memorandum of Understanding (MOU) with 1920 Eglinton Avenue Holdings Ltd. (Madison Group) that would, in principle, identify the key business terms and conditions for a school to be constructed in the future building.



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A few key highlights include, the TDSB would own, in strata, non-condo, the space with the requisite, easements and various agreements associated with the operation, plus a separate entrance for school use only. Any transaction will be contingent upon TDSB entering into an exclusive, with conditions, shared-use agreement with the City of Toronto, Parks Recreation and Forestry department to use a portion of the public park on all school days. The non-binding MOU would require Ministry of Education approval in principle. Should the Ministry of Education not approve the acquisition and/or construction of the new school in the future, the non-binding MOU will stipulate that the proposed space may be converted back to office use with no liability to TLC/TDSB. Timing of project, determination of market value for acquisition, construction, etc. terms would be part of the MOU.

Madison has clearly provided its intention to work collaboratively with the City in its overall project and TLC in support of the school boards needs to develop TLC's concept of building complete communities. Prior to proceeding any further, it is fair and reasonable for TLC to seek approval to enter into real estate negotiations with the Madison Group which will formalize discussions. A commitment of this nature is required to enter into the next steps of securing a school within this new community adjacent to a City park. TLC's strategy will provide for long term student accommodation and supports the modernization of TDSB's portfolio to create vibrant communities within the City.

**RISK ASSESSMENT:** N/A

**IMPLICATIONS:** N/A

**COMMUNICATIONS APPROACH:** N/A

**APPENDICIES:**

Appendix A: Overview Golden Mile Secondary Plan Sites

Appendix B: Site Reservations versus New Process for Acquisition of Property for Future Schools

**ROUTING:**

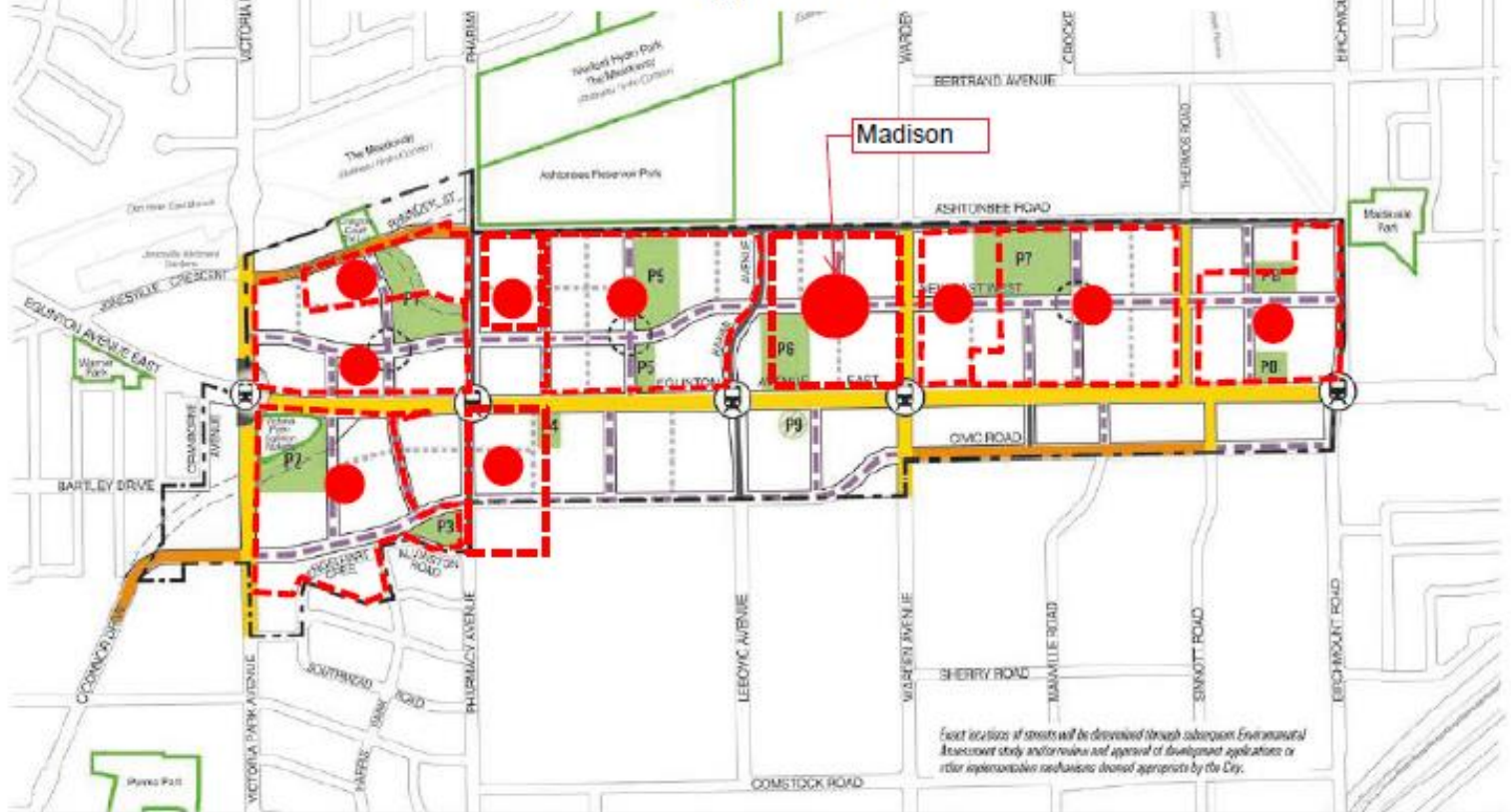
TLC Board: October 25, 2021

**FROM:**

Daryl Sage, Chief Executive Officer, Toronto Lands Corporation, at [dsage.tlc@tdsb.on.ca](mailto:dsage.tlc@tdsb.on.ca) or at 416-393-0575.

Anita Cook, Director of Real Estate & Leasing, at [acook.tlc@tdsb.on.ca](mailto:acook.tlc@tdsb.on.ca) or at 416-573-2716

## Golden Mile: 1920 Eglinton Avenue, Madison Group Appendix A



### Golden Mile Secondary Plan

MAP 45-4 Structure Plan

<ul style="list-style-type: none"> <li><span style="border-bottom: 2px dashed black; width: 20px; display: inline-block;"></span> Secondary Plan Boundary</li> <li><span style="border-bottom: 2px dashed black; width: 20px; display: inline-block;"></span> Existing Street within the Secondary Plan Boundary to be Potentially Realigned/Reconfigured</li> </ul>	<ul style="list-style-type: none"> <li><span style="border-bottom: 2px solid yellow; width: 20px; display: inline-block;"></span> Existing Street to be Widened</li> <li><span style="border-bottom: 2px solid orange; width: 20px; display: inline-block;"></span> Existing Street to be Widened / Reconfigured</li> <li><span style="border-bottom: 2px solid black; width: 20px; display: inline-block;"></span> Existing Street with Improved Streetscape</li> <li><span style="border-bottom: 2px dashed black; width: 20px; display: inline-block;"></span> New Street</li> <li><span style="border-bottom: 2px dotted black; width: 20px; display: inline-block;"></span> New Conceptual Street</li> </ul>	<ul style="list-style-type: none"> <li><span style="border: 1px solid green; border-radius: 50%; width: 15px; height: 15px; display: inline-block;"></span> Green Space</li> <li><span style="border: 1px solid black; border-radius: 50%; width: 15px; height: 15px; display: inline-block;"></span> Eglinton/Victoria Park Gateway</li> <li><span style="border: 1px solid black; border-radius: 50%; width: 15px; height: 15px; display: inline-block;"></span> Transit Node</li> </ul>	<ul style="list-style-type: none"> <li><span style="border: 1px solid green; width: 20px; height: 10px; display: inline-block;"></span> Existing Park</li> <li><span style="background-color: #90EE90; width: 20px; height: 10px; display: inline-block;"></span> New Park</li> <li><span style="border: 1px dashed green; width: 20px; height: 10px; display: inline-block;"></span> Conceptual Park Location (Rule to Policy 5.21)</li> </ul>
<ul style="list-style-type: none"> <li><span style="background-color: #90EE90; width: 15px; height: 15px; display: inline-block;"></span> New Park Index</li> <li><span style="background-color: #90EE90; width: 15px; height: 15px; display: inline-block;"></span> P1 West Park</li> <li><span style="background-color: #90EE90; width: 15px; height: 15px; display: inline-block;"></span> P2 Eglinton Square Park</li> <li><span style="background-color: #90EE90; width: 15px; height: 15px; display: inline-block;"></span> P3 South Park</li> <li><span style="background-color: #90EE90; width: 15px; height: 15px; display: inline-block;"></span> P4 Pharmacy/Eglinton Park</li> </ul>		<ul style="list-style-type: none"> <li><span style="background-color: #90EE90; width: 15px; height: 15px; display: inline-block;"></span> P5 Central Park N &amp; S</li> <li><span style="background-color: #90EE90; width: 15px; height: 15px; display: inline-block;"></span> P6 Hales Park</li> <li><span style="background-color: #90EE90; width: 15px; height: 15px; display: inline-block;"></span> P7 East Park</li> <li><span style="background-color: #90EE90; width: 15px; height: 15px; display: inline-block;"></span> P8 Birchmount Park N &amp; S</li> <li><span style="background-color: #90EE90; width: 15px; height: 15px; display: inline-block;"></span> P9 Employment Park</li> </ul>	



## Appendix B

### Site Reservations versus New Process for Acquisition of Property for Future Schools

Over the years, as the City grew and developments were approved, school boards were able to obtain a site reservation on parcels of land for a potential future acquisition of property at market value. For years, vacant land was available, and a few acres was set aside and identified by a planning policy and designation for a potential school within a specific area for future student accommodation. The site would be vacant for a specific period of time and as the area grew and student accommodation increased, the school board could then acquire the land, subject to funding, for market value.

This was the case at the former Canadian Tire site situated in close proximity to the south-west corner of Leslie Street and Sheppard Avenue East. However, the large parcels of land were already reduced in size and discussions around sharing of playground space with a City park is now a requirement. At the Canadian Tire property, the City of Toronto Planning and TDSB Planning and TCDSB had worked together to secure two school sites with options to purchase at market value well into the future. Just last year, the TDSB obtained Ministry funding approval and the vacant land was acquired by the TDSB; and the Catholic Board followed with the secondary parcel.

In specific areas of the City under transition, this process may still be viable, such as in the Portlands where TLC is working with the City of Toronto in determining a site location and requirements for a potential school years away and, in essence, securing the TDSB interest for a later date, at market value. However, a few critical changes have occurred over the years that make this planning process very difficult to sustain and other options must be considered in order to meet ongoing demands for student accommodation within the City.

Issues include:

- Large tracts, three or more acres of land, are not readily available in the City of Toronto
- Land, at a premium, is very expensive, and must be funded and approved by the Ministry
- The design and plan for City building now includes large high density towers and, in many cases, only mandatory outdoor park space
- Developers simply don't have redevelopments that include large parcels of land (2-4 acres) that can be dedicated under the planning process to be set aside for a school
- Open Market process for acquisition of property does not support mandatory Ministry of Education and school board approvals. For instance, open market process has restrictive timelines, competitive offers, terms and conditions, purchase price above estimated market value appraisal reports.

### New Opportunity for Acquisition of Land for School Boards

Developers and the City realize that in order to create complete communities, a school becomes a necessity to meet the growing needs of the neighbourhood. However, with new urban designs, traditional subdivisions are being transformed with high density residential towers and green space becomes a premium for parkland for the entire community in a vertical design model. The City is unable to reserve a parcel for school board use and is unable to demand that a developer sell a portion of its assets to a school board. The only option that remains is one of collaboration between parties and the insight to develop a plan to work together to construct a school within one of the proposed new towers.

However, unlike a vacant parcel of land, a decision and agreement to include a school in the tower must be at the same time the architect is designing the building and the Developer is seeking City approvals. An agreement is required years in advance of an actual building design and still must include options for all parties to fully proceed or terminate without penalty.

TLC has already received Board approval to proceed with an agreement with the developer, Menkes, in the area of Lower Yonge area of the City, and is currently awaiting Ministry approval which is one of the conditions in the executed non-binding Memorandum of Understanding. TLC has also received authority (2020) from TLC/TDSB Boards to enter into a Memorandum of Understanding with First Capital at the former Christie (cookie factory) site to develop a school in the future. As with any real estate agreement, there remain numerous conditions that take time to come to fruition. Most important from a City of Toronto Planning perspective and the developer, the development must be able to proceed with either a school within the tower, or if this outcome is not possible, the developer will have also obtained approval to alter the use to an office/retail component. However, as TDSB has specific requirements within the design of a school, including ceiling heights (gym), TLC must ensure in negotiating a real estate agreement that there is flexibility for the protection of all parties.

Highlights of a new process:

1. TLC, Land Use Planning receives notification of a new development; or
2. Developer contacts TLC with a proposal to discuss a school integration within a proposed redevelopment;
3. TDSB confirms if there is a long term need in requiring a school within the proposed location due to future student accommodation requirements as a result of the proposed development or simply due to existing school pressures;
4. TLC meets with the Developer to determine if there is interest to proceed with incorporating a school within the tower redevelopment;
5. If the Developer is uninterested to pursue an arrangement that would include a standard school for future accommodation, there is no further real estate negotiation for a school site and TDSB must pursue other school accommodation planning within its portfolio; or
6. TLC would undertake further study and seek to create other opportunities that may include other models that may be predicated on different grade configuration (JK-3, satellite locations) versus the current standard traditional 450-550 capacity within the proposed redevelopment or in close proximity;
7. If the Developer is interested in pursuing a potential school, preliminary real estate discussions are undertaken and the developer is provided with further details on process, approvals, design requirements, playgrounds, etc.
8. TLC would then seek approval at Board to enter into authority to negotiate a non-binding agreement, conditional upon any Ministry approvals, as may be required.
9. Real Estate would negotiate, a non-binding, strata, non-condominium title acquisition
10. TLC would request final board approvals and seek Ministry approval for the transaction
11. TLC will support and request throughout the process that the developer request approval from the City of Toronto to not include the density for a new school as part of the overall approved GFA.
12. Once an MOU is executed and the process has commenced to proceed through the various conditions, real estate would also prepare a binding agreement of purchase and sale.



## **French-as-a-Second Language: Update**

**To:** Planning and Priorities Committee

**Date:** 3 November 2021

**Report No.:** 11-21-4199

### **Strategic Directions**

- Transform Student Learning
- Provide Equity of Access to Learning Opportunities for All Students
- Build Strong Relationships and Partnerships Within School Communities to Support Student Learning and Well-Being

### **Recommendation**

It is recommended that the French-as-a-Second Language: Update, as presented in this report, be received for information.

### **Background**

The French-as-a-Second Language update report details the current system context for elementary intensive French programs, specifically the implementation plans for the transition to the Junior Kindergarten entry point to Early French Immersion program (EFI).

In June 2019 staff received direction from the Board of Trustees to move forward with the implementation of the French-as-a-Second Language (FSL) Review recommendations. Over the next several years, the TDSB will continue to phase in changes and enhancements to French programs, which are all aimed at improving equity of access for students.

The phase out of Extended French and phase in of Middle French Immersion will help support the establishment of a single program model with two entry points – Junior Kindergarten French Immersion (beginning September 2022) and Grade 4 Middle French Immersion (September 2021).

As part of planned program changes, the first cohort for the Grade 4 Middle French Immersion Program (MFI) began September 2021. The following programs will also phase out entirely by June 2028: the single (1) Grade 6 Intensive Extended French Program and the fourteen (14) Grade 7 Entry Extended French programs.

At the foundation of these decisions was a commitment to ensure that access to intensive French programs was fairer and more equitable across the TDSB. Over time, the streamlining of programs will increase access to an intensive French program for students in the board, and will increase program viability, while minimizing the impact of additional staffing or need for supplementary teachers.

Given the complexities and intricacies of the TDSB system, staff recognize the need to take a careful and measured approach to ensure the needs of all French students are met.

## **Current Context**

### **Implementation Plans for Junior Kindergarten Entry to Early French Immersion Program**

Early intensity matters for students maintaining and building language proficiency; there is a higher proficiency rate when there is greater exposure to the language at the onset of the program. This model is more inclusive as it provides students with increased exposure to the French language to build both their proficiency and literacy skills in the language of instruction, and supporting their success in the subject areas taught in French. The shift to entry at JK supports improved access in various ways:

- JK entry provides parents/caregivers an opportunity to opt for and students to engage in the FI program without any preconceived notions or prejudice from the beginning of their school experience.
- biases may influence recommendations made to families as to who should or should not participate in intensive French programs, which only serves to promote systemic barriers to access
- equity of access will be improved by eliminating the influence of these biases.

An entry point at JK supports student achievement and well-being in multiple ways:

- means less transition for primary students;
- it provides an opportunity for families and students to build relationships with the school community from the beginning;
- it engages French students in deep learning and gives them an opportunity to focus on pre-literacy skills in the target language to meet the TDSB Multi-Year Strategic Plan reading and math targets for all students;
- there are lower cognitive demands in earlier starting programs and a better fit between the language level of the learner and the complexity of the language in the subject content areas;

## **Sites and Locations**

All existing Early French Immersion (EFI) [program sites](#) will transition to serve as the new Junior Kindergarten entry point to EFI. In addition, four (4) new sites have been identified proactively to prioritize underserved areas of the TDSB and reduce the largest French Immersion catchment areas to improve equitable distribution of programs across the system. Locations for these new EFI programs considered school capacity, utilization, projected enrolment over time, existing material resources, staffing efficiencies and program pathways. Program locations were identified through

the Local Feasibility Team (LFT) meeting process, which included the local area Trustee(s), Superintendents, Principals, and central staff.

Starting in September 2022, and during the online application period of November 2021, the four (4) new Early French Immersion sites listed below will be introduced at the following school locations. Maps of these new programs and their associated catchment areas can be found in Appendix A:

- Brookhaven Public School (York South-Weston – Ward 6, Trustee Tonks)
- Fraser Mustard Early Learning Academy (Don Valley West – Ward 11, Trustee Chernos Lin)
- George B Little Public School (Scarborough-Guildwood – Ward 19, Trustee Patel)
- Mason Road Junior Public School (Scarborough Southwest – Ward 18, Trustee Kandavel)

Note: All existing pathways at this time as established at the entry of each EFI program will remain as such. Changes may occur in the future in accordance with board procedures.

In addition, the following pathway changes were identified through Local Feasibility Team meetings to reduce some of the longest student commutes, and will take effect September 2022.

- Former Pathway: Millwood Junior School (SK-5) > Hilltop Middle School (6-8)  
(Etobicoke Centre – Ward 2, Trustee MacLean)
- New: Millwood Junior School (SK-5) to Bloordale Middle School (6-8)  
(Etobicoke Centre – Ward 2, Trustee MacLean)
- Former Pathway: Broadacres Junior School (SK-5) > Hilltop Middle School (6-8)  
(Etobicoke Centre – Ward 2, Trustee MacLean)
- New Pathway: Broadacres Junior School (SK-5) > Bloordale Middle School (6-8)  
(Etobicoke Centre – Ward 2, Trustee MacLean)
- Former Pathway: Corvette Junior Public School (SK-6) > Tredway Woodsworth Public School (7-8)  
(Scarborough Southwest – Ward 18, Trustee Kandavel) > (Scarborough Guildwood, Ward 19, Trustee Patel)
- New Pathway: Corvette Junior Public School (SK-6) > Robert Service Senior Public Senior (7-8)  
(Scarborough Southwest – Ward 18, Trustee Kandavel)

Note: All existing secondary pathways at this time as established at the entry of each EFI program will remain as such. Changes may occur in the future in accordance with board procedures.

The potential redistribution of Early French Immersion sites was explored, and areas of higher and lower density of EFI programs across the system were identified, catchment sizes and travel distances were analyzed, application rates were reviewed.



The closure of highly subscribed programs within well utilized schools presented their own challenges. The consolidation of programs in facilities that are full or situated on small sites is not a feasible option. Closing programs in these areas will place further accommodation pressures on these schools that would then need to be addressed.

Further, creating French Immersion centres by removing or closing the regular track program requires a lengthy process such as Pupil Accommodation Review, and often increases the distance that students must travel to access an EFI site. French Immersion centres provide opportunities for larger enrolments, as meaning the catchment area is usually larger. Consequently, this approach does not always improve equity of access to EFI programs and risks removing access to a walkable neighbourhood regular track school.

Therefore, in the short-term, to improve accessibility to French programs, the opening of new sites was prioritized in underserved areas. Moving forward, staff will achieve efficiencies as opportunities present themselves annually through thorough ongoing discussions in yearly Long-Term Program and Accommodation Strategy meetings, and in accordance with Operational Procedure PR597. As examples, there are two planned studies this school year that will be exploring access and pathways to secondary French programs. These studies emerged from the Long-Term Program and Accommodation Strategy and Secondary Program review discussions with Trustees.

### **Application and Placement Process**

The system-wide Early French Immersion program will continue to be overseen by the central French Department. The entry point to Early French Immersion is currently Senior Kindergarten. However, as per recommendations approved at the Board in June 2019, the entry point will change to Junior Kindergarten for September 2022. There will be one transition year wherein students who will be entering Junior Kindergarten and Senior Kindergarten in 2022 will be eligible to apply to the Early French Immersion program during the November 2021 application period. Moving forward (2023), the only entry point for Early French Immersion will be Junior Kindergarten.

Applications to the seventy-four (74) EFI programs will continue to be an entirely online process. Interested applicants may visit the application site [www.tdsb.on.ca/pars](http://www.tdsb.on.ca/pars) during the application period which will commence in November 2021. The application period as well as virtual information sessions, an information package, and other communications noted below will be publicized to all parents/caregivers well in advance and will be posted on the public TDSB website at the following link: [www.tdsb.on.ca/Elementary-School/School-Choices/French-Programs](http://www.tdsb.on.ca/Elementary-School/School-Choices/French-Programs)

While admission to the EFI program is guaranteed at the entry points to all on-time applicants, admission to a specific school is not guaranteed. Every effort will be made to place students in the school identified as their area EFI school, however this is not always possible. In cases where the number of applications in a given area is greater than the number of allotted program spaces in the school, students may be redirected to schools with available program space. The number of allotted program spaces will align with staff direction to achieve efficiencies by organizing EFI programs more optimally. Every effort will be made to support the successful rollout of the JK entry in all 74



sites. Placements are made based on the child's primary home address of record prior to the application deadline. If the address changes between the application deadline and the fall of the Kindergarten year, there is no guarantee of placement in the new area. Changes may occur in the future in accordance with board procedures.

## **Communication Plans**

Information on the EFI and location sites will be shared with the public and the TDSB community through regular channels of communication including TDSB Connects, the Board website, French Resources for Families google site and inserts for school newsletters.

In addition, the Central French Department staff will host three virtual information sessions prior to the close of the application period in November with differentiated support in the form of sessions particularly for communities with historically lower uptake hosted at new location sites. An extensive information package and public information video will be made available to all parents/caregivers and the TDSB community through regular channels of communication.

The week of August 30, EFI announcement banners went out to all schools with Kindergarten. An EFI flyer, translated into 22 languages, is available on [www.tdsb.on.ca/French](http://www.tdsb.on.ca/French). An extensive digital advertising and printed media campaign targeting families with children born in 2017 and 2018 who will be JK/SK students in 2022 is planned along with print ads that will appear in local community print publications, some in local community languages.

Communications are being developed specifically for school Administrators, Superintendents, Trustees, and other staff. Avenues of communication like Direct Line, System Leaders Weekly, Trustee Weekly, TDSB French Google Site, Academic Workspace and the French Currents Communities will be leveraged to ensure staff is kept informed as the transition process rolls out.

## **Professional Learning Plan**

The Professional Learning Plan for the 2021/2022 school year will include sessions designed to address the transition from the Senior Kindergarten to the Junior Kindergarten entry. These sessions will be offered in a variety of modalities and to specific audiences:

- professional learning for educators/administrators focusing best practices in the early years for play-based learning and inquiry-based learning with a French context;
- sessions for experienced EFI Kindergarten teachers acknowledging and preparing for the different implications of welcoming JK students relative to SK students only;
- virtual or in-person sessions on oral language and a comprehensive literacy program;
- online communities to facilitate sharing of best practices, questions and ideas as the transition rolls out;
- Learning Centre based networks for EFI teachers.

### **Action Plan and Associated Timeline**

Subject to the Planning and Priorities Committee's receipt, the report will be provided to the Board of Trustees on November 10 for information.

### **Resource Implications**

No additional resources are required at this time.

### **Communications Considerations**

The French public website will contain information on the Implementation phases including updated reports as approved at Board Meetings, and related Fact Sheets to support the transition of entry point to Early French Immersion.

### **Board Policy and Procedure Reference(s)**

- French-as-a-Second Language Programs (P080)
- Operational Procedure, French Immersion/Extended French (PR597)

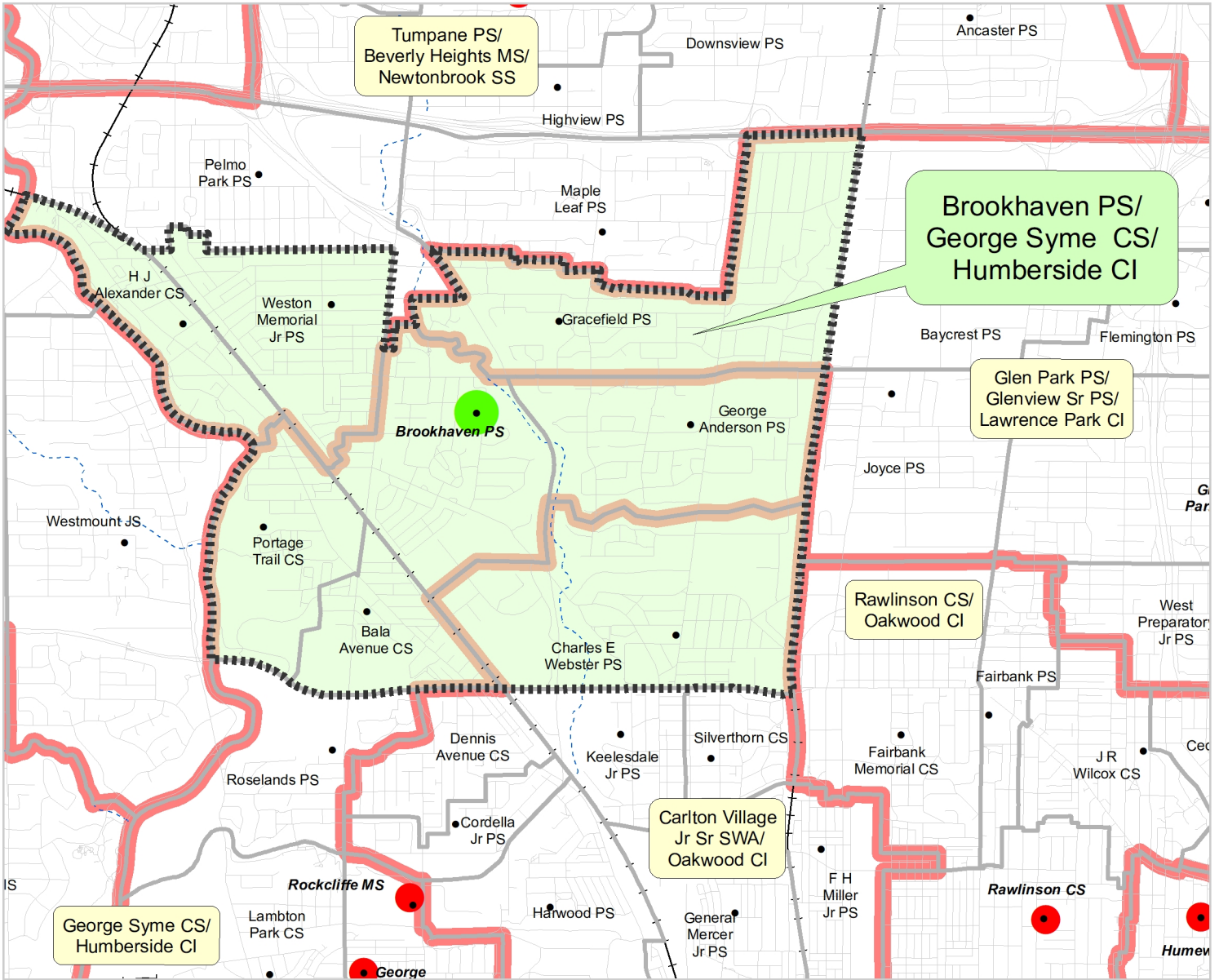
### **Appendices**

- Appendix A: Maps New Early French Immersion Sites

### **From**

Linda Curtis, Associate Director – Equity, Well-being and School Improvement (Acting), by email at [linda.curtis@tdsb.on.ca](mailto:linda.curtis@tdsb.on.ca) or by phone at 416-397-3187.

Angela Caccamo, Centrally Assigned Principal – French Programs, Classical and International Languages (K-12), by email at [angela.caccamo@tdsb.on.ca](mailto:angela.caccamo@tdsb.on.ca) or by phone at 416-396-7992.

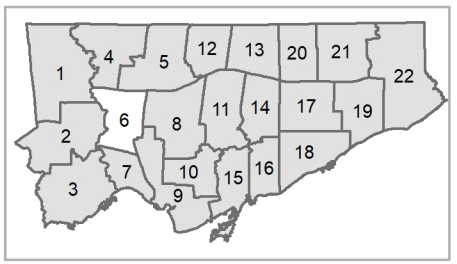


Please note:  
The lines on this map representing the Attendance Areas are approximate.  
For specific information on designated schools to serve individual addresses, please consult the TDSB Street Guide.

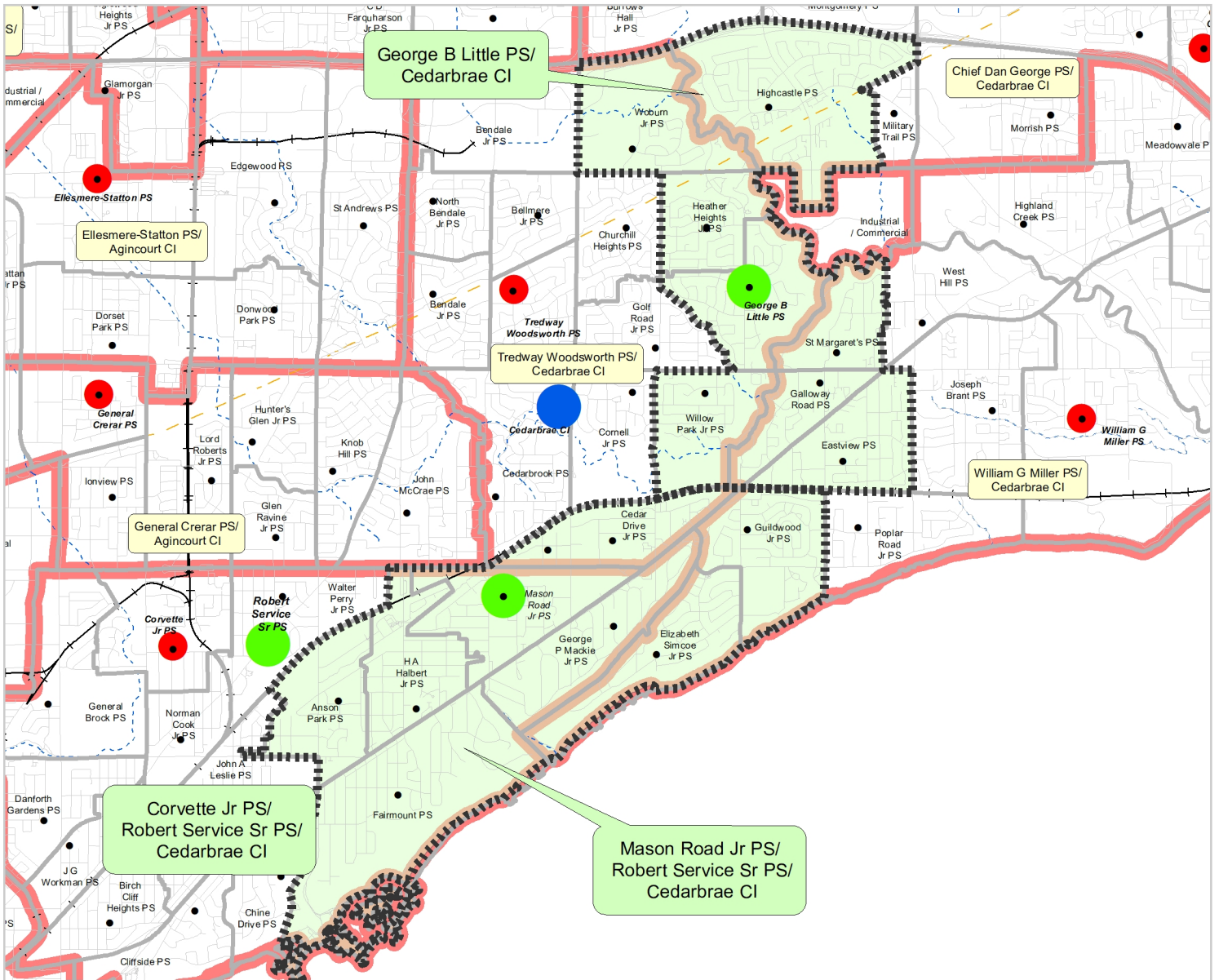
0 0.25 0.5 1 1.5 2 km

Produced by:  
Strategy and Planning  
October 2021  
Source:  
Base Map - Geospatial Competency Centre  
Facility - Strategy and Planning, TDSB  
Data - City of Toronto

- Elementary School
- Existing EFI Elementary Site
- Existing EFI Secondary Site
- New EFI Site
- Junior Attendance Area 2020-2021 EFI
- Attendance Area
- New EFI Attendance Area
- Road
- Railway
- Utility line
- Waterway



# New Early French Immersion Programs: George B Little PS, Mason Road Jr PS and Robert Service Sr PS

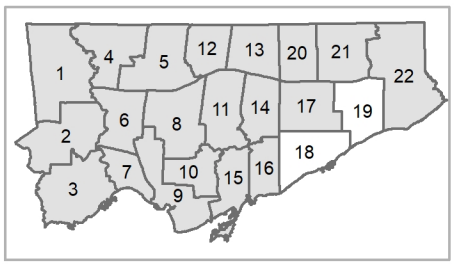


**Please note:**  
The lines on this map representing the Attendance Areas are approximate. For specific information on designated schools to serve individual addresses, please consult the TDSB Street Guide.

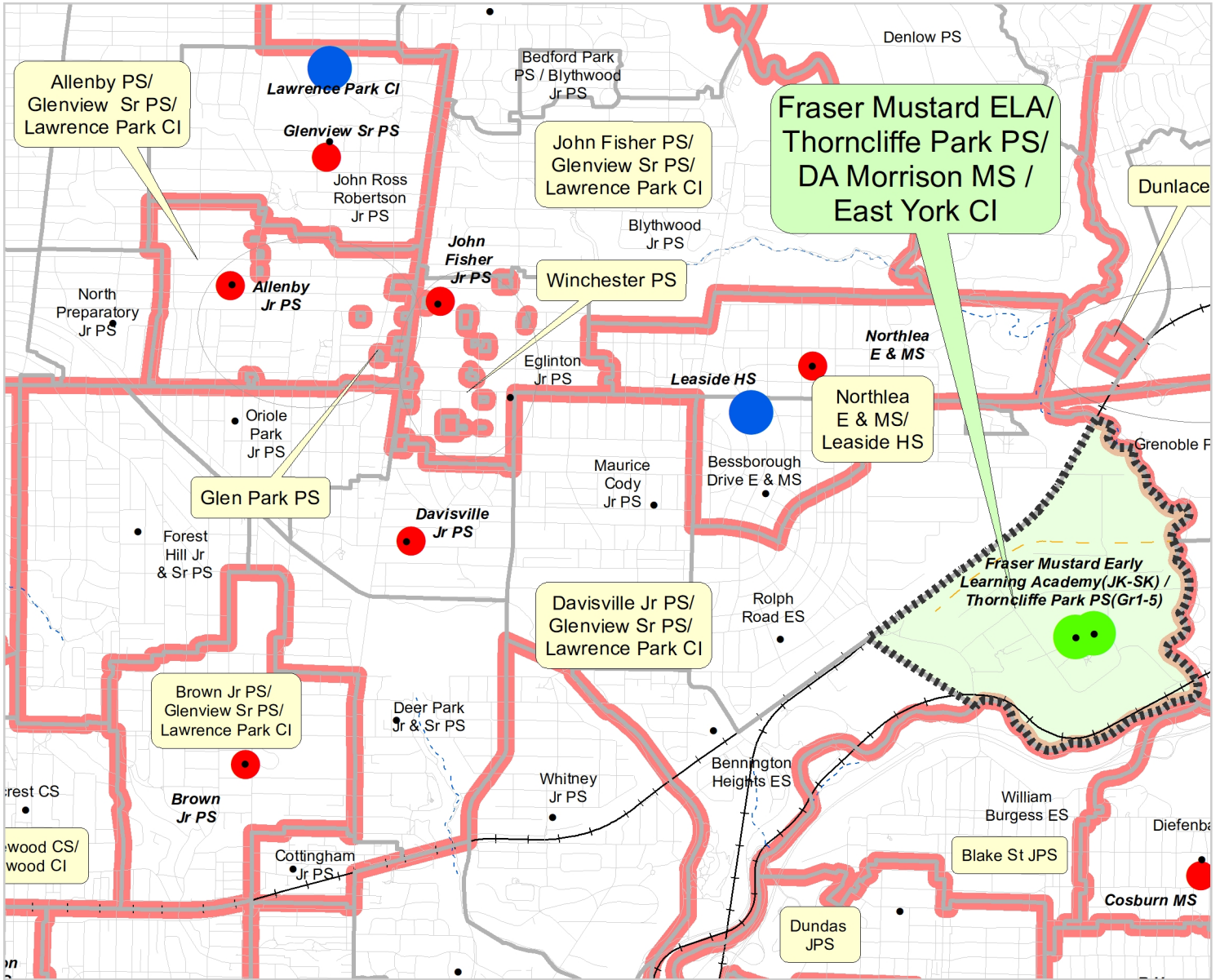
0 0.4 0.8 1.6 2.4 3.2 km

Produced by:  
Strategy and Planning  
October 2021  
Source:  
Base Map- Geospatial Competency Centre  
Facility - Strategy and Planning, TDSB  
Data- City of Toronto

- Elementary School
- Existing EFI Elementary Site
- Existing EFI Secondary Site
- New EFI Site
- Junior Attendance Area 2020-2021 EFI
- Attendance Area New EFI Attendance Area
- Road
- Railway
- Utility line
- Waterway



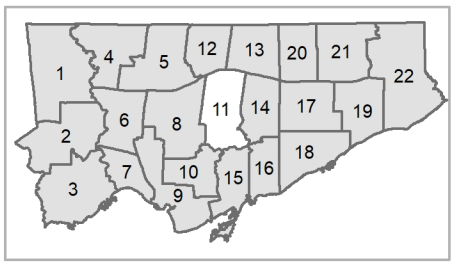




**Please note:**  
The lines on this map representing the Attendance Areas are approximate. For specific information on designated schools to serve individual addresses, please consult the TDSB Street Guide.

Produced by:  
Strategy and Planning  
October 2021  
Source:  
Base Map- Geospatial Competency Centre  
Facility - Strategy and Planning, TDSB  
Data- City of Toronto

- Elementary School
- Existing EFI Elementary Site
- Existing EFI Secondary Site
- New EFI Site
- Junior Attendance Area
- 2020-2021 EFI Attendance Area
- New EFI Attendance Area
- Road
- Railway
- Utility line
- Waterway



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## Making School Buildings and Sites More Accessible

**To:** Planning and Priorities Committee

**Date:** 3 November, 2021

**Report No.:** 11-21-4173

### Strategic Directions

- Provide Equity of Access to Learning Opportunities for All Students
- Allocate Human and Financial Resources Strategically to Support Student Needs

### Recommendation

It is recommended that:

1. The Chair of the Board write to the Minister of Education to advocate for dedicated funding to make existing schools accessible.
2. The Director:
  - a. Seek permission from the Ministry of Education to use Proceeds of Disposition (PoD) for accessibility improvements to buildings and sites;
  - b. Instruct an interdepartmental team to develop a plan for making improvements to existing designated schools and to increase the network of designated schools across the district; and
  - c. Include a request for PoD to fund the implementation of the plan in the Capital Budget presented to the Board in June 2022, subject to Ministry approval.

### Context

To meet our commitment to human rights, equity, and inclusion, and to honour the Canadian Human Rights Act, the TDSB is obligated to improve accessibility for people with disabilities. While acknowledging that accessibility has many definitions and dimensions, this report focuses on the built environment, which includes the interior and exterior features of schools.

While all new TDSB schools are designed to meet or exceed current accessibility standards, most of our older schools were not built with accessibility in mind. These sites include significant barriers to students, educators, parents, and visitors with disabilities, including those who use mobility assistance devices and who have low vision or hearing.

### ***How Accessible are TDSB Schools?***



In 2014 and 2015, the TDSB audited all of its schools and created site-specific profiles. Each school profile includes a description of interior and exterior accessibility features and a map. For an example and more information, see *Appendix A: Site-Specific Accessibility Profiles*.

The on-site accessibility audits of school buildings have also allowed staff to group schools into three categories: accessible, somewhat accessible, and not accessible.

3. **Accessible** means the building meets objective design parameters specific to the TDSB. A building meeting this level would allow independent access into and throughout the building and provide a barrier-free washroom.
4. A **Somewhat Accessible** building is one that doesn't meet the full criteria of Accessible but provides independent access into the building, a barrier-free washroom on the level of entry, and a level of entry with no level disruptions.
5. Those buildings not meeting either Accessible or Somewhat Accessible defaulted to the **Not Accessible** category.

As shown in appendices B, C and D, 160 buildings have been categorized as accessible, 78 as somewhat accessible and 332 as not accessible.

### ***Funding and Accessibility***

There are two challenges associated with funding and accessibility:

- the amount of funding needed, and
- kind of funding the TDSB receives.

The first challenge is the magnitude of funds needed given the complexity of work often required. Based on the information collected during the on-site audits, staff estimate that \$1 billion will be needed to make all schools accessible.

The cost to make Maplewood High School fully accessible, for example, was \$5 million and took two years of construction. The cost to provide accessibility to most, but not all, spaces at The Elms Junior Middle School was \$1.3 million and took one and a half years to complete. For more information on these projects, see *Appendix E: Case Studies*.

The second challenge is the nature of the funding that the TDSB receives from the Ministry of Education. Accessibility is improved in the following circumstances:

1. All new schools and additions must meet the accessibility requirements of the Ontario Building Code (OBC) and the Accessibility for Ontarians with Disabilities Act (AODA). The Ministry provides the funding to meet these requirements, and as a result, all new TDSB schools and additions are accessible. For more information on the OBC and AODA, see *Appendix F: Legislation and Regulations*.

2. When school buildings and sites are renovated as part of Renewal or State of Good Repair projects. These projects are primarily funded from School Condition Index (SCI) funding, which is to be used to repair and replace building and site components that are recorded as part of the TDSB's \$3.7 billion Repair Backlog. For example, when a parking lot is being replaced, accessible parking spaces are included, as well as an accessible path of travel from the parking lot to the doors of the school.

While accessibility improvements are regularly made, projects are selected based on the priorities identified in the Repair Backlog, not by considerations related to systematic inequities in accessibility.

A related constraint is that SCI funding cannot be used to improve accessibility if the space is not listed in the Repair Backlog. For example, there are frequent requests for ramps and elevators, but if they don't exist, then SCI funding cannot be used to install them.

While provincial funding for new schools and additions allows the TDSB to meet the requirements of the OBC and AODA, and SCI funding can help make important accessibility improvements on an ad-hoc basis as part of State of Good Repair projects, there is no dedicated funding from the Ministry for school boards to plan and execute a program of accessibility upgrades to buildings and sites.

The only feasible option to improve accessibility in existing buildings methodically would be for the TDSB to request permission from the Ministry of Education to use Proceeds of Disposition (PoD). In doing so, staff will be able to design and implement planned accessibility projects based on identified priorities.

But even if permission to use PoD is granted, difficult choices about priorities will have to be made because of the high cost of making even one school accessible, let alone the \$1 billion required to meet all needs.

### ***Accessibility and Replacement Schools***

Adding to the complexity is that some schools simply cannot be made accessible because the renovations required would be extreme in both extent and cost. Often these are the same buildings that have repair backlogs that exceed their replacement value.

Replacing these schools may be the best option, since it would eliminate the repair backlog and result in buildings that meet today's accessibility standards. This is particularly important for secondary schools because of the way that students need to move through the building to have equitable access to available programs.

### ***Improving the Accessibility of Existing Schools***

## ***Designated Schools***

The TDSB has had a network of designated schools (as shown in Appendix G) for about twenty years. “Designated schools” is a term used to describe schools that have been designated for students with accessibility needs.

In most cases, the designated schools are classified as Accessible, but because some areas do not have accessible facilities, some building are not fully accessible.

Over the years, investments have been made into designated schools to meet the needs of the students enrolled, which often include features needed by students but not required by the OBC or AODA. For example, students may need special desks, or modifications to washrooms that, while barrier-free for adults as required by the OBC, do not meet the needs of children.

Since PoD for accessibility will be limited, available funding should be directed strategically into improving existing designated schools and to gradually increase the number of sites with this designation so that there are more pathways for students as they move through the school system.

To this end, an interdepartmental team with representation from the Learning Networks, Special Education, and Planning and Facility Services will be brought together to help plan and guide a program of improvements to strengthen the network of designated schools across the district.

## **Action Plan and Associated Timeline**

An interdepartmental team will develop a plan to improve the accessibility and present a budget request for PoD to support the plan in the June 2022 Capital Budget report

Upon approval of the funding, detailed design development will commence, to be followed by the tendering of projects and construction in the 2022/23 school year.

## **Resource Implications**

Existing staff resources will be used to develop the plan.

## **Communications Considerations**

N/A

## **Board Policy and Procedure Reference(s)**

Policy P069 – Accessibility

## **Appendices**

- Appendix A: Site Specific Accessibility Profiles
- Appendix B: Accessible Schools
- Appendix C: Somewhat Accessible Schools
- Appendix D: Not Accessible Schools
- Appendix E: Case Studies
- Appendix F: Legislation and Regulations
- Appendix G: Designated Schools

**From**

Maia Puccetti, Executive Officer, Facility Services at [Maia.Puccetti@tdsb.on.ca](mailto:Maia.Puccetti@tdsb.on.ca) or at 416-393-8780.

Richard Christie, Senior Manager, Sustainability at [Richard.Christie@tdsb.on.ca](mailto:Richard.Christie@tdsb.on.ca) or at 416-396-8554.



# Accessibility: Features and Barriers

## Earl Haig Secondary School

100 Princess Ave., North York, ON M2N 3R7

(416) 395-3210

Accessibility survey date: June 2014



For TDSB staff only: summary,  
site plan, and floor plans

### Introduction

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The information provided below is based on a survey of Earl Haig SS conducted in June 2014 and is for reference only. All visitors to the school should contact the main office in advance to verify access and arrange for necessary accommodations.

Earl Haig SS has been designated Accessible. For definitions of designations and instructions on how to use the accessibility drawings attached, please see page 9.

### Summary

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Earl Haig SS has numerous amenities that enable accessibility to most parts of the building. All entrances are level and three are equipped with power-operated doors. All floors are accessible by elevators. Keys are required for the elevators and washrooms. Visitors should obtain keys from the main office or arrange to have the washrooms unlocked.

### Exterior

---

**Parking:** Two designated parking spaces available with easy access to school entrance.

**Pathways:** Most exterior routes are accessible, with no obstructions.

**Entrances:** #1, #7 and #10 are equipped with power-operated doors; entrance # 7, located at the rear of the school, is the designated drop-off area.



# Accessibility: Features and Barriers

## Interior

---

**Floor Access:** This school contains two elevators allowing access to all floors. These elevators require key access.

### Specialized Rooms:

**Main Office:** Somewhat accessible; no power-operated door.

**Library:** Somewhat accessible; no power-operated door.

**Cafeteria:** Somewhat accessible; no power-operated door.

**General Purpose/Gymnasium:** Somewhat accessible; no power-operated door.

**Auditorium:** Accessible; power-operated door is located at the end of the ramp.

**Pool:** N/A.

**Washrooms:** School is equipped with eleven accessible washrooms. Two are designated universal washrooms that are locked. There are no visual emergency alarm devices.

## Other Information

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- There are special markers on the main stairs for visually impaired users.

## Contents

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Legend	3
Site Plan	4
Basement Floor	5
1st Floor	6
2nd Floor	7
3rd Floor	8
Using the Accessibility Drawings	9
Accessibility Definitions	11



# Accessibility: Features and Barriers

## Legend



**Exterior door:** entrance numbers on a square yellow sign.



**Intercom:** electrical device that allows two-way communication with the main office.



**Level entrance:** entrance without stairs/steps.



**Stepped entrance:** entrance with stairs/steps.



**Area of safe refuge:** location in a building for disabled occupants to go during a fire alarm as part of the evacuation process.



**Doorway**



**Elevator/lift**



**Recommended washroom (male/female) for disabled individuals**



**Power-operated door**



**Ramp**



**Stairs**



**Recommended pathway for disabled individuals. Power-operated door may or may not be present.**



**Embedded photo:** click this icon on the drawing to view a photo of the area.



**Floor level accessible by steps or stair.**



**Various instructional administrative service rooms.**



**Main entrance**

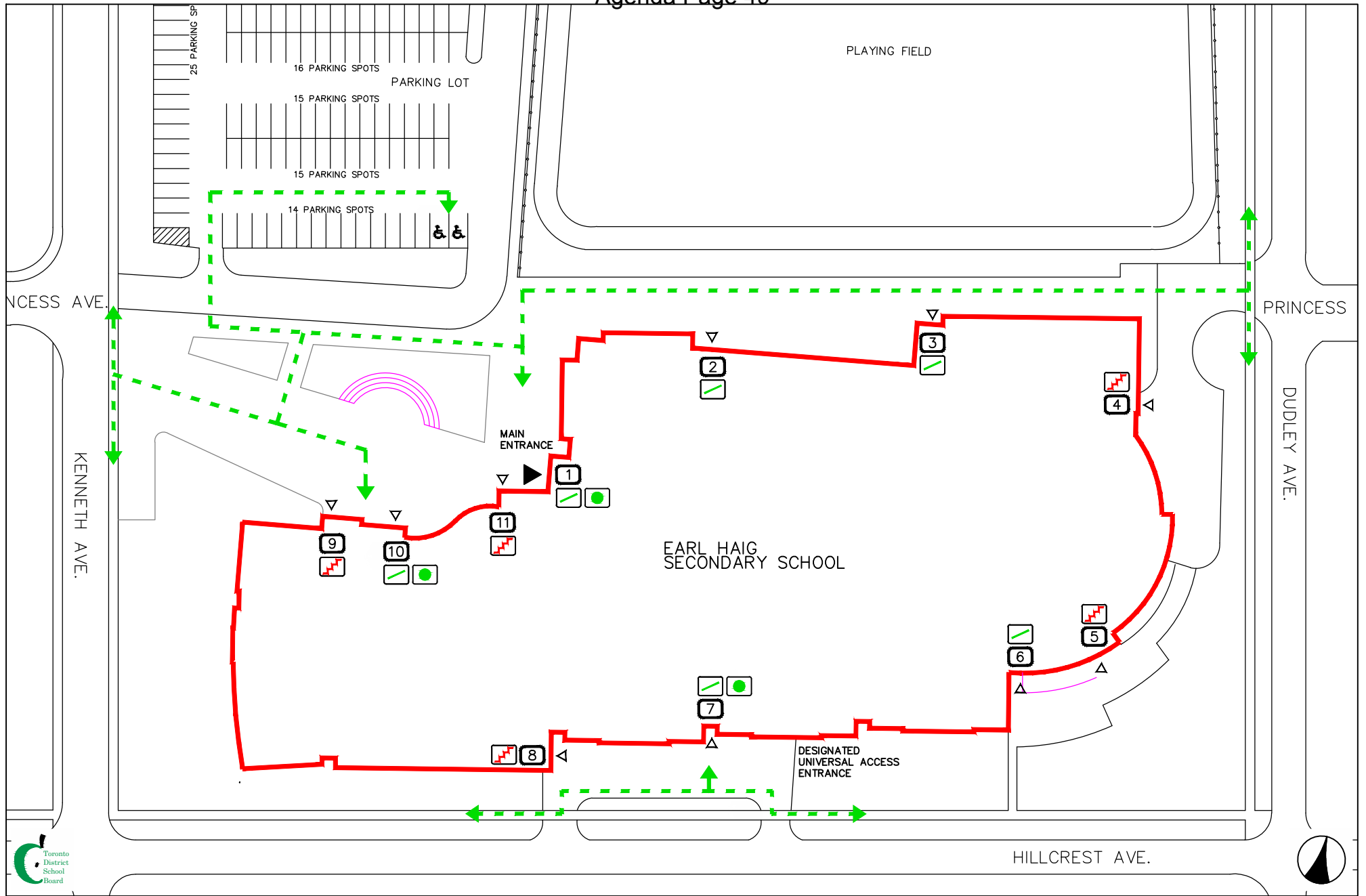


**Accessible parking**



**Bus stop**





Facility  
**Earl Haig Secondary School**

Address  
 100 Princess Avenue  
 North York

M2N 3R7

Sheet Title  
 Site  
 Accessibility Plan

Facility #

0112

Last Update

2014-12-15

Legend

XX EXTERIOR DOOR LABEL

▼ MAIN ENTRANCE

▽ EXTERIOR DOOR

✓ LEVEL ENTRANCE

⏏ STEPPED ENTRANCE

● DOOR OPERATOR

➡ RECOMMENDED PATH (DIRECTION)

☎ INTERCOM

🗨 EMBEDDED PHOTO

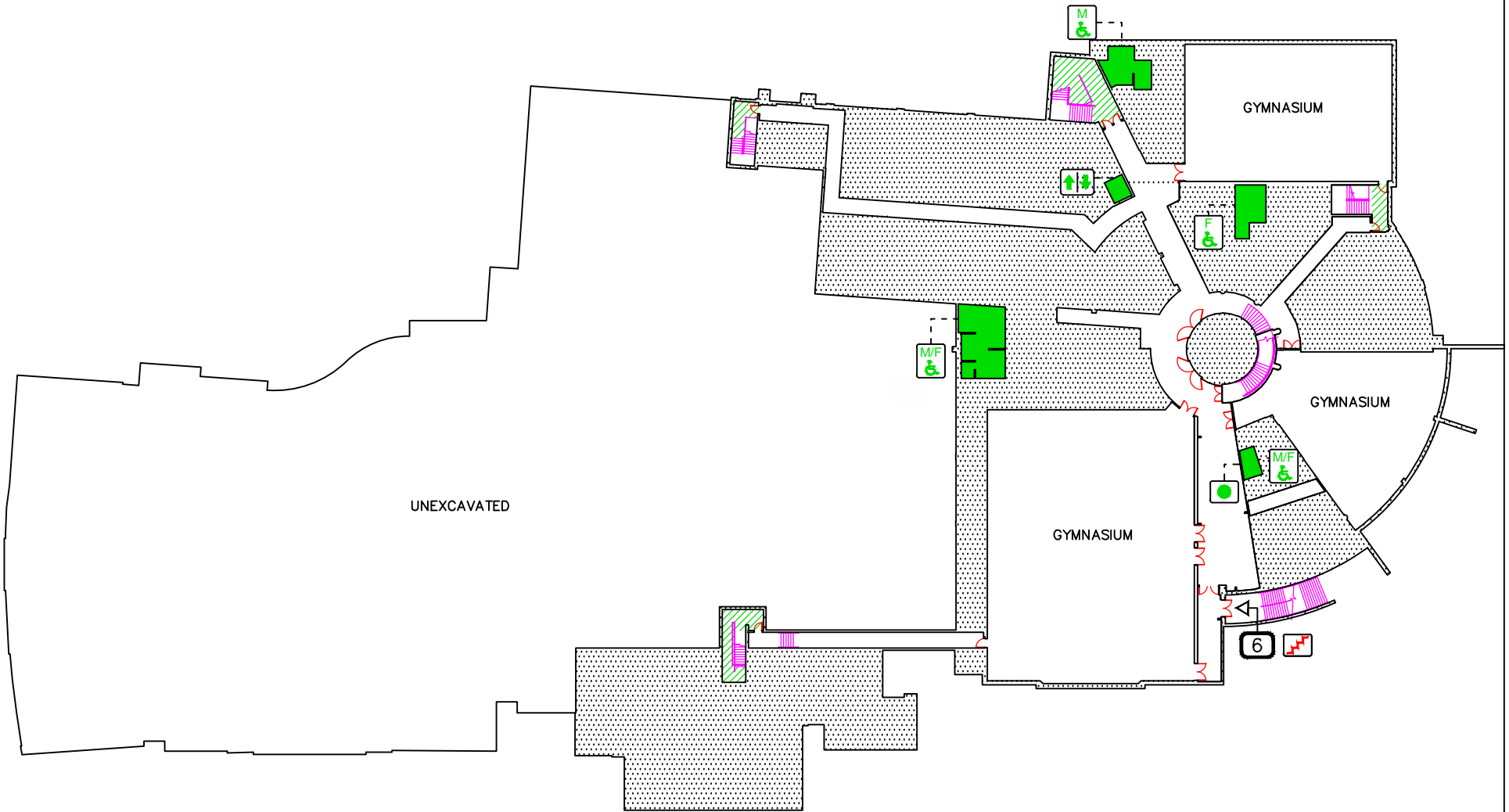
Ⓡ BUS STOP

♿ ACCESSIBLE PARKING

📏 RAMP

🪜 STAIRS

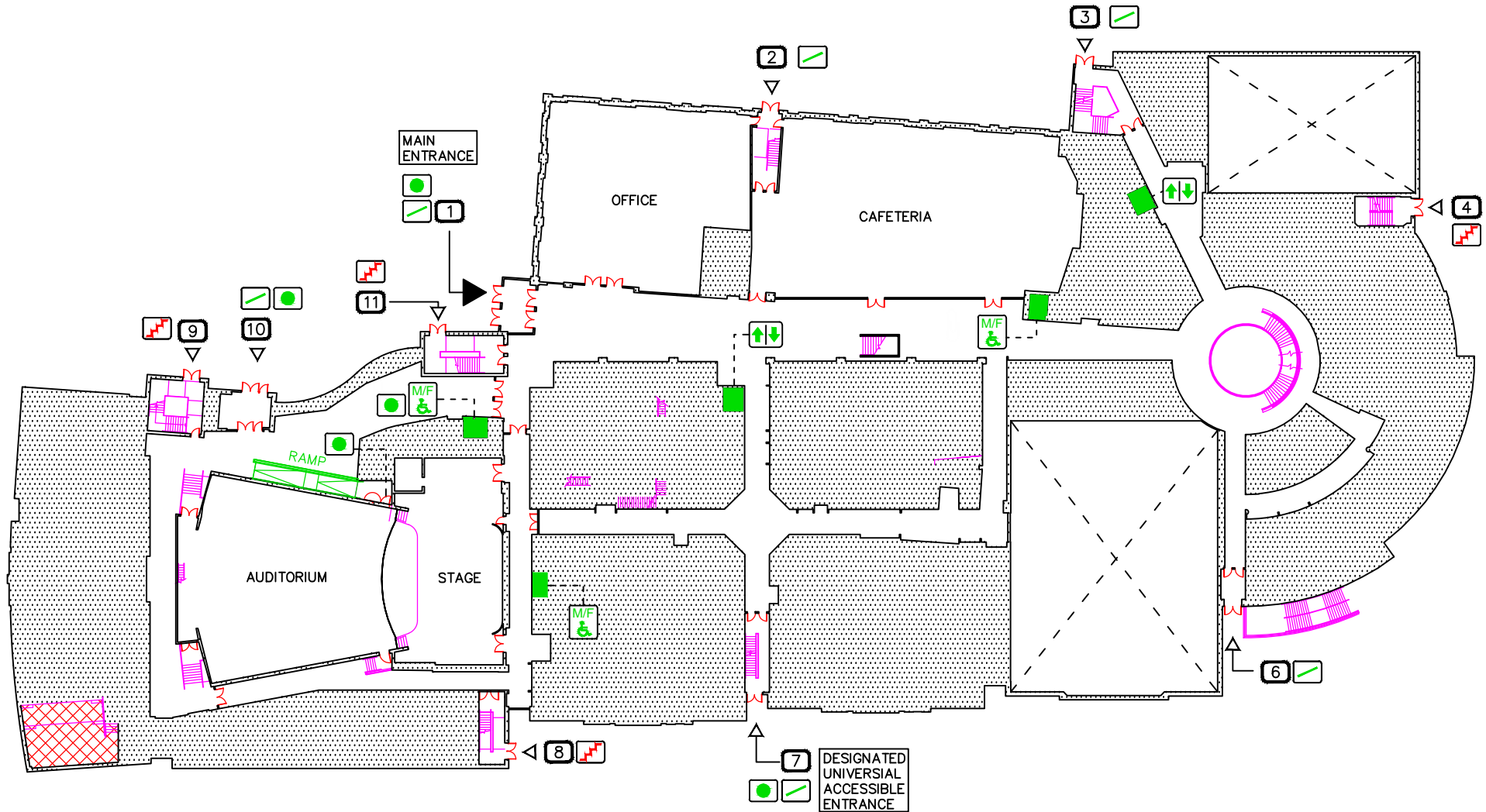
**Page 4 of 11**



- AREA OF SAFE REFUGE
- AREA ACCESSIBLE BY MEANS OF STEPS/STAIRS
- VARIOUS INSTRUCTIONAL, ADMIN. AND SERVICE ROOMS



Facility <h2 style="margin: 0;">Earl Haig Secondary School</h2>		Facility # 0112	Legend				
Address 100 Princess Avenue North York		Last Update 2014-12-15	EXTERIOR DOOR LABEL	LEVEL ENTRANCE	DOORS	RECOMMENDED WASHROOM (MALE/FEMALE)	RAMP
Sheet Title Basement Accessibility Plan	M2N 3R7	MAIN ENTRANCE	STEPPED ENTRANCE	ELEVATOR/LIFT	EMBEDDED PHOTO	STAIRS	<b>Page 5 of 11</b>

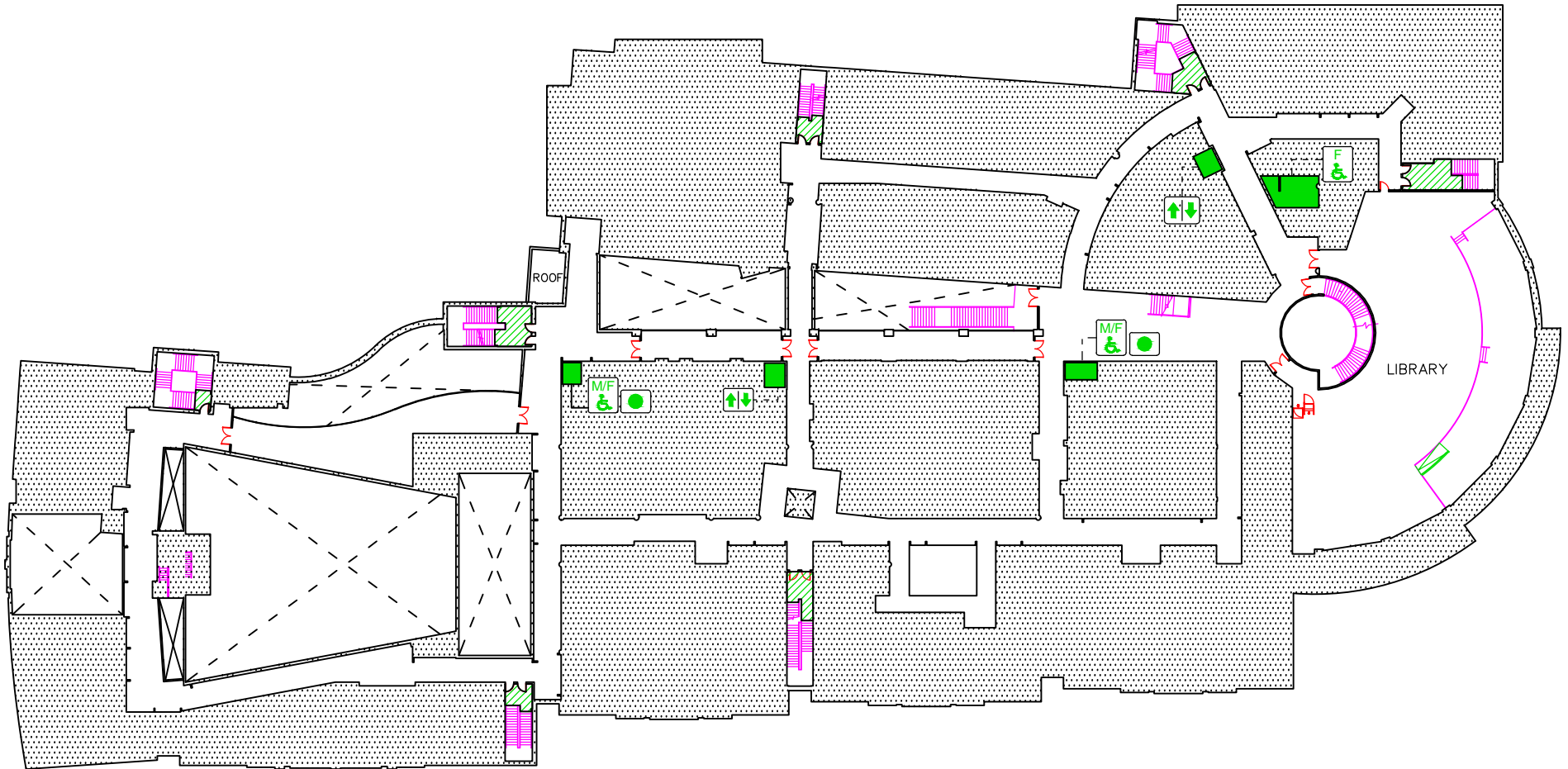


AREA OF SAFE REFUGE
  AREA ACCESSIBLE BY MEANS OF STEPS/STAIRS
  VARIOUS INSTRUCTIONAL, ADMIN. AND SERVICE ROOMS



Facility <h2 style="margin: 0;">Earl Haig Secondary School</h2>		Facility # 0112
Address 100 Princess Avenue North York	Sheet Title 1st Floor Accessibility Plan	Last Update 2014-12-15
M2N 3R7		

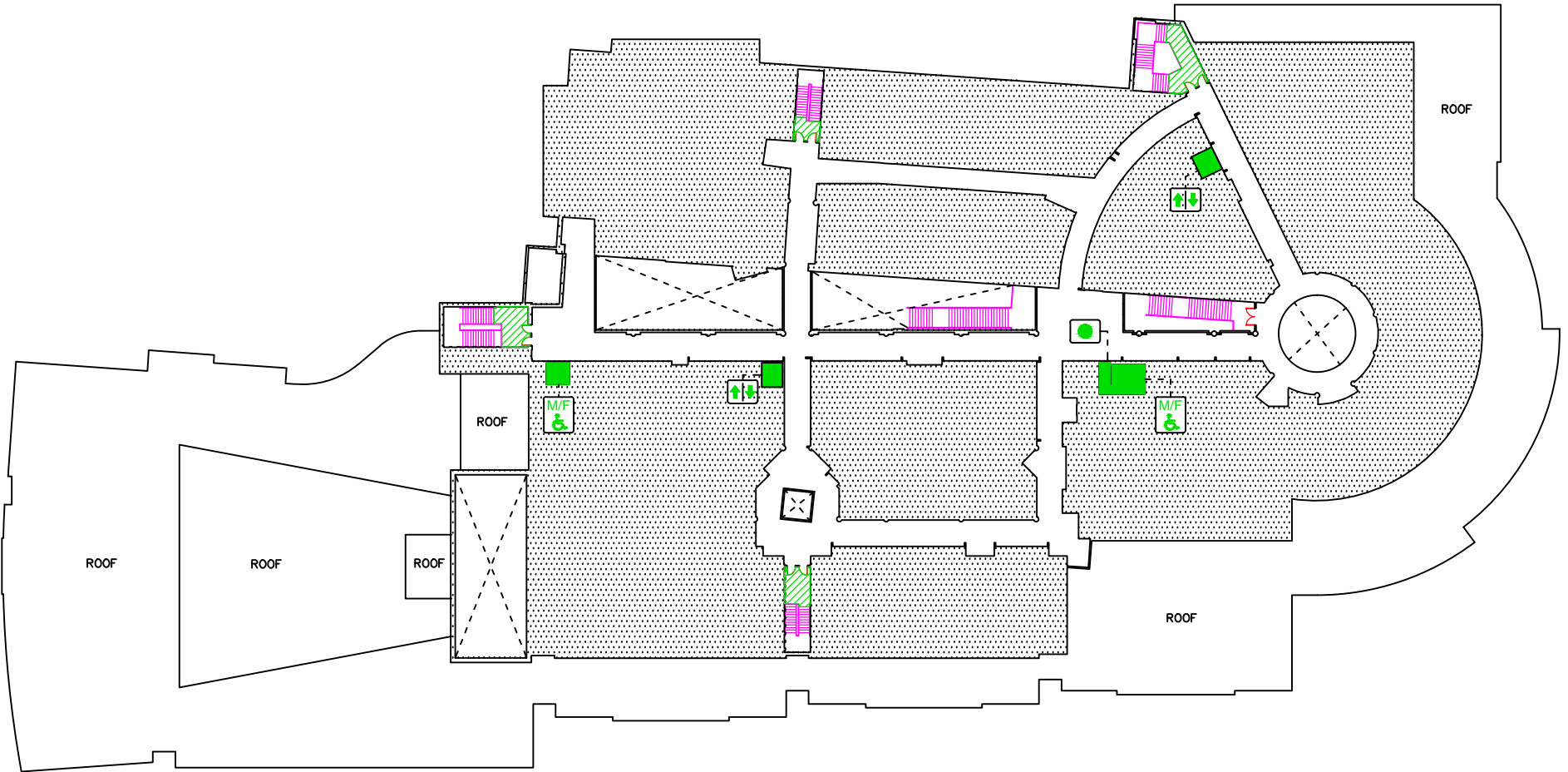
Legend			
<span style="border: 1px solid black; padding: 2px;">XX</span> EXTERIOR DOOR LABEL	<span style="display: inline-block; width: 15px; height: 10px; border: 1px solid green; background-color: #e0ffe0;"></span> LEVEL ENTRANCE	<span style="color: red;">⌒</span> DOORS	<span style="display: inline-block; width: 15px; height: 10px; border: 1px solid green; background-color: #e0ffe0; transform: rotate(45deg);"></span> RAMP
<span style="display: inline-block; width: 15px; height: 10px; background-color: black;"></span> MAIN ENTRANCE	<span style="display: inline-block; width: 15px; height: 10px; border: 1px solid red; background-color: #ffe0e0;"></span> STEPPED ENTRANCE	<span style="display: inline-block; width: 15px; height: 10px; border: 1px solid green; background-color: #e0ffe0; text-align: center;">↑↓</span> ELEVATOR/LIFT	<span style="display: inline-block; width: 15px; height: 10px; border: 1px solid pink; background-color: #ffe0ffe0;"></span> STAIRS
<span style="display: inline-block; width: 15px; height: 10px; border: 1px solid black; background-color: white;"></span> EXTERIOR DOOR	<span style="display: inline-block; width: 15px; height: 10px; border: 1px solid green; border-radius: 50%; background-color: #e0ffe0;"></span> DOOR OPERATOR	<span style="display: inline-block; width: 15px; height: 10px; background-color: yellow;"></span> EMBEDDED PHOTO	<span style="display: inline-block; width: 15px; height: 10px; border: 1px solid green; border-radius: 50%; background-color: #e0ffe0; text-align: center;">M/F ♿</span> RECOMMENDED WASHROOM (MALE/FEMALE)



AREA OF SAFE REFUGE
  AREA ACCESSIBLE BY MEANS OF STEPS/STAIRS
  VARIOUS INSTRUCTIONAL, ADMIN. AND SERVICE ROOMS



Facility <h2 style="margin: 0;">Earl Haig Secondary School</h2>		Facility # 0112	Legend				
Address 100 Princess Avenue North York		Last Update 2014-12-15	<span style="display: inline-block; width: 15px; height: 10px; border: 1px solid black; background: repeating-linear-gradient(-45deg, transparent, transparent 2px, black 2px, black 4px);"></span> EXTERIOR DOOR LABEL	<span style="display: inline-block; width: 15px; height: 10px; border: 1px solid green; background: repeating-linear-gradient(45deg, transparent, transparent 2px, green 2px, green 4px);"></span> LEVEL ENTRANCE	<span style="display: inline-block; width: 15px; height: 10px; border: 1px solid red; background: repeating-linear-gradient(-45deg, transparent, transparent 2px, red 2px, red 4px);"></span> DOORS	<span style="display: inline-block; width: 15px; height: 10px; border: 1px solid green; background: repeating-linear-gradient(45deg, transparent, transparent 2px, green 2px, green 4px);"></span> RECOMMENDED WASHROOM (MALE/FEMALE)	<span style="display: inline-block; width: 15px; height: 10px; border: 1px solid green; background: repeating-linear-gradient(-45deg, transparent, transparent 2px, green 2px, green 4px);"></span> RAMP
Sheet Title 2nd Floor Accessibility Plan		<span style="display: inline-block; width: 15px; height: 10px; background: radial-gradient(circle, black 1px, transparent 1px); background-size: 3px 3px;"></span> EXTERIOR DOOR	<span style="display: inline-block; width: 15px; height: 10px; border: 1px solid red; background: repeating-linear-gradient(-45deg, transparent, transparent 2px, red 2px, red 4px);"></span> STEPPED ENTRANCE	<span style="display: inline-block; width: 15px; height: 10px; border: 1px solid green; background: repeating-linear-gradient(45deg, transparent, transparent 2px, green 2px, green 4px);"></span> ELEVATOR/LIFT	<span style="display: inline-block; width: 15px; height: 10px; border: 1px solid green; background: repeating-linear-gradient(-45deg, transparent, transparent 2px, green 2px, green 4px);"></span> DOOR OPERATOR	<span style="display: inline-block; width: 15px; height: 10px; border: 1px solid green; background: repeating-linear-gradient(45deg, transparent, transparent 2px, green 2px, green 4px);"></span> EMBEDDED PHOTO	<span style="display: inline-block; width: 15px; height: 10px; border: 1px solid pink; background: repeating-linear-gradient(-45deg, transparent, transparent 2px, pink 2px, pink 4px);"></span> STAIRS
M2N 3R7		Page 7 of 11					



AREA OF SAFE REFUGE    
 AREA ACCESSIBLE BY MEANS OF STEPS/STAIRS    
 VARIOUS INSTRUCTIONAL, ADMIN. AND SERVICE ROOMS



Facility  
**Earl Haig Secondary School**

Facility #  
 0112

Address  
 100 Princess Avenue  
 North York

M2N 3R7

Sheet Title  
 3rd Floor  
 Accessibility Plan

Last Update  
 2014-12-15

Legend

- EXTERIOR DOOR LABEL
- LEVEL ENTRANCE
- DOORS
- RECOMMENDED WASHROOM (MALE/FEMALE)
- RAMP
- MAIN ENTRANCE
- STEPPED ENTRANCE
- ELEVATOR/LIFT
- STAIRS
- EXTERIOR DOOR
- DOOR OPERATOR
- EMBEDDED PHOTO



# Accessibility: Features and Barriers

## Using the Accessibility Drawings

### Introduction




---

The TDSB has produced drawings to show accessible features as well as barriers for each of its buildings. This information will be useful for students, staff, parents, and community members — some of whom have physical disabilities and need to know the features and barriers of our buildings.

The current Ontario Building Code (OBC) is generally used as the basis for the accessibility features included in the drawings. However, features that do not fully conform to current regulations are nevertheless identified. A legend noting features such as power-operated doors and elevators accompanies each set of drawings.

### Entrances

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Entrance numbers are provided on the drawings for reference and correspond to numbers posted inside and outside each public entrance. Entrance numbers have an associated icon:  (denoting a flush condition) or  (denoting a stepped condition). The approach to a flush entrance may be ramped, sloped, or flat, but has no appreciable height differential at the doorway. A stepped entrance is one with an appreciable step not compliant with OBC requirements for level access. Power-operated doors, if present, are identified with an  icon.

To ensure student safety and security, elementary school buildings have a locked door policy. Visitors are directed to enter through the building's main entrance door after contacting the main office using the intercom provided. Where applicable, the drawings will indicate a recommended path to the main entrance doors (i.e., an arrow pointing to the main door). A recommended path has **not** been shown **to** the main entrance where

- the main entrance is not level, **or**
- the path to the main entrance has a barrier.

If a level path exists between the parking lot and a nearby level entrance, the path to the parking lot from that doorway is indicated on the drawings regardless of whether there is a power-operated door present.

At secondary schools, intercoms are not present. Usually the doors closest to the parking lot or the main entrance doors are open during school operating hours. Recommended paths are shown to these doors if the path and doorway are level and there is a power-operated door present.





# Accessibility: Features and Barriers

## Using the Accessibility Drawings (cont'd)

### Interior Access

---


The 1st floor (at grade) of the school is assumed to be accessible, even if there is no recommended path to the building. Access to floors other than the 1st floor is indicated by an icon denoting an elevator  or ramp  if present. Stairway locations are highlighted on the drawings to indicate access to floor levels; this information is included for individuals who do not require the use of a mobility device.

The main office, community-use areas, and rotation-program areas are labelled on the floor plans for ease of navigation. Various instructional, administrative, and service rooms are also indicated.

Doors at corridors and stairwells are marked on the drawings. If a power-operated door is not present (icon is absent), the doors may present a barrier to some individuals. Power-operated door devices may be push-button, hold-open, or motion-detection types.

### Washrooms

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Washrooms that are moderately to highly accessible are recommended and identified by a  icon. The respective use for gender is also provided; male, female, or universal is denoted by a corresponding letter M, F or M/F.

### Fire Safety Planning

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Areas of Safe Refuge are locations where persons with disabilities begin their vertical-descent stage of evacuation upon fire alarm. These have been identified on the drawing where present. They are located at EXIT stairwell landings on floors other than those at grade level, where the stairwell doors latch. Information regarding the use of Areas of Safe Refuge is found within each site's Fire Safety Plan.





# Accessibility: Features and Barriers

## Accessibility Designations

The following definitions of accessibility at TDSB sites focus on mobility. Where accommodations exist for people with limited sight and/or hearing, or other types of disabilities, they will be described on each site's accessibility profile. Because each persons requirements are unique, the designation is to be used as a guide only.



### Accessible

A person who uses a mobility device can enter and move through the building to access all or most areas without assistance or with minimal assistance. To be deemed accessible,

- the building can be accessed by a barrier-free path,
- there is at least one level entry at a main entrance operated by a power-operated door,
- there is at least one barrier-free universal washroom on the main floor, and
- where the building has more than one level, there is an elevating device (such as a lift or passenger elevator), but access on all floors may be limited.



### Somewhat Accessible

Somewhat accessible is our designation for buildings that are not fully accessible, but they are also not completely inaccessible. They have some features that make them partially accessible.

In a somewhat accessible building, a person who uses a mobility device can enter and move through the main floor of the building with minimal assistance. Barrier-free access to other floors is not guaranteed. Generally speaking, to be deemed somewhat accessible,

- the building can be accessed by a barrier-free path and there is at least one level entry to the building, which may or may not have power-operated doors, and
- there is at least one washroom that is somewhat barrier free.



### Not Accessible

A person who uses a mobility device will either not be able to access the building or will require significant assistance. To be deemed not accessible,

- access to the building does not have a barrier-free path,
- there are no main entrances that are level, or

## **Appendix B: Accessible Schools**

**Accessible** means the building meets objective design parameters specific to the TDSB. A building meeting this level would allow independent access into and throughout the building and provide a barrier-free washroom.

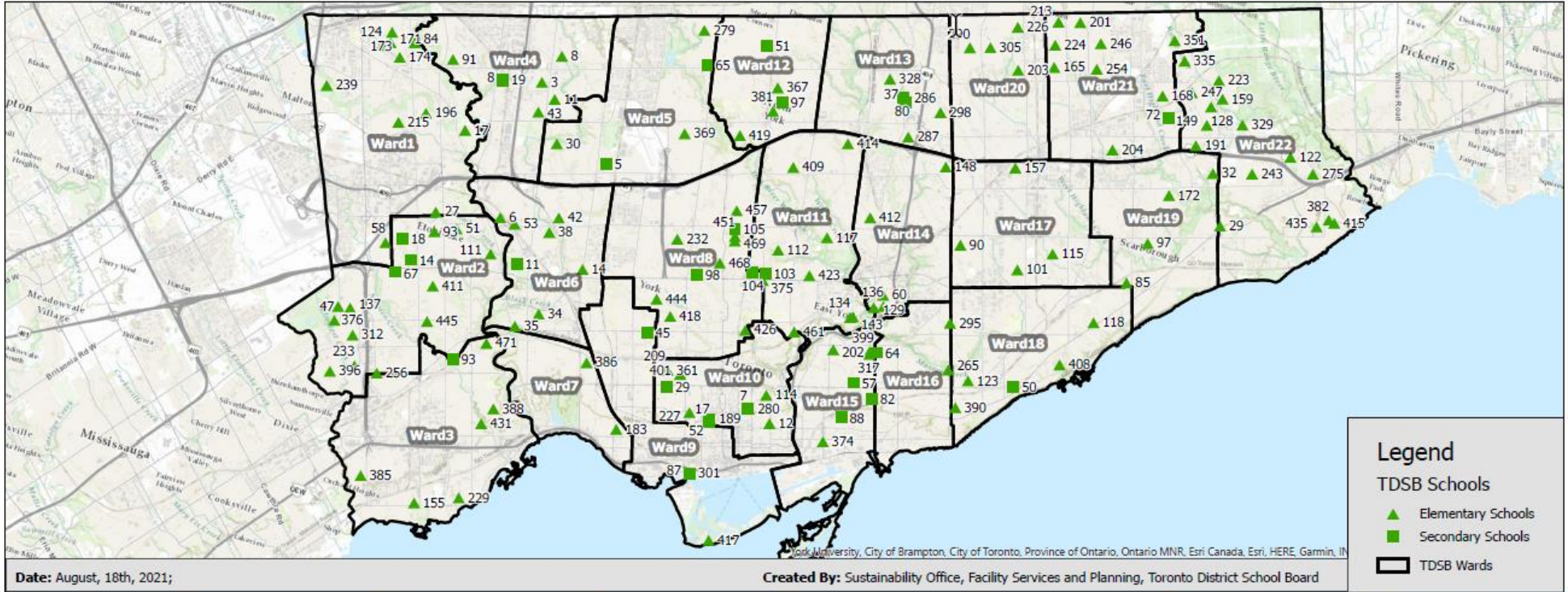
The 2014–15 on-site audit results identified the schools shown below as Accessible.

Please note that accessibility improvements have been made to some schools since they were audited but are not reflected in the categorization of schools.



Toronto District School Board

# Accessible Schools



LOI School Name	LOI School Name	LOI School Name	LOI School Name	LOI School Name	LOI School Name	LOI School Name	LOI School Name
3 Fingrov Public School	34 Rockcliffe Middle School	80 Georges Vanier Secondary School	115 Charles Gordon Senior Public School	172 Henry Hudson Senior Public School	223 Eatonville Junior School	328 Crestview Public School	409 Owen Public School
5 Downsview Secondary School	35 Lambton Park Community School	82 Monarch Park Collegiate Institute	117 Park Lane Public School	173 John D Parker Junior School	229 Humberwood Downs Jr Middle Academy	329 Alvin Curling Public School	411 St George's Junior School
6 H J Alexander Community School	37 North East Year Round Alternative Centre	84 North Kipling Junior Middle School	118 H A Halbert Junior Public School	174 Highfield Junior School	243 Morrish Public School	335 Thomas L Wells Public School	412 Norman Ingram Public School
7 Native Learning Centre	38 Brookhaven Public School	85 Scarborough Village Public School	122 Chief Dan George Public School	183 Perikide Junior and Senior Public School	246 Macdon Public School	351 Brookside Public School	414 Dulacoe Public School
8 Driftwood Public School	42 Amesbury Middle School	87 City School	123 Oakridge Junior Public School	189 Beverley School	247 Mary Shadd Public School	361 Hawthorne II Bilingual Alternative JS	415 William G Davis Junior Public School
8 Emery Erdvance Secondary	43 Stanley Public School	88 Riverdale Collegiate Institute	124 Claireville Junior School	191 Lucy Maud Montgomery Public School	254 Percy Williams Junior Public School	367 McKee Public School	417 Island Public/Natural Science School
11 York Humber High School	45 Oakwood Collegiate Institute	90 Wexford Public School	128 Alexander Stirling Public School	196 Rivercrest Junior School	256 Blooras Middle School	369 Dublin Heights Elementary and MS	418 Humewood Community School
11 Oakdale Park Middle School	47 Seneca School	91 Humber Summit Middle School	129 Valley Park Middle School	201 Banting and Best Public School	265 Crescent Town Elementary School	374 Morse Street Junior Public School	419 Cameron Public School
12 Lord Dufferin Jr and Sr PS	50 Birchmount Park Collegiate Institute	93 Westway Junior School	134 Fraser Mustard Early Learning Academy	202 William Burgess Elementary School	275 Rouge Valley Public School	375 Eglinton Junior Public School	423 Northlea Elementary and Middle School
14 Charles E Webster Public School	51 Valleyfield Junior School	93 Etobicoke Collegiate Institute	136 Gateway Public School	203 Silver Springs Public School	279 Rockford Public School	376 Holycrest Middle School	426 Deer Park Junior and Senior Public School
14 Central Etobicoke High School	51 Drewry Secondary School	97 Cornell Junior Public School	137 Wellesworth Junior School	204 Church Street Public School	280 Church Street Junior Public School	381 Claude Watson School for the Arts	431 Karen Vain School of the Arts
17 Heydon Park Secondary School	52 Subway Academy II	97 Earl Halp Secondary School	143 Thorncliffe Park Public School	209 Etaxw Junior and Senior Public School	286 Woodbine Middle School	382 Joseph Howe Senior Public School	435 Charlottetown Junior Public School
17 Brantburn Junior School	53 C R Marchant Middle School	98 Forest Hill Collegiate Institute	148 Rowwood Public School	213 Port Royal Public School	287 Forest Manor Public School	385 Sir Adam Beck Junior School	444 Spectrum Alternative Senior School
18 Kipling Collegiate Institute	57 Danforth Collegiate and Technical Institute	101 Sonview Public School	149 Emily Carr Public School	215 West Humber Junior Middle School	290 Sir Samuel B Steele Junior Public School	386 Indian Road Crescent Junior Public School	445 Rosebom Junior School
19 Emery Collegiate Institute	58 Parkfield Junior School	103 Northern Secondary School	155 Twentieth Street Junior School	223 Heritage Park Public School	295 Victoria Park Elementary School	388 Park Lawn Junior Middle School	451 Glenview Senior Public School
27 Kingsview Village Junior School	60 Grenoble Public School	104 North Toronto Collegiate Institute	157 Glamorgan Junior Public School	224 Milliken Public School	298 Brian Public School	390 Bantyre Public School	457 John Wanless Junior Public School
27 West End Alternative School	64 East York Collegiate Institute	105 Lawrence Park Collegiate Institute	159 Fleming Public School	226 Kennedy Public School	301 The Waterfront School	396 Milwood Junior School	461 Berrington Heights Elementary School
29 West Hill Public School	65 Northview Heights Secondary School	111 Westmount Junior School	165 Alexmuir Junior Public School	227 Kennington Community School	305 David Lewis Public School	399 Diefenbaker Elementary School	468 Alenby Junior Public School
30 Beverley Heights Middle School	67 Martingrove Collegiate Institute	112 Sunny View Jr and Sr PS	168 Tom Longboat Junior Public School	229 Second Street Junior Middle School	312 Broadacres Junior School	401 Peimerton Avenue Junior Public School	469 John Ross Robertson Junior Public School
32 Military Trail Public School	72 Lester B Pearson Collegiate Institute	114 Rose Avenue Junior Public School	171 Smithfield Middle School	232 Glen Park Public School	317 Cosburn Middle School	408 Chive Drive Public School	471 Lambton-Kingway Junior Middle School

## **Appendix C: Somewhat Accessible Schools**

A **Somewhat Accessible** building is one that doesn't meet the full criteria of Accessible but provides independent access into the building, a barrier-free washroom on the level of entry and no level disruptions to the entry level.

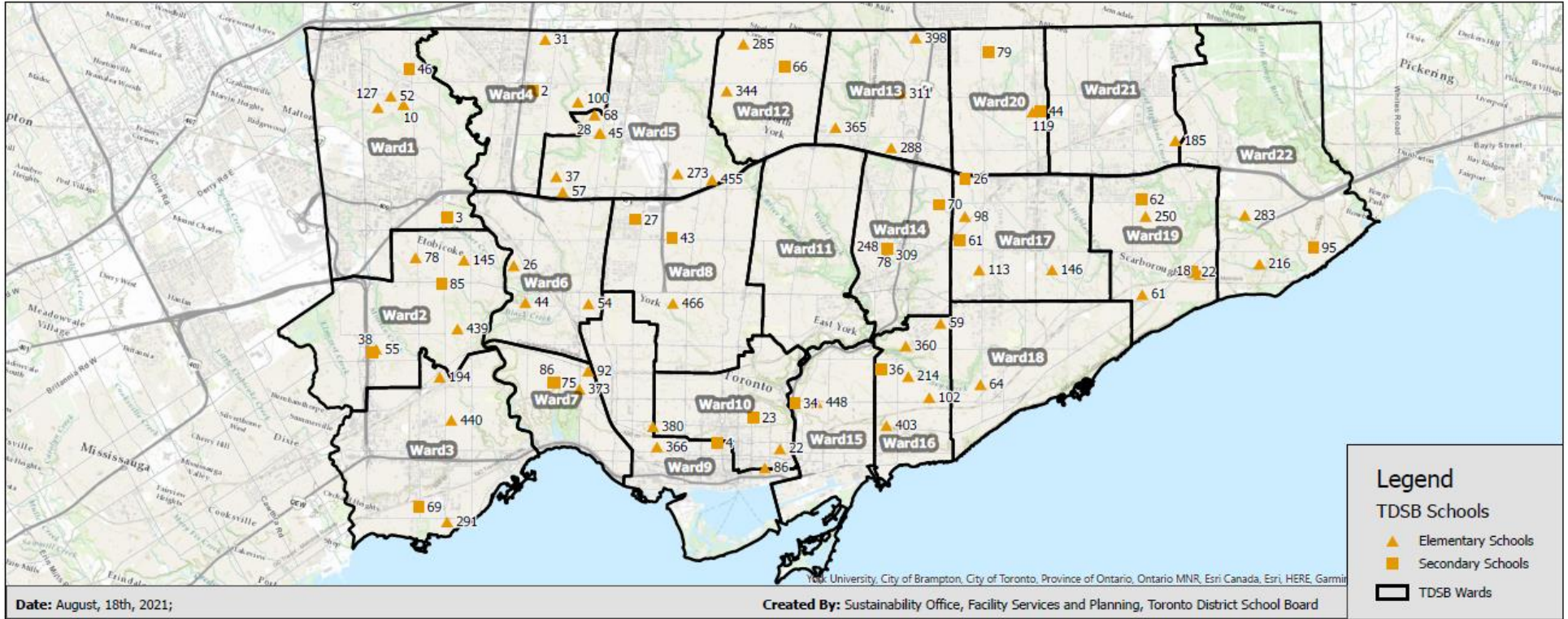
The 2014–15 on-site audit results identified the schools shown below as Somewhat Accessible.

Please note that accessibility improvements have been made to some schools since they were audited but are not reflected in the categorization of schools.





# Somewhat Accessible Schools



LOI	School Name	LOI	School Name	LOI	School Name	LOI	School Name	LOI	School Name	LOI	School Name
2	Westview Centennial Secondary School	34	CALC Secondary School	59	O'Connor Public School	85	Richview Collegiate Institute	185	Berner Trail Junior Public School	344	Yorkview Public School
3	School of Experiential Education	36	East York Alternative Secondary School	61	Wexford Collegiate School for the Arts	86	Market Lane Junior and Senior Public School	194	Islington Junior Middle School	360	Prestige Heights Elementary School
4	Contact Alternative School	37	Tumpane Public School	61	Cedar Drive Junior Public School	86	THESTUDENTSCHOOL	214	D A Morrison Middle School	365	Elkhorn Public School
10	Greenholme Junior Middle School	38	Burnhamthorpe Collegiate Institute	62	Woburn Collegiate Institute	92	Lucy McCormick Senior School	216	William G Miller Public School	366	Givins/Shaw Junior Public School
18	Eastview Public School	43	John Polanyi Collegiate Institute	64	Taylor Creek Public School	95	Sir Oliver Mowat Collegiate Institute	248	Don Mills Middle School	373	Keele Street Public School
22	Nelson Mandela Park Public School	44	Roselands Junior Public School	66	Avondale Secondary Alternative School	96	Maryvale Public School	250	Churchill Heights Public School	380	Ossington/Old Orchard Junior Public School
22	Maplewood High School	44	Sir William Osler High School	68	Stilecroft Public School	100	Lamberton Public School	273	Raywood Arts-Based Curriculum School	398	Arbor Glen Public School
23	Jarvis Collegiate Institute	45	Sheppard Public School	69	Lakeshore Collegiate Institute	102	William J McCordic School	283	Highland Creek Public School	403	Bowmore Road Junior and Senior Public School
26	Portage Trail Community School	46	North Albion Collegiate Institute	70	Victoria Park Collegiate Institute	113	George Peck Public School	285	Pleasant Public School	439	Humber Valley Village Junior Middle School
26	Parkview Alternative School	52	Elmbank Junior Middle Academy	75	Western Technical-Commercial School	119	Lynnwood Heights Junior Public School	288	Shaughnessy Public School	440	Norseman Junior Middle School
27	Yorkdale Secondary School	54	Silverthorn Community School	78	Don Mills Collegiate Institute	127	Albion Heights Junior Middle School	291	Seventh Street Junior School	448	Frankland Community School
28	Africentric Alternative School	55	West Glen Junior School	78	Dixon Grove Junior Middle School	145	Hilltop Middle School	309	Greenland Public School	455	Summit Heights Public School
31	Blacksmith Public School	57	Highview Public School	79	Dr Norman Bethune Collegiate Institute	146	Hunter's Glen Junior Public School	311	Don Valley Middle School	466	Cedarvale Community School

## **Appendix D: Not Accessible Schools**

Those buildings not meeting either Accessible or Somewhat Accessible defaulted to the **Not Accessible** category.

The 2014–15 on-site audit results identified the schools shown below as Not Accessible.

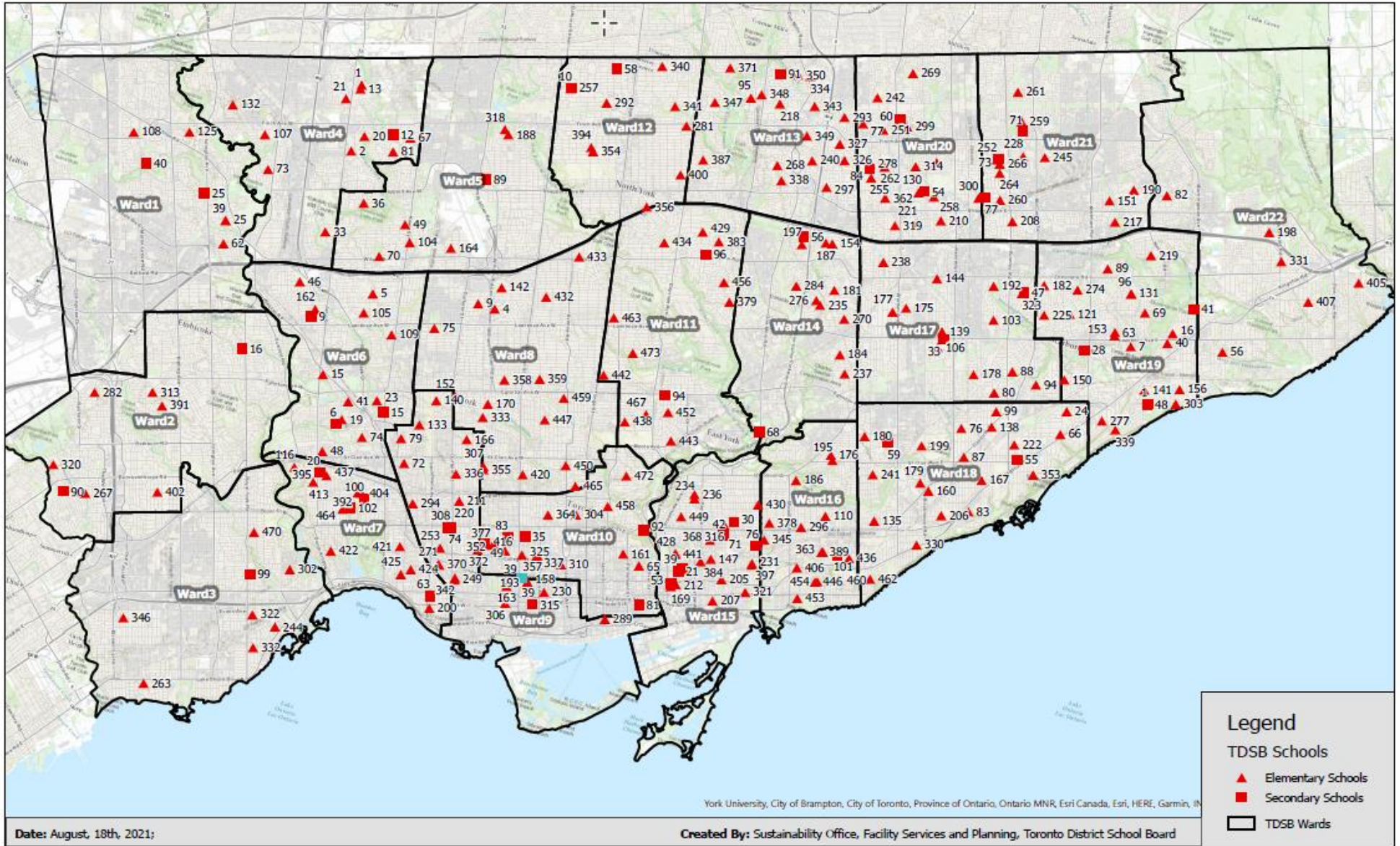
Please note that accessibility improvements have been made to some schools since they were audited but are not reflected in the categorization of schools.





Toronto District School Board

# Non-Accessible Schools







# Not Accessible Schools

LOI School Name	LOI School Name	LOI School Name	LOI School Name	LOI School Name	LOI School Name	LOI School Name
1 Native Learning Centre East	54 Stephen Leacock Collegiate Institute	99 Etobicoke School of the Arts	179 Danforth Gardens Public School	257 Fisherville Senior Public School	326 Pleasant View Middle School	400 Hollywood Public School
2 Shoreham Public Sports and Wellness Academy	55 R H King Academy	99 Walter Perry Junior Public School	180 Oaklea Public School	258 Tom O'Shanter Junior Public School	327 Ernest Public School	402 Wedgewood Junior School
2 Yorkwoods Public School	56 George S Henry Academy	100 Humberdale Collegiate Institute	181 Ranchdale Public School	259 Brimwood Boulevard Junior Public School	330 Birch Cliff Public School	404 Annette Street Junior and Senior PS
4 Flemington Public School	56 Joseph Brant Public School	101 Malvern Collegiate Institute	182 North Bendale Junior Public School	260 St Alexander Mackenzie Senior Public School	331 Meadowdale Public School	405 West Rouge Junior Public School
5 Maple Leaf Public School	58 Newtonbrook Secondary School	102 Ursula Franklin Academy	184 Victoria Village Public School	261 Agnes Marghall Public School	332 John English Junior Middle School	406 Norway Junior Public School
6 Frank Oke Secondary School	59 SATCC @ WIA Porter Collegiate Institute	103 Donwood Park Public School	186 Parkdale Elementary School	262 North Bridlewood Junior Public School	333 Davisville Junior Public School	407 Centennial Road Junior Public School
7 Willow Park Junior Public School	60 L'Amoreaux Collegiate Institute	104 Downsview Public School	187 Donview Middle Health and Wellness Academy	263 James S Bell Jr Middle Sports and Wellness Academy	334 Highland Middle School	413 Humbercrest Public School
9 Weston Collegiate Institute	62 Elmira Junior School	105 Gracefield Public School	188 Charles H Best Junior Middle School	264 North Agincourt Junior Public School	336 Regal Road Junior Public School	416 Horizon Alternative Senior School
9 Lawrence Heights Middle School	63 Parkdale Collegiate Institute	106 General Creer Public School	190 Dr Marion Hilliard Senior Public School	266 Henry Kelsey Senior PS	337 Lord Lansdowne Junior Public School	420 Hillcrest Community School
10 North West Year Round Alternative Centre	63 Tecumseh Senior Public School	107 Daystrom Public School	192 Edgewood Public School	267 Bloorville Middle School	338 Dellington Public School	421 Howard Junior Public School
12 C W Jefferys Collegiate Institute	65 Sprucecreek Public School	108 Melody Village Junior School	193 Downtown Vocal Music Academy of Toronto	268 Lescon Public School	339 Elizabeth Simcoe Junior Public School	422 Swinsea Junior and Senior Public School
13 Brookview Middle School	66 Bliss Carman Senior Public School	109 George Anderson PS	199 Gordon A Brown Middle School	269 Terry Fox Public School	340 Lilian Public School	424 Fern Avenue Junior and Senior PS
15 George Harvey CI	67 Derrydown Public School	110 Secord Elementary School	197 Rene Gordon Health and Wellness Academy	270 Broadlands Public School	341 Cummer Valley Middle School	425 Garden Avenue Junior PS
15 Bala Avenue Community School	68 Marc Garneau Collegiate Institute	116 Warren Park Junior Public School	198 John G Diefenbaker Public School	271 Shibley Street Junior Public School	342 The Grove Community School	428 Quest Alternative Senior School
16 York Memorial Collegiate Institute	69 George B Little Public School	121 Tredway Woodworth Public School	199 General Brock Public School	274 Bellmore Junior Public School	343 Hillmount Public School	429 Hillcrest Community School
16 St Margaret's Public School	70 Pierre Laporte Middle School	125 Beaumont Heights Junior Middle School	200 Queen Victoria Public School	276 Cassandra Public School	345 Earl Halg Public School	430 R H McGregor Elementary School
19 Cordelia Junior Public School	71 Albert Campbell Collegiate Institute	130 Pauline Johnson Junior Public School	205 Leslieville Junior Public School	277 George P Mackie Junior PS	346 Lanor Junior Middle School	432 Latbovy Park Elementary and Middle School
20 Runnymede Collegiate Institute	71 Kapapamahchikawew - Wandering Spirit School	131 Heather Heights Junior PS	206 Birch Cliff Heights Public School	278 J B Tyrrell Senior Public School	347 Lester B Pearson Elementary School	437 Arthur Heights Public School
20 Topkoff Public School	72 Carleton Village Jr and Sr Sports Wellness Academy	132 Gracevale Public School	207 Bruce Public School	281 Finch Public School	348 Zion Heights Middle School	434 St Andrew's Middle School
21 Gairford Public School	73 Delphi Secondary Alternative School	133 F H Miller Junior Public School	208 C D Parquharson Junior Public School	282 Briarcrest Junior School	349 Seneca Hill Public School	436 Adam Beck Junior Public School
21 Eastdale Collegiate Institute	73 Gullstream Public School	135 Samuel Hearn Middle School	210 Inglewood Heights Junior Public School	284 Three Valleys Public School	350 Cliffwood Public School	439 King George Junior Public School
23 Keeleisdale Junior Public School	74 Bloor Collegiate Institute	138 Robert Service Senior Public School	211 Doverscourt Public School	289 Downtown Alternative School	352 Montrose Junior Public School	438 Hodgson Middle School
24 Mason Road Junior Public School	74 Harwood Public School	139 Dorset Park Public School	212 Dundas Junior Public School	292 R J Lang Elementary and Middle School	353 Raimount Public School	441 Withrow Avenue Junior Public School
25 The Elms Junior Middle School	75 Joyce Public School	140 Fairbank Memorial Community School	217 Burrows Hall Junior Public School	293 Cherokee Public School	354 Willowdale Middle School	442 John Fisher Junior Public School
25 Thistledown Collegiate Institute	76 Conetta Junior Public School	141 Gullwood Junior Public School	218 Cresthaven Public School	294 Perth Avenue Junior Public School	355 Winona Drive Senior Public School	443 Rolph Road Elementary School
28 Cedarbrae Collegiate Institute	76 School of Life Experience	142 Baycrest Public School	219 Highcastle Public School	296 Gledhill Junior Public School	356 Avondale Public School	446 Glen Ames Senior Public School
30 Greenwood Secondary School	77 Agincourt Collegiate Institute	144 Ellesmere-Statton Public School	220 Pauline Junior Public School	297 Mulrhead Public School	357 da Vinci School	447 Forest Hill Junior and Senior PS
33 Winston Churchill Collegiate Institute	77 Chester Le Junior Public School	147 Blake Street Junior Public School	221 Lymngate Junior Public School	299 Brookmill Boulevard Junior Public School	358 West Preparatory Junior Public School	449 Jackson Avenue Junior Public School
33 Chalkfarm Public School	79 General Mercer Junior PS	150 Cedarbrook Public School	222 Anson Park Public School	300 Agincourt Junior Public School	359 North Preparatory Junior Public School	450 Brown Junior Public School
35 Central Technical School	80 Glen Ravine Junior Public School	151 Malvern Junior Public School	225 Bendale Junior Public School	302 Etienne Brule Junior School	362 Birklewood Junior Public School	452 Beesborough Drive Elementary and MS
36 Calico Public School	81 Inglewood Community School	152 Fairbank Public School	228 Iroquois Junior Public School	303 Jack Miner Senior Public School	363 Beaches Alternative Junior School	453 Kew Beach Junior Public School
39 Oase Alternative Secondary School	81 Ella Middle School	153 Golf Road Junior Public School	230 Ogden Junior Public School	304 Jesse Ketchum Junior and Senior Public School	364 Huron Street Junior Public School	454 Williamson Road Junior Public School
39 Oase Alternative SS (Skateboard Factory)	82 Grey Owl Junior Public School	154 Penske Public School	231 Roden Public School	306 Niagara Street Junior Public School	368 Earl Grey Senior Public School	456 Kenyon Public School
39 Boys Leadership Academy	83 Harbord Collegiate Institute	156 Poplar Road Junior Public School	234 Westwood Middle School	307 McMurrich Junior Public School	370 City View Alternative Senior School	458 Rosedale Junior Public School
39 Oase Triangle Program	83 Cliffside Public School	158 Ryerson Community School	235 Milne Valley Middle School	308 ALPHA II Alternative School	371 Stablesview Public School	459 Oriole Park Junior Public School
40 West Humber Collegiate Institute	84 Sir John A Macdonald Collegiate Institute	160 J G Workman Public School	236 Chester Elementary School	310 Orde Street Public School	372 Dawson Street Junior Public School	460 Balmly Beach Community School
40 Galloway Road Public School	87 Norman Cook Junior Public School	161 Winchester Junior and Senior Public School	237 Skane Public School	313 Princess Margaret Junior School	377 Delta Alternative Senior School	462 Courcolette Public School
41 Dennis Avenue Community School	88 Knob Hill Public School	162 Weston Memorial Junior Public School	238 Terraview-Willowfield Public School	314 Timberbank Junior Public School	378 Earl Beatty Junior and Senior Public School	463 Bedford Park Public School
41 West Hill Collegiate Institute	89 Woburn Junior Public School	163 Watson G Fraser Junior Public School	240 Kingsdale Public School	315 ALPHA Alternative Junior School	379 Rippletown Junior and Senior Public School	464 Nunya Junior and Senior Public School
42 Subway Academy I	89 William Lyon Mackenzie Collegiate Institute	164 Ancaster Public School	241 Regent Heights Public School	316 Wilkinson Junior Public School	383 Windfields Middle School	465 Cottingham Junior Public School
46 Pelmo Park Public School	90 Silverthorn Collegiate Institute	166 Rawlinson Community School	242 Sir Ernest MacMillan Senior Public School	318 Wilmington Elementary School	384 Pope Avenue Junior Public School	467 Maurice Cody Junior Public School
47 Alternative Scarborough Education I	91 A Y Jackson Secondary School	167 John A Leslie Junior School	244 David Horrell Junior School	319 Vadenburg Junior Public School	387 Bayview Middle School	470 Sunnyside Junior School
48 George Syme CS	92 Rosedale Heights School of the Arts	169 Queen Alexandra Middle School	245 Anson S Taylor Junior Public School	320 Hill Valley Junior School	389 Kimberley Junior Public School	472 Whitney Junior Public School
48 Sir Wilfrid Laurier Collegiate Institute	94 Leaside High School	170 J R Wilcox Community School	249 Alexander Muir/Gladstone Ave Jr and Sr PS	321 Duke of Connaught Junior and Senior PS	391 John G Althouse Middle School	473 Blythwood Junior Public School
49 Central Toronto Academy	94 John McCrae Public School	175 Manhattan Park Junior Public School	251 Beverly Glen Junior Public School	322 George R Gault Junior School	392 High Park Alternative School	
49 Blyden Public School	95 Pineway Public School	176 Selwyn Elementary School	252 Chartland Junior Public School	323 St Andrews Public School	394 Churchill Public School	
50 Highland Heights Junior PS	96 York Mills Collegiate Institute	177 Loranham Public School	253 Brock Public School	324 Clinton Street Junior Public School	395 Mountbview Alternative School	
50 SEED Alternative School	96 Ben Heppner Vocal Music Academy	178 Lord Roberts Junior Public School	255 Reglen Junior Public School	325 King Edward Junior and Senior Public School	397 Equinox Holistic Alternative School	

## **Appendix E: Case Studies**

### **Case Study #1 – Maplewood High School**

Maplewood HS is a specialized learning community that has historically offered a wide range of support programs for students with mild intellectual disabilities (MID) or developmental disabilities (DD). Prior to 2019, Maplewood HS was unable to provide a full range of programming for students with physical disabilities and MID/DD exceptionalities because it was not fully accessible. Given Maplewood's rich history of providing programming for MID/DD students, in 2011 the Board approved extensive building upgrades at the school to become a fully accessible site.

Maplewood HS is a two-story structure originally constructed in 1967 with a building area of approximately 11,000 square metres. At the time of construction there was no mandate in the Ontario Building Code to provide barrier-free accessibility for public buildings and the school was built without any considerations for persons requiring the use of mobility assistance devices such as wheelchairs. To make Maplewood fully accessible in compliance with section 3.8 of the Ontario Building Code, the following upgrades were made:

- New hydraulic passenger elevator to provide access to the second floor
- New ramp from street to main entrance with new accessible main entrance doors
- New universal washroom and staff room on second floor
- New interior doors complete with automatic door operators

To accommodate the elevator, a new building link was constructed on the second floor that connected two previously separate floor areas and provided barrier-free access to the entire second floor. The design for the elevator and associated barrier-free upgrades started in August 2016 with construction beginning the following summer. While barrier-free projects of this scale and cost are not commonly undertaken for existing facilities, the barriers to accessibility found at Maplewood are typical at most secondary and multi-story elementary schools where vertical circulation between floor levels (i.e., stairs) creates a barrier to accessibility.

### **Case Study #2 – The Elms Junior Middle School**

Many TDSB sites are not fully barrier-free but do provide a level of accessibility where persons requiring mobility assistance can access most of the school, including common areas such as the library, cafeteria, gym, and the main office. The Elms JMS is a two-story structure originally constructed in 1960 with five building additions added between 1965 and 1976. The total building area is approximately 10,200 square metres. At the time of construction, no considerations for barrier-free accessibility were included in the building design. Only six classrooms are located on the second floor but several elevation changes on the ground floor made the facility largely inaccessible. The school

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requested that the facility be approximately 80% accessible to accommodate students and staff members who required mobility assistance devices. The following upgrades at The Elms JMS were made to improve the barrier-free accessibility of the site:

- New interior ramp on the ground floor to provide access to all main floor areas and provide a more direct route to key support spaces including the gym, main office, cafeteria, library, and music classrooms
- New barrier-free entrance at Exit #7 complete with automatic door operators
- New universal washroom

The design for the new ramp and associated upgrades started in fall 2018 with construction beginning in spring 2019. Construction took about 1.5 years and the project cost approximately 1.3 million dollars. The cost and scope of The Elms JMS project is typical for barrier-free upgrades where the intention is to provide accessibility to most spaces, but where it is not feasible to make the facility completely barrier-free.

## Appendix F: Legislation and Regulations

Neither the Ontario Building Code (OBC) nor the Accessibility for Ontarians with Disabilities Act (AODA) requires the TDSB to retrofit existing buildings, but there are obligations when constructing new buildings and additions and when undertaking major interior and exterior renovations.

**Ontario Building Code:** Under the Ontario Building Code (OBC), accessibility standards apply to all *new and redeveloped buildings* open to the public, including schools. Examples of these features include ramps, lifts or elevators whenever there are changes in floor levels; automatic doors; width of door openings at entrances to buildings and common areas; accessible public washrooms; barrier-free paths of travel into and through buildings; visual and audible fire alarms; accessible seating in auditoriums; assistive listening systems in classrooms, meeting rooms, and auditoriums designed to hold at least seventy-five people.

**AODA:** In 2005, the provincial government passed the Accessibility for Ontarians with Disabilities Act (AODA) to make businesses and organizations more accessible. The AODA currently has five standards that organizations, including school boards, must follow to become accessible: information and communications, employment, transportation, design of public spaces, and customer service. The [AODA](#) does not yet have an education standard, but its [Design of Public Spaces Standard](#) has rules that apply to *major interior and exterior retrofits and building additions* in educational sites and buildings.

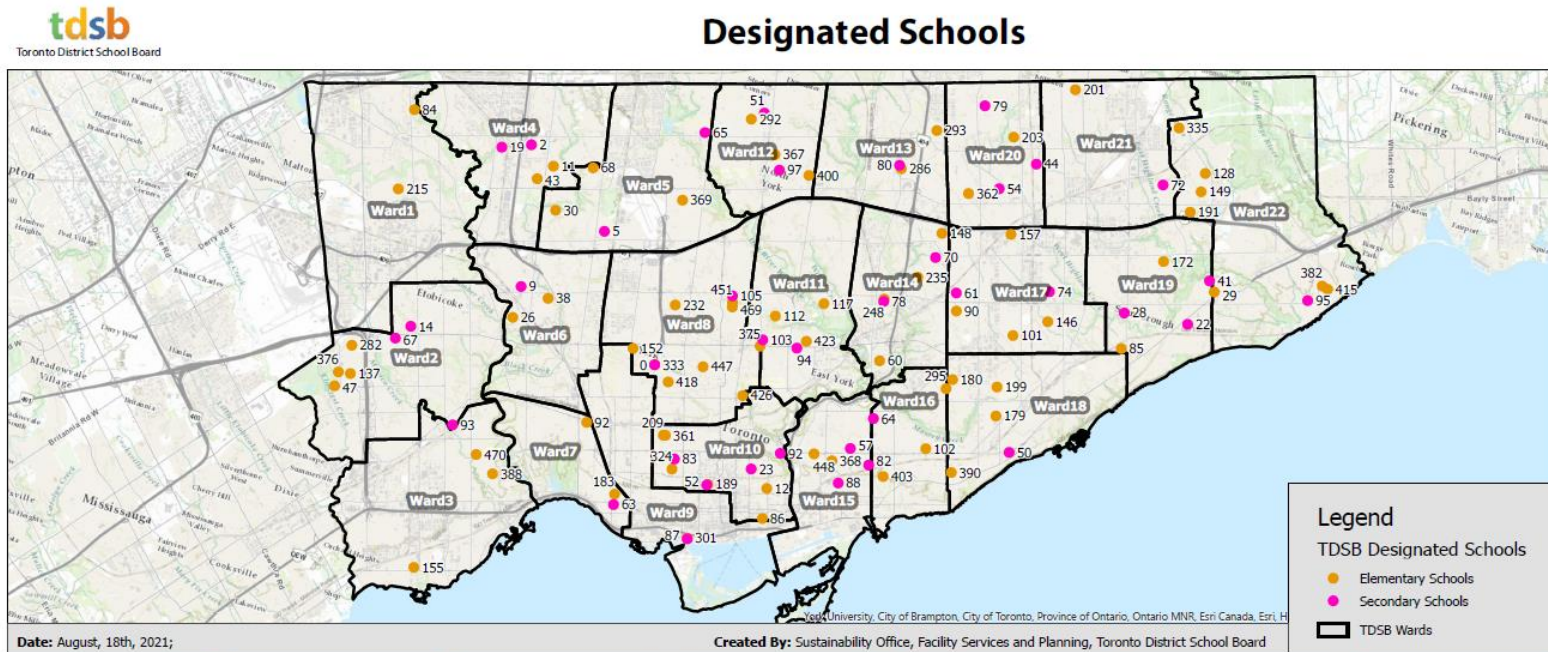
In 2017, the Ontario Minister Responsible for Accessibility established the Education Standards Development Committee to develop recommendations for a proposed accessibility standard to address barriers in publicly funded K-12 education. The committee's mandate is to address priority areas to determine the measures, policies, practices, and requirements to be implemented on or before January 1, 2025, and the timeframe for their implementation. The TDSB is awaiting further guidance from the Minister, including funding provisions.



## Appendix G: Designated Schools

The TDSB has had a network of designated schools for about twenty years. Designated schools is a term used to describe schools have been designated for students with accessibility needs.

In most cases, the school buildings are classified as Accessible, but because some areas do not have accessible facilities, some designated schools are not in fully accessible buildings.



LOI School Name	LOI School Name	LOI School Name	LOI School Name	LOI School Name	LOI School Name	LOI School Name
0 Vaughan Road Academy	43 Stanley Public School	72 Lester B Pearson Collegiate Institute	94 Lasside High School	157 Glamorgan Junior Public School	286 Woodbine Middle School	388 Park Lawn Junior Middle School
2 Westview Centennial Secondary School	44 Sir William Oaker High School	74 David and Mary Thomson Collegiate Institute	95 Sir Oliver Mowat Collegiate Institute	172 Henry Hudson Senior Public School	292 R.J Lang Elementary and Middle School	390 Blantyre Public School
5 Downsview Secondary School	47 Seneca School	78 Don Mills Collegiate Institute	97 Earl Haig Secondary School	179 Danforth Gardens Public School	293 Cherokee Public School	400 Hollywood Public School
9 Weston Collegiate Institute	50 Birchmount Park Collegiate Institute	79 Dr Norman Bethune Collegiate Institute	101 Sunnyside Public School	180 Clarke Public School	295 Victoria Park Elementary School	403 Bowerston Road Junior and Senior Public School
11 Gairdnie Park Middle School	51 Drewry Secondary School	80 Georges Vanier Secondary School	102 William J McCordic School	183 Parkdale Junior and Senior Public School	301 The Waterfront School	415 William G Davis Junior Public School
12 Lord Dufferin Jr and Sr PS	52 Subway Academy II	82 Monarch Park Collegiate Institute	103 Northern Secondary School	189 Beverley School	324 Clinton Street Junior Public School	418 Humewood Community School
14 Central Etobicoke High School	54 Stephen Leacock Collegiate Institute	83 Harbour Collegiate Institute	105 Lawrence Park Collegiate Institute	191 Lucy Maud Montgomery Public School	333 Davenville Junior Public School	423 Northlea Elementary and Middle School
19 Emery Collegiate Institute	57 Danforth Collegiate and Technical Institute	84 North Kipling Junior Middle School	112 Sunny View Jr and Sr PS	199 General Brock Public School	335 Thomas L Wells Public School	426 Deer Park Junior and Senior Public School
22 Maplewood High School	60 Grenville Public School	85 Scarborough Village Public School	117 Earl Haig Public School	201 Banting and Best Public School	361 Hawthorne II Bilingual Alternative JS	447 Forest Hill Junior and Senior PS
23 Jarvis Collegiate Institute	63 Westford Collegiate School for the Arts	86 Market Lane Junior and Senior Public School	128 Alexander Stringer Public School	203 Silver Springs Public School	362 Bridlewood Junior Public School	448 Frankland Community School
26 Parkdale Community School	62 Parkdale Collegiate Institute	87 City School	137 Wellesworth Junior School	209 Essex Junior and Senior Public School	367 McKee Public School	451 Glenview Senior Public School
28 Cedarbrae Collegiate Institute	64 East York Collegiate Institute	88 Rivendale Collegiate Institute	146 Hunter's Glen Junior Public School	215 West Humber Junior Middle School	368 Earl Grey Senior Public School	469 John Ross Robertson Junior Public School
29 West Hill Public School	65 Northview Heights Secondary School	90 Westford Public School	148 Roywood Public School	232 Glen Park Public School	369 Dublin Heights Elementary and MS	470 Sunnylea Junior School
30 Beverley Heights Middle School	67 Martingrove Collegiate Institute	92 Rosevale Heights School of the Arts	149 Emily Carr Public School	235 Mine Valley Middle School	375 Eglinton Junior Public School	
38 Brookhaven Public School	68 Siblecroft Public School	93 Lucy McCormick Senior School	152 Fairbank Public School	248 Don Mills Middle School	376 Hollycrest Middle School	
41 West Hill Collegiate Institute	70 Victoria Park Collegiate Institute	93 Etobicoke Collegiate Institute	155 Twelfth Street Junior School	282 Brantcrest Junior School	382 Joseph Howe Senior Public School	

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## **Annual Report 2021: Service Excellence**

**To:** Planning and Priorities Committee

**Date:** 3 November, 2021

**Report No.:** 11-21-4174

### **Strategic Directions**

- Allocate Human and Financial Resources Strategically to Support Student Needs
- Build Strong Relationships and Partnerships Within School Communities to Support Student Learning and Well-Being
- Create a Culture for Student and Staff Well-Being
- Provide Equity of Access to Learning Opportunities for All Students

### **Recommendation**

It is recommended that the Director establish the following achievement targets for all central business teams participating in the Service Excellence program:

- 2021-22 (cycle 4): Level 1
- 2022-23 (cycle 5): Level 2
- 2023-24 (cycle 6): Level 3

### **Context**

Between the 2018-19 and 2020-21 school years, sixty-seven central business teams participated in the TDSB's service excellence program. These teams represent fourteen departments, including Business Services, Employee Services, Facility Services and Planning, and Information Technology Services (see Appendix A for a complete list of 2020-21 teams by department).

During its May 2020 meeting, the Board of Trustees received the first annual TDSB Service Excellence report. That report highlighted the efforts of these central business teams in demonstrating the TDSB's [Vision for Service](#), including how teams are assessed and certified each year.

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Since the last report to Board, these central business teams have continued to conduct service improvements and adopt business best practices focused on delivering high-quality services to students, schools, staff, and communities. However, how teams have engaged in Service Excellence has significantly varied due to the impacts of COVID-19.

This report will share the 2020-21 Service Excellence results, an overview of the impact of COVID-19, including the need to reset the achievement targets, and how improvements are being made to the program to help strengthen the engagement of all central business teams.

### **2020-21 Service Excellence Results**

The original certification target for 2020-21 (cycle 3) was for all teams to achieve a minimum of level 2 (Implementer) certification. This certification target changed to "***all teams must complete the cycle***" to acknowledge the challenges that teams had continuing their engagement in the program during COVID-19. Teams had the choice of certifying or attending a check-in meeting. Certified teams provided evidence for review and achieved a certification level (see Appendix B for a description of certification levels). Check-in teams participated in a coaching meeting but did not receive a certification level.

The 2020-21 (cycle 3) certification highlights include:

- 31 teams achieving certification; and
- 34% of teams demonstrating best practices at level 3 (Specialist).

For a detailed list of 2020-21 (cycle 3) Certification Results by Department, see Appendix C.

Data collected during cycle three also gives meaningful insights on the impact of Service Excellence. Teams across central business departments have made progress in building a culture focused on meeting the needs of clients (e.g., students, schools, staff, and communities) and supporting staff. Strong practices demonstrated by the 31 certified teams include:

- 81% of teams implementing an improvement that increased the accessibility of their services or workplace
- 81% of teams using tools to track and analyze client needs
- 90% of teams seeking feedback on client satisfaction to improve services
- 87% of teams recognizing significant work milestones
- 61% of teams gathering staff feedback on team climate and staff well-being

See Appendix D for additional insights on the impacts of Service Excellence.



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For the twenty-three teams who achieved level 3 (Specialist), a common success factor was positive and inclusive leadership from management. These managers emphasize continuous recognition of individual and team efforts, foster shared leadership, and model service excellence practices. Three level 3 teams have shared their service excellence stories in Appendix E. These stories give concrete examples of how positive and inclusive managers work collaboratively with their teams to embed service excellence into the way they work.

Staff engagement has also been very positive in cycle 3, with 86% of all staff indicating they would recommend the Service Excellence program to other staff. See Appendix F for quotes from participating staff, highlighting what staff have found meaningful about the program.

### **COVID-19 Impact**

While the certification results for 2020-21 (cycle 3) highlight how teams are committed to continuous improvement and engagement in Service Excellence, COVID-19 has significantly impacted what engagement looks like. As a result of the pandemic, the cycle two target (2019-20) of all teams achieving level 1 (Explorer) and cycle three target (2020-21) of all teams achieving level 2 (Implementer) had to be modified. Instead of the original targets, teams could put their annual assessment and certification on hold by opting for a check-in. During both cycles, approximately 50% of teams opted for a check-in.

As staff adapt to services during COVID-19, it is essential to reset the achievement targets to re-engage all teams and establish consistent best practices across central business departments. To support teams in transitioning to deeper engagement, the following targets will be set:

- 2021-22 (cycle 4): All teams achieve level 1 (a reset to the original target before the pandemic)
- 2022-23 (cycle 5): All teams achieve level 2
- 2023-24 (cycle 6): All teams achieve level 3

Setting these targets will give teams a clear understanding of expectations and will support central business departments in deepening their demonstration of service excellence best practices.

### **Looking Ahead: Changes to Service Excellence Program**

To support teams in meeting these new targets and in response to team feedback over the past three years, the Service Excellence team is implementing several changes this cycle, including:

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- An online Service Improvement Planner tool that simplifies teams' improvement planning and deepens understanding of expectations and best practices;
- A real-time dashboard for each team that shows their service improvement activity and achievements in one place;
- On-demand online assessment of team service improvements;
- Streamlining and reduction of the evidence required to certify;
- Increased business coaching from the Service Excellence team to guide teams in adopting the changes;
- Increased strategic consulting to department leadership, projects, and committees to ensure the application of a service excellence lens to system-level initiatives.

### **Action Plan and Associated Timeline**

The new achievement targets will take effect upon approval of this report.

### **Resource Implications**

Program resources are managed in the current departmental budget.

### **Communications Considerations**

N/A

### **Board Policy and Procedure Reference(s)**

[TDSB Vision for Service](#)

### **Appendices**

- Appendix A: List of Teams Engaged in Service Excellence by Department
- Appendix B: Certification Levels Description
- Appendix C: 2021 (cycle 3) Certification Results by Department
- Appendix D: Service Excellence Impacts 2021 (cycle 3)
- Appendix E: Team Stories Highlighting Positive, Inclusive Leadership
- Appendix F: Staff Quotes on the Impact of Service Excellence

#### **From**

Maia Puccetti, Executive Officer, Facility Services at [Maia.Puccetti@tdsb.on.ca](mailto:Maia.Puccetti@tdsb.on.ca) or at 416-393-8780.

Richard Christie, Senior Manager, Sustainability at [Richard.Christie@tdsb.on.ca](mailto:Richard.Christie@tdsb.on.ca) or at 416-396-8554.

Arlene Winsborrow, Manager, Service Excellence at [Arlene.Winsborrow@tdsb.on.ca](mailto:Arlene.Winsborrow@tdsb.on.ca) or at 416-396-3445.

**Appendix A: List of Teams Engaged in Service Excellence by Department**

The following list represents the structure of the fourteen central business departments and sixty-seven teams engaged in Service Excellence during 2020-2021 (cycle 3).

**Departments with Multiple Teams**

**Department: Business Services**

**Teams:**

- |  |   |                               |
|--|---|-------------------------------|
| 1. Accounts Payable                      | 5. Compensation Services  | 9. Insurance & Risk           |
| 2. Budget, Revenue & Financial Reporting | 6. Distribution Centre & Printing, Mailroom, Courier, & Logistics | 10. Internal Audit Management |
| 3. Business Development                  | 7. Finance Support  | 11. Nutrition Services        |
| 4. Community Services                    | 8. General Accounting   | 12. Purchasing Services       |
|  |   | 13. Student Transportation    |

**Department: Employee Services**

**Teams:**

- |                               |  |   |
|-------------------------------|--|---|
| 1. Disability Case Management | 6. Police Record Check Office                | 10. Support Staff Recruitment   |
| 2. Elementary Teaching Office | 7. Secondary Teaching Office                 | 11. Support Staff Unit C Central/ Schedule II/ Administration/ Employee Relations |
| 3. Investigations             | 8. Staffing - Support Staff - Unit C Schools | 12. Units A, B & GI   |
| 4. Labour Relations           | 9. Staffing Information Systems              | 13. Units D & E   |

**Department: Facility Services and Planning**

**Teams:**

- |                               |                                   |                                |
|-------------------------------|-----------------------------------|--------------------------------|
| 1. Capital Project Management | 5. Design and Renewal             | 9. Permits                     |
| 2. Central Services           | 6. Facility Services Admin        | 10. Plant Operations           |
| 3. Construction - In House    | 7. Maintenance                    | 11. Security Operations Centre |
| 4. Construction Data Systems  | 8. Occupational Health and Safety | 12. Strategy and Planning      |
|                               |                                   | 13. Sustainability             |

**Department:** Government, Public and Community Relations

**Teams:**

1. Communications
2. Digital Communications and Marketing

**Department:** Information Technology Services

**Teams:**

1. App Admin Team
2. Business Analytics
3. Business Process
4. Central Transcript Office
5. Client Relations
6. Client Services Desk
7. Cyber Security and Risk Management
8. Field Services
9. IT Portfolio Management and Communications
10. ITS Enterprise Data
11. ITS Operations
12. Mobile and Web Development
13. Privacy Office
14. SAP Application Development
15. SAP A-Xcellence
16. SAP Basis and Security
17. School Information Systems

**Departments with a Single Team:**

1. Board Services
2. Continuing Education
3. Educational Partnerships
4. Executive Assistants
5. International Students and Admissions Office
6. Legal Services
7. Policy Services
8. Research and Development
9. Trustee Shared Services

Appendix B: Certification Levels Description

**Certification Level      What does this level look like?**

---



**Level 1 – Explorer**  
*25 to 49 points*

---

The team has begun to discuss Service Excellence in team meetings and is getting a Service Improvement Team (SIT) in place. In addition, there is basic documentation of a few business practices.



**Level 2 – Implementer**  
*50 to 74 points*

---

Practices and improvements are becoming established. The SIT is meeting regularly over the cycle and has committed to implementing one or two service improvements. Started basic planning practices and attention to improving in a few focus areas.



**Level 3 – Specialist**  
*75 to 88 points*

---

Practices and improvements are consistent and demonstrate complexity in how client services are assessed and delivered. The SIT and team are regularly collaborating on service improvements. Tools and templates are regularly utilized, and client and staff feedback is gathered and analyzed to improve continuously across multiple focus areas.



**Level 4 – Expert**  
*89 to 100 points*

---

Practices and improvements are advanced and demonstrate best practices sustained for at least two years (at level three) across all five focus areas. The SIT and team work collaboratively to plan and implement complex service improvements. Client and staff feedback indicate high levels of satisfaction, and insights are regularly captured and analyzed to drive improvements. The team has also learned and demonstrated coaching capabilities to strengthen other teams to deliver Service Excellence.

**Appendix C: 2020-21 (Cycle 3) Certification Results by Department**

Each department is listed in the following tables to outline certification score results, check-in status and teams who didn't participate in certification (did not complete cycle).

This appendix also provides a comparative look at team scores over the past three cycles. The change in scores between the current and previous cycles (if applicable) indicates team progress over time.

**Board Services**

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Board Services	61.46	Did not complete cycle	Did not complete cycle	N/A	N/A

**Business Services**

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Accounts Payable	48.13	Check-in	Check-in	N/A	N/A
Budget, Revenue & Financial Reporting	51.88	75.94	Check-in	N/A	N/A
Business Development	72.50	91.25	97.81 <sup>1</sup>	Level 3	6.56
Community Services	56.67	76.25	90.00 <sup>1</sup>	Level 3	13.75
Compensation Services	56.88	Check-in	71.56	Level 2	14.68
Distribution Centre & Printing, Mailroom, Courier, & Logistics	Did not complete cycle	Check-in	Check-in	N/A	N/A
Finance Support	50.83	60.94	81.25	Level 3	20.31
General Accounting	34.17	58.44	78.44	Level 3	20.00

<sup>1</sup> To achieve Expert level certification, teams need to meet additional requirements, including two years at level 3.



Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Insurance & Risk	N/A - New Team	Check-in	40.94	Level 1	N/A
Internal Audit Management	N/A - New Team	44.06	Check-in	N/A	N/A
Nutrition Services	Did not complete	42.50	58.75	Level 2	16.25
Purchasing Services	40.42	53.44	75.63	Level 3	22.19
Student Transportation	Did not complete	48.13	Check-in	N/A	N/A

**Continuing Education**

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Continuing Education	Did not complete	43.75	71.56	Level 2	27.81

**Educational Partnerships**

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Educational Partnerships	52.08	76.88	Did not complete cycle	N/A	N/A

**Employee Services**

<b>Unit Team Name</b>	<b>2018-2019 Score</b>	<b>2019-2020 Score</b>	<b>2020 - 2021 Score</b>	<b>2021 Level</b>	<b>Net Change [Since Previous Certification]</b>
Disability Case Management	51.67	63.75	70.31	Level 2	6.56
Elementary Teaching Office	29.38	52.50	85.94	Level 3	33.44
Investigations	33.54	Did not complete cycle	Did not complete cycle	N/A	N/A
Labour Relations	56.25	Check-in	85.31	Level 3	29.06
Organizational Management	70.63	Check-in	Check-in	N/A	N/A
Police Record Check Office	42.50	Did not complete cycle	Did not complete cycle	N/A	N/A
Secondary Teaching Office	51.04	Check-in	Check-in	N/A	N/A
Staffing - Support Staff - Unit C Schools	39.58	58.13	83.13	Level 3	25.00
Staffing Information Systems	15.21	Did not complete cycle	Did not complete cycle	N/A	N/A
Support Staff Recruitment	39.58	Check-in	Check-in	N/A	N/A
Support Staff Unit C Central/ Schedule II/ Administration/ Employee Relations	Did not complete	Check-in	63.13	Level 2	N/A
Units A, B & GI	28.13	Check-in	59.38	Level 2	31.25
Units D & E	77.29	Check-in	88.13 <sup>2</sup>	Level 3	10.84

<sup>2</sup> To achieve Expert level certification, teams need to meet additional requirements, including two years at level 3.

**Executive Assistants**

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Executive Assistants	N/A - New Team	Did not complete cycle	Did not complete cycle	N/A	N/A

**Facility Services and Planning**

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Capital Project Management	68.75	75.31	Check-in	N/A	N/A
Central Services	17.92	41.56	Check-in	N/A	N/A
Construction - In House	50.63	Check-in	Check-in	N/A	N/A
Construction Data Systems	59.38	Check-in	Check-in	N/A	N/A
Design and Renewal	34.38	Check-in	Check-in	N/A	N/A
Facility Services Admin	35.21	Check-in	Check-in	N/A	N/A
Maintenance	40.00	Check-in	Check-in	N/A	N/A
Occupational Health	37.92	Check-in	67.19	Level 2	29.27
Permits	54.38	Check-in	84.38	Level 3	30.00
Plant Operations	43.54	Check-in	Check-in	N/A	N/A
Security Operations Centre	26.67	Check-in	Did not complete cycle	N/A	N/A

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Strategy and Planning	64.93	81.04	93.75 <sup>3</sup>	Level 3	12.71
Sustainability	70.42	76.56	89.06 <sup>3</sup>	Level 3	12.50

**Government, Public and Community Relations**

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Communications	19.79	Check-in	Check-in	N/A	N/A
Digital Communications and Marketing	50.83	Check-in	Check-in	N/A	N/A

**Information Technology Services**

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
App Admin Team	55.00	75.00	95.31 <sup>3</sup>	Level 3	20.31
Business Analytics	62.71	Check-in	Did not complete cycle	N/A	N/A
Business Process	73.13	Check-in	Check-in	N/A	N/A
Central Transcript Office	58.54	70.00	89.69 <sup>3</sup>	Level 3	19.69
Client Relations	33.13	Check-in	Check-in	N/A	N/A

<sup>3</sup> To achieve Expert level certification, teams need to meet additional requirements, including two years at level 3.

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
Client Services Desk	82.71	Check-in	92.50 <sup>4</sup>	Level 3	9.79
Cyber Security and Risk Management	40.21	75.63	79.38	Level 3	3.75
Field Services	3.33	64.06	Check-in	N/A	N/A
IT Portfolio Management and Communications	62.08	81.25	95.31 <sup>4</sup>	Level 3	14.06
ITS Enterprise Data	47.50	76.25	100.00 <sup>4</sup>	Level 3	23.75
ITS Operations	39.38	55.00	Check-in	N/A	N/A
Mobile and Web Development	69.17	Check-in	95.00 <sup>4</sup>	Level 3	25.83
Privacy Office	0.00	Check-in	Did not complete cycle	N/A	N/A
SAP Application Development	36.04	80.00	95.31 <sup>4</sup>	Level 3	15.31
SAP A-Xcellence	54.38	70.94	89.69 <sup>4</sup>	Level 3	18.75
SAP Basis and Security	36.04	85.00	100.00 <sup>4</sup>	Level 3	15.00
School Information Systems	63.13	Check-in	Did not complete cycle	N/A	N/A

**International Students Admission Office**

Unit Team Name	2018-2019 Score	2019-2020 Score	2020 - 2021 Score	2021 Level	Net Change [Since Previous Certification]
International Students Admission Office	N/A - New Team	Check-in	Check-in	N/A	N/A

<sup>4</sup> To achieve Expert level certification, teams need to meet additional requirements, including two years at level 3.

**Legal Services**

<b>Unit Team Name</b>	<b>2018-2019 Score</b>	<b>2019-2020 Score</b>	<b>2020 - 2021 Score</b>	<b>2021 Level</b>	<b>Net Change [Since Previous Certification]</b>
Legal Services	58.54	Check-in	Check-in	N/A	N/A

**Policy Services**

<b>Unit Team Name</b>	<b>2018-2019 Score</b>	<b>2019-2020 Score</b>	<b>2020 - 2021 Score</b>	<b>2021 Level</b>	<b>Net Change [Since Previous Certification]</b>
Policy Services	61.25	Check-in	Check-in	N/A	N/A

**Research and Development**

<b>Unit Team Name</b>	<b>2018-2019 Score</b>	<b>2019-2020 Score</b>	<b>2020 - 2021 Score</b>	<b>2021 Level</b>	<b>Net Change [Since Previous Certification]</b>
Research and Development	29.17	77.19	Check-in	N/A	N/A

**Trustee Shared Services**

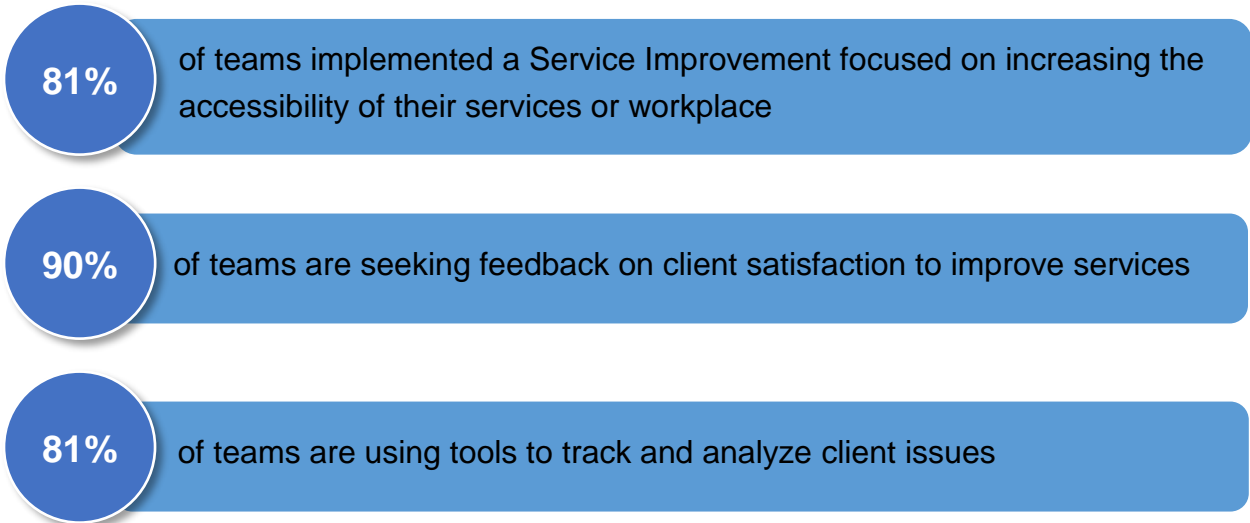
<b>Unit Team Name</b>	<b>2018-2019 Score</b>	<b>2019-2020 Score</b>	<b>2020 - 2021 Score</b>	<b>2021 Level</b>	<b>Net Change [Since Previous Certification]</b>
Trustee Shared Services	72.71	Check-in	81.25	Level 3	8.54



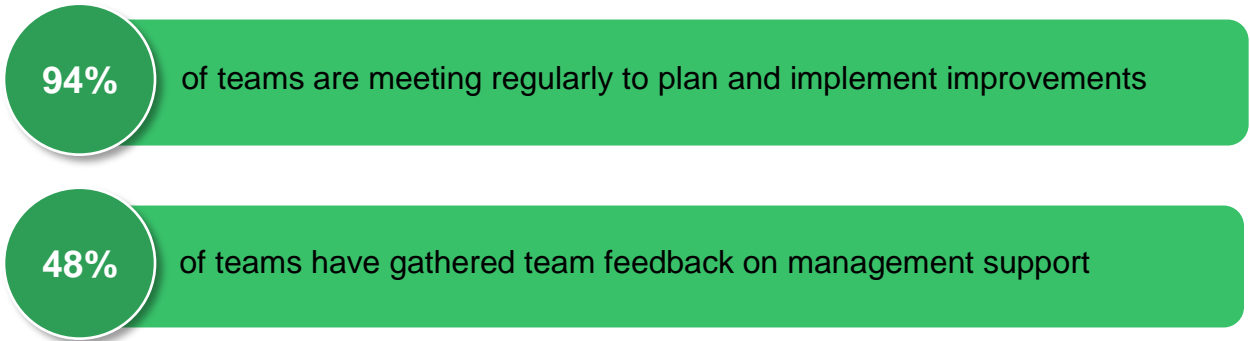
**Appendix D 2020-21 (Cycle 3) Service Excellence Impacts**

The following data reflects practices of the 31 certifying teams from cycle three.

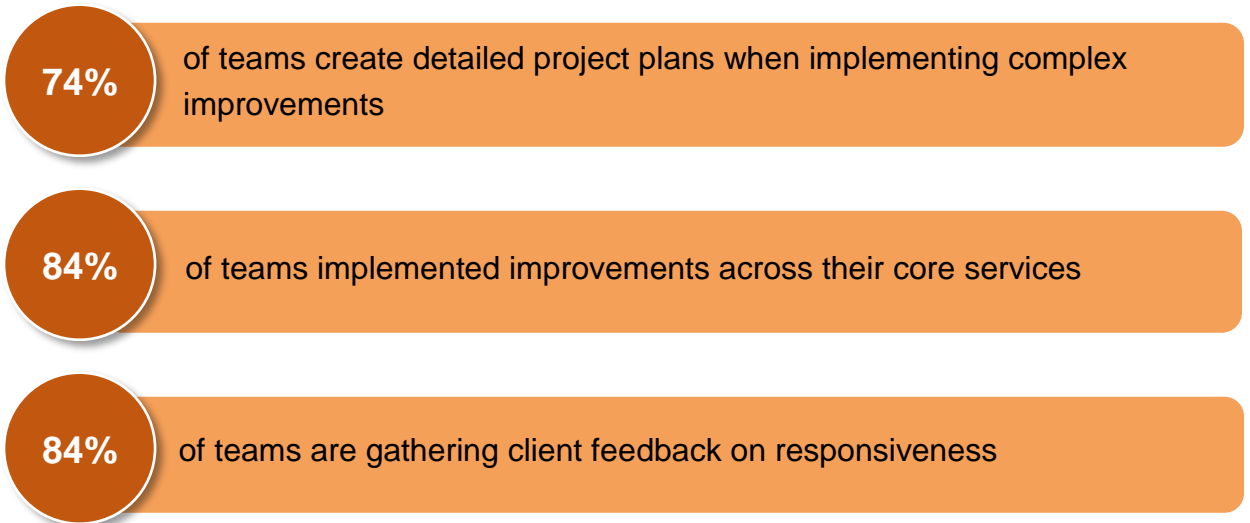
**Establishing Equity as the Foundation:**



**Fostering Leadership and Teamwork:**



**Strengthening Service Delivery:**



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**Celebrating Service Excellence:**

**220**

RASE submissions this year (503 RASE submissions to date)

**87%**

of teams are recognizing significant work milestones

**Developing Leadership Capacity:**

**61%**

of teams are gathering staff feedback on team climate

**32%**

of teams are gathering staff feedback on learning goals

**29%**

of teams have learning plans for each team member

**Appendix E: Team Stories Highlighting Positive Inclusive Leadership**

The following stories from level 3 teams highlight inclusive leadership's essential role in building a service excellence culture.

**Recognize Individual and Team Efforts: Business Development**



Business Development provides resources and advisory support to TDSB schools, staff and communities on donations, fundraising, and the distribution of materials. Actions management has taken to integrate recognition into the way they work include:

- Adding staff recognition as an item in weekly team meetings.
- Regularly sharing team successes with senior and executive management to profile the team's work.
- Submitting eight Random Acts of Service Excellence (RASE) nominations to recognize staff work in central departments.
- Creating opportunities for staff to see the direct impact of their work by giving staff time to participate in activities related to their team's work (e.g., vendor visits, school celebration events).

Focus on People Excellence: Client Service Desk



The Client Services Desk team, with 35 staff, provides IT call centre support to staff and students across the TDSB. Over the past four years, the management team has worked with their staff to create a positive work culture with engaged staff. Actions management has taken to prioritize people excellence include:

- Consistently collecting staff feedback and following up on it shows staff that their ideas are valued and their voice is essential.
- Emphasizing the importance of learning and collaboration with designated time during March Break and the Summer for strategic planning and professional development.
- Building fun into the work to relieve some of the stress of providing a front-line service - as seen in the picture above.



**Modeling Service Excellence: Strategy & Planning**

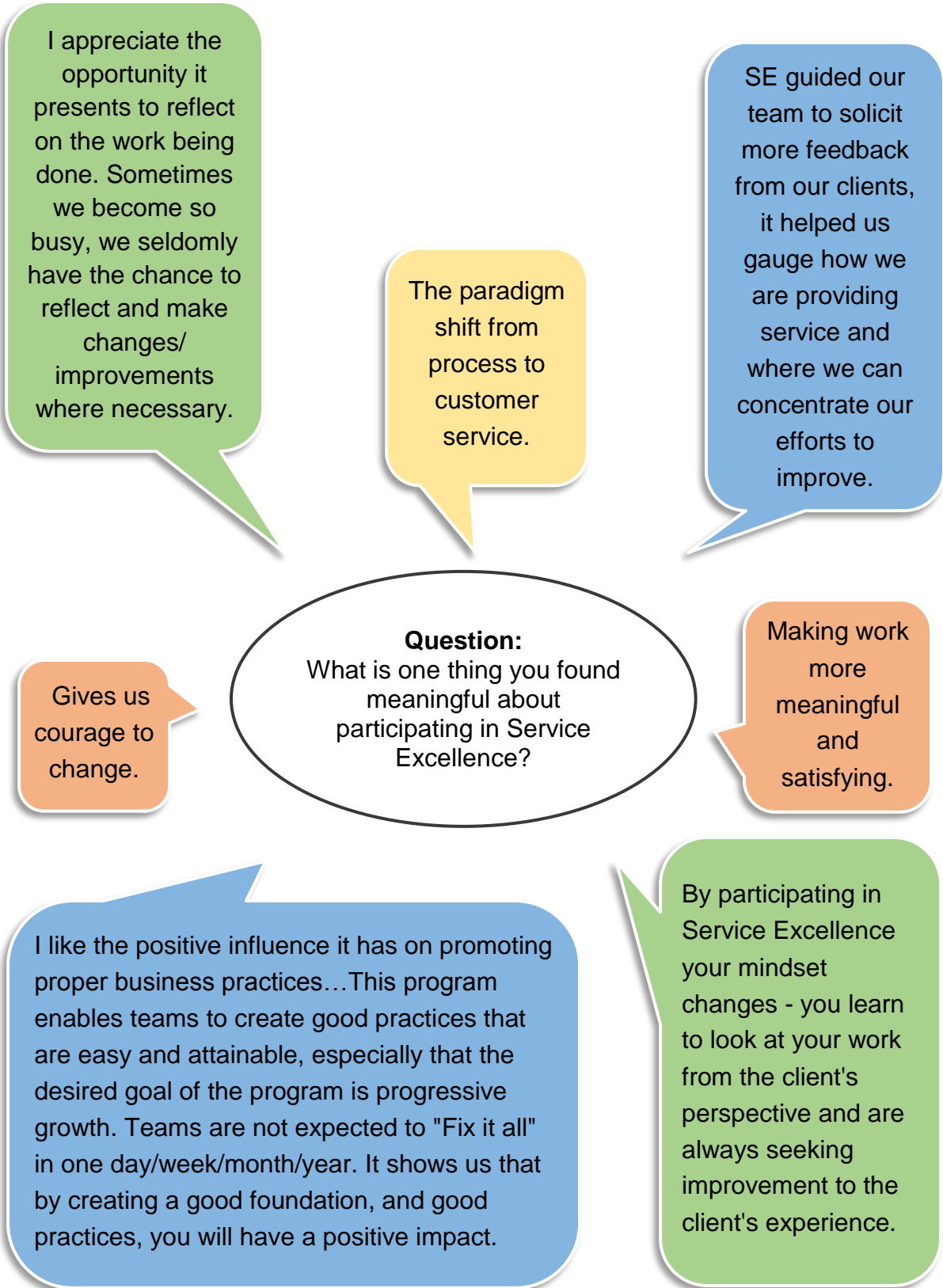


Strategy and Planning is a Facility Services and Planning team with 25 staff members who provide comprehensive planning data, analysis and plans to internal and external clients. Practices the management team have implemented to model Service Excellence with team members include:

- Conducting a Team Fitness Survey. Outcomes included a commitment to Actions and Ground Rules documents.
- Implementing a client feedback survey in the email signature of all staff members. Management regularly reviews the feedback and shares monthly updates with the broader team.
- Surveying staff across the unit to understand their professional development goals and how they could support these goals.

**Appendix F: Staff Quotes on the Impact of Service Excellence**

The following quotes come directly from central business staff through our 2021 (cycle 3) year-end survey.







## **Administrative Space Review: Revised Timelines**

**To:** Planning and Priorities Committee

**Date:** 3 November, 2021

**Report No.:** 11-21-4136R

### **Strategic Directions**

- Allocate Human and Financial Resources Strategically to Support Student Needs

### **Recommendation**

It is recommended that the revised timelines for the administrative space review be approved.

### **Context**

On February 3, 2021, the Board of Trustees received a report on the administrative space review and approved a timeline for accomplishing the review. The timeline identified four reports to go to the Board of Trustees in June 2021, December 2021, June 2022 and October 2022.

In the spring of 2021, due to the hiring of a new permanent Director of Education, the review was placed on hold until the new Director had an opportunity to provide input into the next steps of the review.

The purpose of this report is to provide a revised timeline for completing the review. The final report is still planned for October 2022. The timing of the intermediary reports has been adjusted.

### **Action Plan and Associated Timeline**

Below is a summary of the reports, their timing, and their proposed content. The reports will address the administration centres, maintenance centres, garages and warehouses.

January 2022 report:

- Summary of past reports on administrative space

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- Description of how funding for administrative sites works
- Review of literature to learn about what other organizations are doing with their sites and their space standards
- Guidelines for locations (e.g. geographic distribution, access to mass public transit, access to highways)

March 2022 report:

- Guidelines for space (e.g. sq ft per workstation, number of staff members per workstation, number of enclosed offices per unit or staff members, number of meeting rooms per unit/staff members, type of workstations, reception areas, public space, boardroom and committee rooms)
- Space needs for teams and staff members based on their specific functions

May 2022 report:

- Preliminary analysis of existing buildings and new opportunities
- Real estate analysis of sites
- Preliminary review of options – could involve existing buildings, new opportunities or a combination of the two

October 2022 report:

- Recommended option

### **Resource Implications**

Funding of options will be included in the analysis and reporting.

### **Communications Considerations**

Information will be shared on the TDSB public website.

### **Board Policy and Procedure Reference(s)**

Not applicable.

### **Appendices**

Not applicable.

**From**

Craig Snider, Interim Associate Director, Business Operations and Service Excellence at [craig.snider@tdsb.on.ca](mailto:craig.snider@tdsb.on.ca) or at 416-395-8469

Maia Puccetti, Executive Officer, Facilities and Planning at [maia.puccetti@tdsb.on.ca](mailto:maia.puccetti@tdsb.on.ca) or at 416-393-8780

Andrew Gowdy, System Planning Officer, Strategy and Planning at [andrew.gowdy@tdsb.on.ca](mailto:andrew.gowdy@tdsb.on.ca) or at 416-394-3917

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## Transportation Organizational Review

**To:** Planning and Priorities Committee

**Date:** 3 November, 2021

**Report No.:** 11-21-4198

### Strategic Directions

- Create a Culture for Student and Staff Well-Being
- Allocate Human and Financial Resources Strategically to Support Student Needs
- Build Strong Relationships and Partnerships Within School Communities to Support Student Learning and Well-Being

### Recommendation

It is recommended that:

a) the establishment of a separate legal entity framework for the purpose of managing student transportation services for the TCDSB and the TDSB be approved. This will replace the current transportation consortium structure.

b) a detailed implementation plan be presented to Trustees by the Spring of 2022 for consideration and final approval. The implementation plan will include, but not be limited to, the following elements:

- Articles of incorporation and Bylaws
- Governance structure and board membership external/internal (including voting structure)
- Staffing composition
- Operating budget development
- Implementation timelines

### Context

Since its inception, the governance structure of the transportation consortium between the TDSB and TCDSB has contributed to decision-making, staffing, operational and other challenges. Below is a timeline of events from 2006 to date:

School Year	Event	Description
2006-07	Ministry mandated consortia	Ministry memos 2006: SB13 and SB 26 (see Appendix A) outlined the mandate by the Ministry that coterminous boards work together in a consortium and provided financial incentives to act cooperatively, effectively and efficiently.
	Efficiency and Effectiveness (E&E) Review	In the subsequent E & E review, conducted by Deloitte, TDSB and TCDSB was able to secure some additional funding but scored low on the organizational structure (consortium) evaluation and as a result secured only 2/3 of the funding available. Please refer to Appendix C for this report.
2011-12	TSTG Membership Agreement Development	The Toronto student transportation group (TSTG) partnership agreement was developed. Please refer to Appendix D to review the agreement.
2014-15	Auditor General report	The Auditor General conducted an audit on student transportation in 2014-15. Majority of the recommendations were fully implemented. In 2020, the Auditor General provided a follow up report of the outstanding recommendations. .
2016-17	Ombudsman report	The Ontario Ombudsman’s office undertook a review of the transportation start-up and driver shortage issues in 2016-17. In addition to problems arising from the preceding year’s RFP process, the Ombudsman provided its findings regarding structural flaws and recommendations specifically related to the organization’s structure. Please refer to Appendix B for the findings and recommendations.
2019-20	Engagement of External Consultant	As a result of the challenges previously outlined, both boards agreed to explore their options by engaging Mr. Michel Paulin, external consultant, to review the structure, speak with engaged parties and to make recommendations. The pandemic has resulted in minor delays in finalizing the review. Please refer to Appendix E for his findings and recommendations.



2020-21	External Consultant Report Recommendations	The key findings and recommendations from the external consultant were released to TDSB and TCDSB and reviewed by senior management and the TSTG Governance Committee.
2021-22	Staff report to TDSB and TCDSB Boards regarding proposed changes to TSTG structure	Both TDSB and TCDSB to bring forward recommendations to their Boards to seek approval on establishing a separate legal entity for the management of student transportation services.

**Auditor General’s Report**

The Auditor General outlined the following key action items during the 2020 follow up review. The Transportation Consortia should:

1. Track and monitor utilization by using the most relevant and accurate information available in planning student transportation services, including actual ridership.
2. Evaluate the benefits of parents of students who are eligible to use school board provided transportation services being required to opt in or out of using transportation services.
3. Stagger school start and end times where possible to reduce the number of buses needed, by allowing them to be used on more than one run.
4. Reduce the need for transportation services by coordinating common days off.
5. Only contract for services that are required.

Action item #3 above has been completed, action items #1,2 and 5 are being implemented, and action item #4 has been implemented for the elementary panel but not the secondary panel. A follow-up review is in process for 2021.

**Ombudsman’s Report**

The Ombudsman’s office made the following three key recommendations around the TSTG organizational structure in their 2017 review (Appendix B):

1. The Toronto Student Transportation Group and the Toronto District School Board and Toronto Catholic District School Board should ensure that Transportation Group staff have access to the same resources and technology.

2. The Toronto Student Transportation Group should ensure that staff employment and reporting responsibilities are independent of the school board that administratively employs them.
3. The Toronto Student Transportation Group should modify its policies and procedures to reflect the revised organizational structure and staff employment responsibilities.

In addition to the challenges described above, the boards continue to have challenges with respect to decision-making from a governance perspective. Challenging issues have remained unaddressed due to the lack of a tie breaking option within meetings. As both boards receive two votes at governance committees, the possibility of a tie on a number of meaningful issues creates a logjam.

After the findings were reviewed by the TSTG Governance Committee, it was approved that an external consultant be engaged to conduct a detailed analysis of the TSTG Governance model and to recommend best practices.

Below are key findings from the external consultant. Please refer to Appendix E for the detailed report.

**External Consultant's Key Findings:**

1. TSTG's goal to reduce duplication and associated costs remains an unrealized goal. The duplication of work within the existing dual school board centric organizational structures makes it difficult to reallocate work. A copy of the current organizational structure is presented on page 18 of the External Consultant's report in Appendix E. The Auditor General and Ombudsman reports reinforce these points.
2. TSTG is missing on some if not all of the three success factors – structure, resources and tools. Most consortia have moved on and are more consolidated.
3. A lack of trust between the founding school boards is at the root of the current organizational design issues. It manifests itself in TSTG's divided organizational structure – setting the improper tone for the organization – and influencing staff behaviour.
4. TSTG governance structure is dysfunctional in dealing with dispute resolution.

**External Consultant's Recommendations:**

1. That TSTG be incorporated as a legal entity as an enabling means to become an employer.
2. That the TSTG is empowered to direct and control over the work environment for its staff, including establishing reporting structures, employment conditions, and HR policies independent of school boards.
3. That TSTG undertake an assessment of human resource skill sets, and position profiles required to match its current and future needs.

**Policies remain the purview of each respective board**

While the recommendations above point to the need for increased coordination and harmonization of operational processes and structures, it is important to note that the policies (distance, eligibility, programming, etc.) remain the purview of each board. Throughout the province there are many examples of boards working together under one incorporated entity while retaining their individual policies.

**Action Plan and Associated Timeline**

Throughout the course of developing an action plan, staff will work with legal counsel and other appropriate staff from each board to finalize the following processes for the development of the new legal entity:

- Articles of incorporation and Bylaws
- Governance structure and board membership external/internal (including voting structure)
- Staffing composition, including working with respective unions and human resources department to ensure all rights are respected and all collective agreement provisions followed
- Operating budget development

TCDSB will also be discussing these proposed changes with their board in the month of November so that both boards can align their work.

An update will be provided to the Planning & Priorities Committee in the Spring of 2022 and to seek approval on the establishment of the legal entity based on the work described above. A final implementation plan will be proposed at that time.

## **Resource Implications**

In order to develop the implementation plan, the work of external legal counsel and the consultant is estimated to be approximately \$50,000, to be shared between the two school boards. The resources needed to establish the formal legal entity will be presented as part of the report to the Planning & Priorities Committee in the Spring of 2022.

## **Communications Considerations**

Should the recommendations of this report be approved by both school boards, a communication will be provided to TSTG employees to inform them of this direction.

## **Board Policy and Procedure Reference(s)**

Policy P020 - Transportation of Students

Operational Procedure PR504 - Transportation of Students

## **Appendices**

- Appendix A: Ministry SB Memo 2006:26: Update on Student Transportation Reforms
- Appendix B: Ombudsman report: The Route of the Problem
- Appendix C: Efficiency and effectiveness review
- Appendix D: TSTG membership agreement between TDSB and TCDSB
- Appendix E: External consultant's report

## **From**

Craig Snider, Interim Associate Director, Business Operations & Service Excellence, at [Craig.Snider@tdsb.on.ca](mailto:Craig.Snider@tdsb.on.ca) or at 416-397-3188

Marisa Chiu, Interim Executive Officer of Finance, at [Marisa.Chiu@tdsb.on.ca](mailto:Marisa.Chiu@tdsb.on.ca) or at 416-395-3563

Garry Green, Senior Manager, Business Development, Community and Student Transportation Services at [garry.green@tdsb.on.ca](mailto:garry.green@tdsb.on.ca) or at 416-397-3883

**Ministry of Education**  
Business Services Branch  
21<sup>st</sup> Floor, Mowat Block  
900 Bay Street  
Toronto ON M7A 1L2

**Ministère de l'Éducation**  
Direction des services opérationnels  
21<sup>e</sup> étage, Édifice Mowat  
900, rue Bay  
Toronto ON M7A 1L2



**2006: SB26**

**MEMORANDUM TO:** Directors of Education

**FROM:** Nancy Whynot  
Director  
Business Services Branch

**DATE:** December 7, 2006

**SUBJECT:** Update on Student Transportation Reforms

---

Further to Memorandum 2006:SB13, dated July 11, 2006, I am writing to provide details on the student transportation reforms being implemented by the government, and more specifically, information about Phase One Effectiveness & Efficiency (E&E) Reviews on established consortia.

As indicated in the 2006-07 Grants for Student Needs announcement, the objectives of the reforms are to build capacity to deliver safe, effective and efficient student transportation services, achieve an equitable approach to funding and reduce the administrative burden of delivering transportation, thus allowing school boards to focus on student learning and achievement.

The reforms include a requirement for consortia, E&E reviews on established consortia, and a cost benchmark study for a 72 passenger school bus, incorporating standards for safe vehicles and trained drivers. This memo outlines the progress that has been made to date, and provides more information on each component of the reform process.

### **Working Groups**

In communications to the sector in July 2006, the Ministry indicated that it would be soliciting involvement from the sector to create working groups to assist in the implementation of the reform approach. Since then, the Ministry has formed two separate working groups, the Transportation Advisory Team (TAT) and the Consortia Plan Review Team (CPRT).

The Transportation Advisory Team, with representation from school boards and operators, has been formed to assist Ministry staff in preparing for the E&E reviews. Over the last three months the team developed a draft E&E Review Guide, which was shared with the sector on November 9, 2006. Members of the team also assisted

Ministry staff in reviewing the proposals that were received from consultants in response to a Request for Resources (RFR) and a Request for Proposals (RFP) issued by the Ministry. The successful consultants will work as an integral part of the team that will conduct E&E reviews on consortia.

A Consortia Plan Review Team has also been formed, with representatives from CODE, Mary Jean Gallagher, and COSBO, Isabel Grace. Jo-Anne Harrison, a respected and experienced transportation manager from the Sudbury Student Services Consortium is also a member of the review team. Since the group's first meeting in September they have worked with Ministry staff to develop the assessment templates that are being used to review consortia plans, as well as exemption requests from French-language boards. The team is also responsible for reviewing consortia plans using the assessment template, and making a decision on the acceptability of each plan. In all cases the decision of the team, and comments, will be forwarded to boards within a consortium.

### **Requirements for Consortia**

As outlined in Memorandum 2006:SB13, boards were required to submit consortia plans to the Ministry by November 17, 2006. At present, 23 site plans have been received, of which 18 have been reviewed and 10 have been approved. Further to this, 11 sites have requested an extension from the Ministry and have committed to submitting their plan by a specified date. Another meeting of the Consortia Plan Review Team will be scheduled to complete the review of remaining plans.

The Ministry will remain engaged with school boards over the next two years in order to monitor the progress of consortia development and to ensure that developing consortia are meeting the milestones outlined in their plans.

### **E&E Review Team**

As mentioned above, the Ministry has procured the services of two consultants to form the E&E review team that will undertake reviews of selected consortia. The management consultant that will head up the review team is Deloitte and Touche LLP. In addition, Management Partnership Services Inc. was the successful routing and technical consultant. The Ministry has also seconded Jo-Anne Harrison from the Sudbury Student Services Consortium to provide on-the-ground knowledge and expertise during the reviews.

### **E&E Reviews**

Once the Ministry is satisfied a site has achieved full consortia status, the consortium will be contacted to arrange an E&E review. The reviews will gather evidence to ensure that transportation is being administered, planned, and delivered effectively and efficiently. They will also facilitate an assessment of the transportation needs of each consortium based on consistent reference standards. Although subject to

refinements that will be made by the E&E review team prior to phase one, an E&E review guide was sent to all boards on November 9, 2006 in order to solicit feedback and provide an outline of the types of data that will be analyzed during the reviews. A final version of the E&E review guide will be shared with the sector once it has been refined by the E&E review team.

### **Phase One**

Four sites have been selected for Phase One reviews. The timeline for this phase of reviews will be from December 2006 to the end of February 2007. The four selected sites are:

- Student Transportation Services of Central Ontario – Kawartha Pine Ridge DSB, PVNC CDSB, CSD catholique Centre-Sud
- Transportation Consortium #12 – Peel DSB, Dufferin-Peel CDSB
- Rainy River Transportation Services – Rainy River DSB, Northwest CDSB
- Wellington-Dufferin Student Transportation Consortium – Upper Grand DSB, Wellington CDSB, Dufferin-Peel CDSB (in Dufferin County), CSD catholique Centre-Sud, CSD Centre-sud Ouest

In general, selection of sites for phase one E&E reviews was based on the following principles:

- Joint consortium plan was submitted to the Ministry on or before the November 17 deadline;
- Plan was approved by the CPRT at its meeting held on November 22, 2006 (i.e. the consortium has met all requirements for consortia outlined in Memorandum 2006:SB13);
- Ministry has confirmed that the consortium is technically ready for a review

In cases where consortia may have met these criteria but were not selected for a phase one review, Ministry staff will be in contact with the consortium to outline the tentative timeline for additional reviews, which will be conducted during 2007 and 2008.

### **Cost Study**

To ensure the delivery of safe, effective and efficient student transportation service, the government will engage a third party to conduct a cost benchmark study for school buses incorporating standards for safe vehicles and trained drivers. The findings of this study will complement the E&E reviews and provide additional information as the government considers adjustments to funding. Ministry staff are currently in the process of finalizing the terms of the review and will be releasing an RFR in the coming weeks. It is anticipated that the cost benchmark study will be completed by the end of March, 2007.

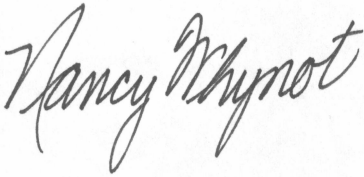


**Assistance**

Ministry staff are available to answer questions and provide support throughout the reporting process. Boards are encouraged to contact staff if they have questions or comments about any aspects of the transportation reform process.

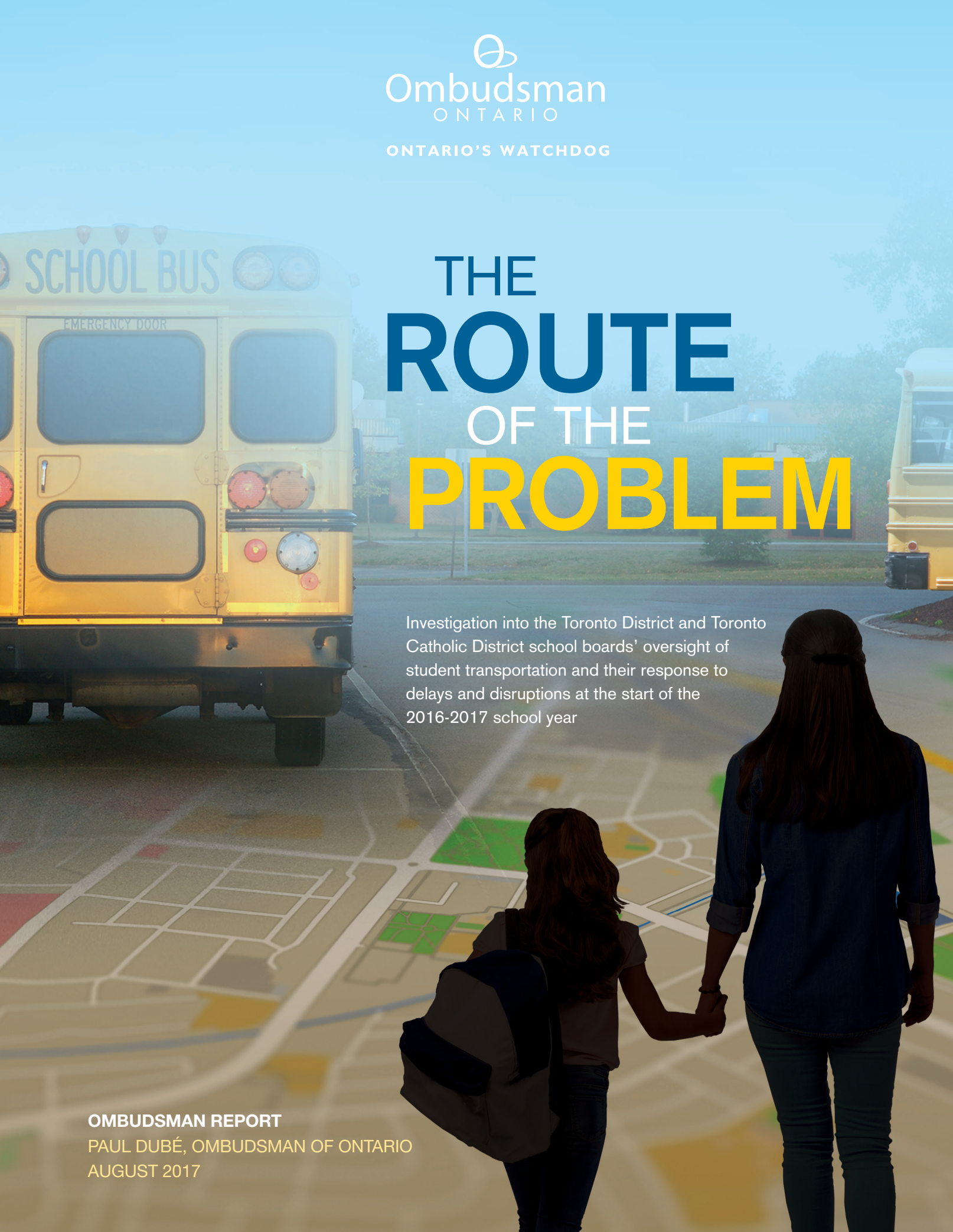
Please direct any questions to Sandy Chan at (416) 325-2464 ([sandy.chan@ontario.ca](mailto:sandy.chan@ontario.ca)).

We look forward to working with school boards and the student transportation sector throughout this project.

A handwritten signature in black ink that reads "Nancy Whynot". The signature is written in a cursive, flowing style.

Nancy Whynot  
Director  
Business Services Branch

cc. Superintendents of Business  
Transportation Managers



# THE ROUTE OF THE PROBLEM

Investigation into the Toronto District and Toronto Catholic District school boards' oversight of student transportation and their response to delays and disruptions at the start of the 2016-2017 school year

**OMBUDSMAN REPORT**

PAUL DUBÉ, OMBUDSMAN OF ONTARIO  
AUGUST 2017

Office of the  
Ombudsman  
of Ontario

**We are:**

An independent office of the Legislature that resolves and investigates public complaints about Ontario government organizations and municipalities, universities and school boards. The Ombudsman recommends solutions to individual and systemic administrative problems.

**Our Values:**

Fair treatment  
Accountable administration  
Independence, impartiality  
Results: Achieving real change

**Our Mission:**

We strive to be an agent of positive change by promoting fairness, accountability and transparency in the public sector.

**Our Vision:**

A public sector that serves citizens in a way that is fair, accountable and transparent.

# THE ROUTE OF THE PROBLEM



**DIRECTOR,  
SPECIAL OMBUDSMAN RESPONSE TEAM**

Gareth Jones

**LEAD INVESTIGATOR**

Domonie Pierre

**INVESTIGATORS**

Rosie Dear  
Grace Chau  
Elizabeth Weston  
May El Abdallah  
William Cutbush  
Ronan O'Leary

**GENERAL COUNSEL**

Laura Pettigrew

**COUNSEL**

Robin Bates



## **Ombudsman Report**

Investigation into the  
Toronto District and Toronto Catholic District  
school boards' oversight of student transportation  
and their response to delays and disruptions at the  
start of the 2016-2017 school year

### ***The Route of the Problem***

**Paul Dubé**  
**Ombudsman of Ontario**

**August 2017**



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## Executive Summary

- 1 The first day of school is often met with anticipation, expectation and a degree of trepidation by students and their families. Advance planning is key to getting students to school before that first morning bell. On Tuesday, September 6, 2016, six-year old Adam<sup>1</sup>, who lives with autism spectrum disorder, was one of about **49,000** Toronto students, **10,000** with special transportation needs, who waited anxiously for the iconic yellow school bus to arrive for the first day of school. However, the bus never came for Adam. Frustrated and desperate, his mother had to take him to school herself. In fact, for an entire week, Adam's mother had to stay home from work to ensure that he made it to school and back.
- 2 Adam and his family were not alone. In the first weeks of September 2016, about **2,687** Toronto students, more than **300** with special needs, were left stranded at bus stops or after school, waiting for buses that were hours late or never arrived because of a bus driver shortage. Many parents<sup>2</sup> scrambled to cope with this unexpected development, missing work and making urgent alternative arrangements to get their children to and from school. The mother of Beth, 6, lost her job after repeatedly showing up to work late because the bus was delayed or didn't arrive to pick up her daughter in the morning.
- 3 For some, the situation lasted a matter of days. For others it took weeks to stabilize. Thousands of students missed up to an hour of class each day in those crucial first days. The chaotic busing situation also compromised the safety of young and vulnerable students. At times, overwhelmed bus drivers, unfamiliar with routines, routes and security protocols, dropped students off alone, at wrong stops, or with strangers on the street. Special purple tags affixed to backpacks – signalling that children were to be left with a parent or other responsible person – were ignored. At least three junior kindergarten students sporting purple tags went missing for varying periods after being dropped off at the wrong stops. A Grade 3 newcomer with limited English and a purple tag was left alone on the sidewalk outside her apartment building. She was missing for four hours before she was found at the home of a neighbour. Students with special needs who were supposed to receive “door-to-door” transportation also went missing during the crisis. A 10-year-old non-verbal student living with autism spectrum disorder was found wandering in the yard of the wrong school, and a 15-

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<sup>1</sup> Names have been anonymized to protect confidentiality.

<sup>2</sup> The reference to parents in the context of this report includes guardians.

year-old student with physical and intellectual disabilities was dropped off at the back of her school without adult supervision.

- 4 Some students endured excruciatingly long bus rides because bus operators resorted to using one bus to cover multiple routes. For instance, we heard of a non-verbal child with autism spectrum disorder and epilepsy who spent two and a half hours on the bus one afternoon. Another student with Type 1 diabetes had a similar experience. Charlie, an 11-year-old boy who attends school at a children's treatment centre, spent almost four hours every day on the bus because of the driver shortage. Charlie's mother told us these long rides meant he arrived home each evening "starving, exhausted."
- 5 Bus delays and mix-ups during the disruption were particularly challenging for children with special needs. Danielle, a nine-year-old, non-verbal girl living with autism spectrum disorder, was picked up and dropped off at wildly inconsistent times for weeks. She was extremely distressed by the unpredictable changes in her routine. On the fourth day of school, she arrived home three hours late. Once, she was even driven to Markham despite the fact that she should have been dropped off in Scarborough. Apparently, each city has a street with the same name. Danielle wears a harness while riding the bus, and the stress and delay caused by the driver's mistake caused her to have a meltdown and soil herself.
- 6 My Office has had authority to investigate school board administration since September 2015. Since then, we have received more than **1,400** complaints about Ontario's school boards, including hundreds relating to busing. In September 2016, we received nearly **90** complaints from parents in Toronto concerning bus delays, cancellations, students dropped off at the wrong stops and the lack of response from school board officials. Given the volume and serious nature of these concerns, I initiated my first systemic investigation in the school board sector, focused on the Toronto District and Catholic District school boards' oversight of student transportation and their response to the busing crisis. I received a further **78** complaints after I launched my investigation.
- 7 School busing delays and mishaps occur each year. However, the scope of the problem in September 2016 was unprecedented. The Toronto District and Catholic District school boards, and the Toronto Student Transportation Group, which arranges busing for them, publicly blamed the disruption and delays on a severe and unanticipated bus driver shortage experienced by contracted bus operators. However, my investigation revealed that there were clear early warning signs evident months before the start of the 2016-2017 school year. Officials simply failed to adequately

monitor the developing situation, communicate effectively or plan for contingencies to minimize disruptions and delays.

- 8 Although driver scarcity is a perennial problem, the situation in September 2016 was compounded by the bifurcated nature of transportation planning and administration in Toronto. Staffing loyalty at the Toronto Student Transportation Group is divided, based on whether employees come from the Toronto District or Catholic District boards, resulting in operational silos and a culture of distrust. Each board separately administers its transportation policy, which can result in unexpected and adverse service impacts between the boards. Leading up to September 2016, the Toronto Catholic District board removed thousands of students from nearly finalized bus routes, only to re-add them after a public outcry. These route changes caused planning delays and confusion.
- 9 New busing contracts that came into effect in September 2016 also contributed to the busing crisis. As a result of the contracts, two new bus operators, unfamiliar with the Toronto landscape, were awarded hundreds of new bus routes, while familiar operators were shifted to different geographic areas. Some drivers dissatisfied with their new routes peremptorily quit or changed employers at the last minute. The route planning delays and changes resulting from the Catholic District board's decision also meant that the final routes were nothing like the mock routes operators had been given to prepare for the school year. The late route adjustments left operators struggling to find interested drivers only a few weeks before school began.
- 10 The Toronto Student Transportation Group was aware of the potential for significant service delivery issues in the weeks leading up to the first day of school. However, it failed to fully understand and adequately notify the boards about the gravity of the unfolding situation. Even once it told the boards about the impending serious service disruptions, the boards failed to warn parents and schools.
- 11 The boards and Transportation Group were unprepared when the crisis materialized. There was no communication strategy, so parents and school administrators were often left in the dark, uncertain when or if students would be picked up and dropped off each day. The Transportation Group, bus operators and school staff were quickly overwhelmed by a flood of inquiries and complaints. Telephones weren't answered and voicemail boxes quickly reached capacity. The boards also had no contingency plans in place to ensure student safety and supervision during the disruption. They were forced to strategize reactively in the midst of the ongoing crisis.

- 12 I have concluded based on the results of my investigation that the boards' oversight of student transportation and their response to delays and disruptions at the start of the 2016-2017 school year were unreasonable and wrong under the *Ombudsman Act*. This report makes 42 recommendations to improve the safety and reliability of the boards' student transportation. My Office received many complaints in fall 2016 relating to busing issues at school boards outside of Toronto. While they may not have experienced problems on the same scale as Toronto, I hope that these recommendations will also serve as a guide to other boards seeking to improve their transportation policies, procedures, and practices.
- 13 Ensuring the safe and timely transportation of children is a serious responsibility. Pre-planning, co-ordination and communication are essential to prevent and respond effectively to delays and disruptions. Children, parents and school administrators should not be left in the lurch when the wheels metaphorically fall off the bus.

## Investigative Process

- 14 My Office began receiving complaints about school bus issues in Toronto as soon as the 2016-2017 school year began on September 6, 2016. This wasn't surprising. Complaints are common during the first weeks of school, as various issues with bus routes arise and are resolved. However, the complaints we received in September 2016 were markedly different. We heard about lengthy bus delays and cancellations, vulnerable students being dropped off at the wrong stops, and an overwhelming lack of response from bus operators, the school boards and the Toronto Student Transportation Group, which arranges busing on their behalf. In addition, there were numerous media reports of delays, cancellations, and other disruptions. My staff closely monitored these serious issues and worked to find individual resolutions to the **88** complaints that we received during September 2016.
- 15 Given the number of complaints and the impact of the service disruptions, on September 26, 2016, I notified the Toronto District School Board, the Toronto Catholic District School Board, and the Toronto Student Transportation Group that I was launching a systemic investigation into whether the boards' oversight of student transportation and their response to delays and disruptions at the start of the 2016-2017 school year were adequate. I also informed the Ministry of Education, which funds student transportation in the province. After publicly announcing my investigation, we received an additional **78** complaints and submissions about the bus disruptions in Toronto.

- 16 Seven investigators, assisted by members of our Legal team, conducted **43** interviews with school board and Transportation Group staff, as well as staff from the Ministry of Education, school bus operators, industry stakeholders, unions representing school bus drivers, and representatives from other school boards and transportation groups. They also spoke to individuals who contacted our Office with complaints about the busing disruptions. Whistleblowers also came forward during the course of the investigation.
- 17 Investigators also reviewed more than 20 gigabytes of information provided at my request, including some 55,000 emails. As well, we looked at the structure, policies and procedures used by student transportation bodies throughout the province.
- 18 We received excellent co-operation from the school boards, the Transportation Group and other key stakeholders during the course of the investigation.

### Scope of investigation

- 19 My investigation focused on the Toronto District and Toronto Catholic District school boards, which experienced intense service disruptions on a significant scale in September 2016. However, our Office spoke with other school boards that were also affected by busing problems around the same time. Student Transportation of Peel Region told our investigators about significant service issues at the start of the September 2016 school year. They told us that, as of December 2016, **3,000** students were affected by these disruptions. We also heard about transportation disruptions in the Hamilton-Wentworth District and Hamilton-Wentworth Catholic District school boards, where staff told us approximately **1,500** students were affected. Although I did not expand my investigation to include these other boards, I am hopeful that this report and recommendations will help school boards throughout the province improve their oversight of student transportation and better respond to delays and disruptions.
- 20 During our investigation, we also heard from stakeholders who raised concerns about the procurement framework that governs busing contracts in the province, as well as issues with bus driver pay and working conditions. These matters were largely outside the scope of this investigation, which was limited to whether the Toronto boards' oversight

of student transportation and their response to delays and disruptions at the start of the 2016-2017 school year was adequate.<sup>3</sup>

## Student Transportation in Ontario

- 21 Before addressing Toronto's September 2016 busing crisis in detail, it is useful to consider the general context of school transportation in Ontario, where more than **800,000** students are bused to and from school each year.

### Legislative framework

- 22 Under the *Education Act*, school boards are self-governing bodies entitled to establish their own transportation eligibility criteria and policies.<sup>4</sup> There is no legislated requirement that boards provide busing for students. However, the Act excuses children from attending school if transportation is not provided by a board and there is no school within a prescribed distance from their residence.<sup>5</sup> In Ontario, most school boards arrange transportation for eligible students, usually by school bus.

### Ministry of Education

- 23 The Ministry of Education plays an important financial role in student transportation. It provides the bulk of operating funding to school boards, through the annual Grants for Student Needs program, also known as the "funding formula."<sup>6</sup> For the 2016-2017 school year, the total transportation grant amounted to \$896.6 million.

### School boards

- 24 School boards establish policies and eligibility criteria related to student transportation. To deliver these services efficiently, those in the same

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<sup>3</sup> Reference to Toronto boards in this report are to the Toronto District School Board and the Toronto Catholic District School Board. Two French-language boards – Conseil scolaire Viamonde and Conseil scolaire de district catholique Centre-Sud – also operate schools in Toronto. These boards were not included in our investigation.

<sup>4</sup> *Education Act*, RSO 1990, c E2, s 190.

<sup>5</sup> These distances are: 1.6 km for children under 7 years of age, 3.2 km for children aged 7-10, and 4.8 km for children over 10. *Education Act*, supra note 4 at s 21(2)(c).

<sup>6</sup> "Grants For Student Needs - Legislative Grants For The 2016-2017 School Board Fiscal Year", O Reg 215/16.



geographic area typically join together to establish a body to assist with arranging transportation, referred to as a consortium. They are represented on the boards that govern these consortia, and must provide them with information about their schools and students to assist in administering the transportation program.

- 25** School boards are not required by law to establish consortia, but since 2000, the Ministry of Education has provided financial incentives to those that chose to do so.
- 26** Since 2011, school boards have been required under the *Broader Public Sector Accountability Act, 2010* and its related directive to use competitive procurement for contracts greater than \$100,000.<sup>7</sup> Given their size, all student transportation contracts must be awarded using an open, fair, transparent and competitive procurement process. Procurements must be advertised through an electronic tendering system accessible to all Canadian suppliers, and suppliers must be given at least 15 days to respond.

### Transportation consortia

- 27** While some consortia are incorporated as legal entities separate from the boards that created them, many are not. Today, there are 33 transportation consortia in the province, and virtually all student transportation service is co-ordinated through them.
- 28** Typically, a consortium is responsible for:
- a) Administering the transportation policies of member school boards;
  - b) Planning transportation services for member school boards, including designing routes, identifying eligible students, determining student pickup and drop-off locations and times, and managing student information required by school bus operators;
  - c) Contracting with school bus operators to provide student transportation services and monitoring operators' service performance; and
  - d) Performing audits on school bus operators to ensure compliance with legislation, regulations, and contractual terms between the consortium and the operators.

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<sup>7</sup> *Broader Public Sector Accountability Act, 2010*, SO 2010 c 25.



## Bus operators

- 29** School bus operators are contracted by consortia and are responsible for providing transportation services that comply with legislative and regulatory requirements, as well as the contractual provisions between the operator and the consortium. There are more than 200 school bus operators in Ontario that provide publicly funded student transportation.

## Bus drivers

- 30** Most school bus drivers are employees of bus operators. For most students, parents, and school administrators, bus drivers are the face of student transportation.
- 31** The bus driver position is part-time, usually split-shift (i.e. they work in the morning and afternoon with a break in between), and low-paying, relative to other jobs that require a specialized driving license. It is also demanding work that can require supervising up to 70 children while safely navigating congested city streets. There is a chronic shortage of drivers and a high rate of attrition and turnover. One bus operator representative told us the company loses 15% of its drivers every year. We were told retention issues have worsened in recent years due to increased competition for drivers from other industry employers.
- 32** Typically, bus drivers are attached to specific routes, schools, or children, and will work for the operator that has the route they want. Bus operators told us that drivers often refuse to drive routes they do not like, insist on selecting their own routes, and quit if a route is changed too often or too significantly. Drivers may also commit to driving for multiple bus operators in the months preceding the start of school and then choose their preferred route and employer at the last moment. We heard of one case where a bus driver quit one operator to work for another – leaving the bus parked in a public place – without any notice to the original employer. We were also told drivers are not normally paid for the time it takes to get to and from where their buses are parked, and for that reason, they may refuse routes that are too far from their home. This was a significant factor in September 2016, when bus operators were given routes in parts of the city where they had not recruited drivers.

## Toronto's School Bus System

- 33 Transporting students in Toronto is a massive and challenging undertaking. There are some **49,000** children, **10,000** of whom have special transportation needs, who are bused accordance with policies established by the Toronto District and Toronto Catholic District school boards. The primary responsibility for arranging this transportation falls to the Toronto Student Transportation Group.

### Toronto Student Transportation Group

- 34 The Toronto Student Transportation Group is an unincorporated consortium that was created in September 2011 under agreement between the Toronto District School Board and the Toronto Catholic District School Board. The Transportation Group procures and manages transportation for the two boards. Its 2016-2017 budget was nearly \$100 million.

#### ***Organizational structure***

- 35 Day-to-day decision making at the Transportation Group is guided by an operations committee comprised of three members of its senior staff, as well as each board's senior business official responsible for transportation. The committee is responsible for:
- a) Making recommendations about the financial planning, annual budgeting and reporting;
  - b) Dealing with operator-related contract issues, including negotiations and dispute resolution;
  - c) Identifying and advising on policy and regulatory matters;
  - d) Dealing with transportation issues, such as parent requests for exceptions to the boards' transportation policies;
  - e) Communicating with provincial ministries regarding policy direction and regulations; and
  - f) Dealing with staffing and safety issues.
- 36 The Transportation Group is governed by a four-member committee that provides direction, oversight, and advice. Each board appoints a trustee and senior business official to sit on the governance committee. It is responsible for, among other things, reviewing and reporting to the boards on proposed policy changes, assessing policies and procedures, as well

as mediating and resolving issues brought forward by the operations committee.

### ***Transportation planning***

- 37** Each board has developed its own transportation policy, to which the Transportation Group's route planners must adhere. These policies establish eligibility requirements and place limits on the timing and length of bus rides.<sup>8</sup>
- 38** There are two types of bus routes in Toronto: Those serviced by traditional, large-capacity school buses ("big-bus" routes), and those serviced by smaller buses for students with special transportation needs. Planning for these routes is done separately, with big-bus route planning typically beginning in the spring so that a tentative schedule can be released before the school year ends in June.
- 39** The route planning process for students with special needs is more complicated. Every April, the Toronto Student Transportation Group contacts schools to determine how many existing students with special needs will require transportation for the next school year. The Transportation Group also receives transportation requests from each board for new students with special needs. Typically, routes for students with special needs are provided to bus operators in August.

### Toronto school bus operators

- 40** There are seven school bus operators that service about **1,750** routes in Toronto, covering more than 74,000 kilometres each day. Separate from these operators, the Toronto District board also maintains a fleet of 13 large school buses and a roster of full-time drivers to operate them. The Toronto Catholic District board does not have its own fleet.
- 41** The contracts entered into by the boards require that operators meet specified service standards including that they:

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<sup>8</sup> "Transportation of Students", Toronto District School Board (2005 October 27), online: <<http://www2.tdsb.on.ca/ppf/uploads/files/live/93/185.pdf>> and "Transportation Policy", Toronto Catholic District School Board (2015 November 19), online: <[https://www.tcdsb.org/Board/Policies/Documents/S.T.01\\_Transportation\\_Meta%20Policy%20Format.pdf](https://www.tcdsb.org/Board/Policies/Documents/S.T.01_Transportation_Meta%20Policy%20Format.pdf)>.

- Have a dedicated driver for each route and a sufficient number of spare drivers to cover for absent drivers. Operators must notify the boards when they have more routes than available drivers;
- Adhere to scheduled pick-up and delivery times unless “unusual circumstances” occur. If a bus will be delayed more than 15 minutes, the bus operator must directly notify parents of students with special needs. Operators must also notify schools and the consortium if students will arrive at school late;
- Ensure that students who participate in the “Purple Equals Parent” program (which uses purple tags on backpacks to identify children who must be met when dropped off) are not dropped off without a responsible individual present;
- Equip all buses with GPS tracking;
- Use a public notification system to provide parents with information about late buses in a variety of formats (e.g. email, text, phone call); and
- Maintain a sufficient number of phone lines and office staff to address inquiries from the public, schools, and families. One dedicated phone number must be provided to the Transportation Group for its sole use.

**42** Failure to meet these requirements entitles the boards to take remedial action, such as imposing financial penalties, assigning routes to another operator, and/or terminating the service contract. For instance, the contract provides that an operator can be penalized \$2,000 when a driver drops off a student unsupervised who has a purple tag displayed.

**43** To meet their obligation to report bus delays, operators use a special computer program that can be accessed by the Transportation Group and individual schools. Information about delays is also transmitted to a website – [www.torontoschoolbus.org](http://www.torontoschoolbus.org) – that can be accessed by parents, schools, and the general public.

## **Crisis, What Crisis?**

**44** As the first day of school for the 2016-2017 year approached, students, parents and school administrators in the two Toronto boards had no clue that a large-scale busing crisis was brewing. They reasonably assumed that the Toronto Student Transportation Group and senior board officials

had carefully planned and co-ordinated bus routes and schedules for the new school year. They were wrong.

### Harbinger of crisis

- 45** Six-year-old Adam lives with autism spectrum disorder. Transitions are particularly difficult for him. The first day of school, September 6, 2016, he waited anxiously for the school bus to arrive. As time passed without the familiar yellow bus coming into sight, his mother became increasingly concerned. She tried to contact the bus operator to find out what was going on, but couldn't get through. Finally, she was forced to stay home from work to take Adam to school and back. She continued to do so for an entire week. As would soon become apparent, Adam was not alone.
- 46** Similar scenarios were materializing throughout the city. In an email to the board, one Catholic District board principal said that on the first day:
- ...our last bus arrived at, yes really, 10:30 a.m. for an 8:30 a.m. school. A Grade 2 [student]...was left stranded at their bus stop for over two hours and [was] only picked up because another parent called me and advised me... His mother had left him there because she couldn't wait anymore because she had to get to work.
- 47** At the height of the service disruption, some **2,687** students were directly affected. About 2,400 of them were assigned to large-capacity buses; **300** were students with special transportation needs. The Transportation Group told us that at the worst point, 20 large-capacity and 27 special education routes did not have assigned drivers. However, the number of affected routes was much higher, since some drivers were servicing not only their routes, but portions of the driverless routes. Some students were affected for a few days, but others were subject to delays and disruptions for months.

### **Safety breaches**

- 48** The most disturbing aspect of the busing crisis was the lapse in safety protocols, which placed young and vulnerable students at risk. The Toronto Student Transportation Group has a program known as "Purple Equals Parent," to assist bus drivers in identifying students from junior kindergarten through Grade 3 who must be met when dropped off. A purple tag is affixed to the student's backpack, and drivers are responsible for checking for the purple tag. If a parent, older sibling or other responsible person is not at the stop, the driver is required to contact a

dispatcher and await instructions on how to proceed. Bus operators are responsible for training drivers on the program. During the crisis some bus drivers may have been unfamiliar with the routines, routes and security protocols or simply too overwhelmed to follow them. In the confusion and chaos, some students were dropped off at the wrong stops, sometimes several kilometres from their homes without supervision. At least one young student was handed over by a driver into the custody of a stranger walking along the street near the school.

- 49 Our Office heard of three separate cases where a driver dropped off a junior kindergarten student with a purple tag at the wrong stop. One four-year-old went missing on the first day of school when he got off at a wrong stop. Another's absence, after being delivered to the wrong location, went unnoticed for 20 minutes, until a passerby discovered the young boy wandering alone and brought him into a nearby school. Staff there called the boy's home school, just as it was preparing to call 911. Another junior kindergarten student with a purple tag was dropped off three stops early with no one to meet him. All the children were eventually reunited with their families, but given their ages, clearly the safety breaches were significant.
- 50 We also learned of other vulnerable students placed at risk during the busing crisis. For instance, a Grade 3 newcomer student with limited English and a purple tag was left alone on the sidewalk outside her apartment building around 3:30 p.m. Her parents eventually contacted the school and police after their daughter didn't arrive home as expected. At 7:40 p.m. – four hours after the student had been dropped off – she was found with an unfamiliar neighbour who had discovered her alone on the street. In another case, a 10-year-old nonverbal student with autism spectrum disorder was found wandering in the yard of the wrong school. This was in contravention of the transportation policy for students with special needs, which specifies that they receive door-to-door transportation to ensure safety and supervision.

***Missed classes, long rides and difficult adjustments***

- 51 Many students lost out on significant learning time as a result of the busing situation in the critical first days and weeks of school. Two parents, one of a kindergartner with a developmental disability, told us that their children missed up to an hour of instruction per day for over a month. A public school principal raised a similar issue, noting that the impact on student learning was “becoming more significant with each passing day.”
- 52 Others told us that their children had very long bus rides because drivers made extra stops to help service driverless routes. Toronto Student



Transportation Group staff told us some students didn't get home until 6 p.m., even though their school was dismissed at 3:15 p.m. We heard of a non-verbal child with autism spectrum disorder and epilepsy who spent two and a half hours on the bus in the afternoon. Another student with Type 1 diabetes had a similarly long bus ride. Charlie, an 11-year-old who attends school at a children's treatment centre, spent nearly four hours on the bus every day for months.

- 53** More generally, parents complained that the delays and makeshift transportation plans made it difficult for students – especially those with special needs – to adjust to a new school year. A Catholic District principal expressed these concerns in an email to the board, noting:

Parents, teachers, support staff and administrators are very dependent on the transportation for our students with special needs, as we wish them to arrive to school safe, on time and ready to learn. Due to multiple transportation no-shows, our students with special needs have experienced high anxiety and a sense that they are not important...Parents, teachers, support staff and administrators are worried about the message being sent out to our students. It is clearly being said that they are not important and don't matter.

- 54** The mother of Danielle – a nine-year-old, non-verbal girl living with autism spectrum disorder – told us about her busing struggles at the start of the year. On the first day of school, Danielle was picked up 20 minutes early and dropped off over an hour later. On the third day of school, the bus driver mistakenly drove Danielle to Markham after school, even though she should have been dropped off in Scarborough, apparently because the street had the same name as one in Markham. The stress and delay caused by the driver's mistake caused her to soil herself. On the fourth day of school, Danielle arrived home three hours late. These severe busing issues would be upsetting for any nine-year-old, but they were especially challenging for Danielle, who struggled to understand the delay and becomes severely stressed and anxious when her routine is changed. Danielle's mother complained about these incidents but never received an adequate explanation.
- 55** Several parents told us they were forced to risk their employment by skipping work or repeatedly showing up late. The mother of six-year-old Beth told us the bus was late or a no-show so often that she lost her job, because getting her daughter to school made her late for work too many times.



## First day of school: “Tomorrow will be better”

- 56** While students and their families grappled with their personal transportation nightmares on the first day of school, the Transportation Group and the two Toronto school boards remained relatively oblivious to the situation.
- 57** When buses began picking up students on September 6, 2016, the Toronto Student Transportation Group and the Toronto boards initially thought things were going as well as could be expected for the first day. They knew of some transportation disruptions in the morning and afternoon, but they attributed this to new drivers, teachers, students and parents getting accustomed to their routes. After the morning buses completed their routes, the Transportation Group’s Operations Manager emailed the Toronto District board that the first morning was “not smooth, but no first day is smooth.” In an update to both boards around 12:30 p.m., the Operations Manager assured them that “tomorrow will be better” because drivers would have experience with the routes and operators would improve in covering vacant routes and providing notification about any residual service issues.
- 58** In reality, thousands of parents and children were spending hours waiting for buses that were late or never showed up and some young and vulnerable students were being let off at the incorrect bus stops without adult supervision. Parents were receiving little or no information about bus delays or cancellations and struggled to contact bus operators whose lines were constantly busy.
- 59** Some parents began sharing their frustration on Twitter. Many parents tweeted about buses that were over an hour late, while others complained that buses didn’t arrive at all. Some examples of their comments:

@tdsb Day 1 school bus was 90 minutes late! Can this be more ridiculous?!

#TDSBfirstday @tdsb who organizes the buses for TDSB? 1 hr after school let out and my daughter who is in SK and 20 others still no bus

The afternoon bus didn’t come either. How can we find out if there’ll be a bus tomorrow morning?

@TCDSB first day JK! Yeah! Why was our afternoon bus 1hr late?? Kids were home @ 5pm!! I hope tm is better day! Bus didn't show this morn

@TCDSB Your services with the school buses are sickening. My 3 kids and I have been waiting over an HOUR for pickup. STILL NO BUS!!!

- 60 By the end of the day, the Transportation Group had also received reports of several delays and buses that never appeared. For instance, it reached out to a bus operator at 5 p.m. because several schools with 3 p.m. dismissal bells had called to say that students still had not been picked up. The Toronto District board's communication officer even received a media inquiry about delay at one school.

## Second day: Wednesday, September 7

- 61 By the second day of school, the Transportation Group, bus operators, the two boards and individual schools were overwhelmed with inquiries and complaints about busing. A member of the Toronto District board's communications department who had been monitoring social media emailed colleagues to say that the volume of complaints seemed "**really off the charts**" compared to previous years. Parents were frustrated and angry that they had received no prior notice of the service disruptions and were still being kept in the dark. Parents tweeted about long waits and no-show buses. One mother of a seven-year-old boy with autism spectrum disorder shared her frustration about waiting with her son 90 minutes for the school bus on the first day of school and 120 minutes on the second. She said her son "cried for an hour" because of this delay. Some other examples of tweets from September 7:

No bus pickup after school either, school is as confused as I am, no calls returned from bus company. Put student safety first!

So bus company says they haven't even hired driver yet for her route. Expected us to just put [daughter] in cab with no notice. Ridiculous @tdsb

@TCDSB anybody home? Seems all these phone numbers to call and nobody answering?

Day 2 kids are stranded. No school bus! How do u expect these lil ones to have a great school experience?! #HELP #GetOurKidsToSchool

- 62 My Office also received numerous calls from parents frustrated by the boards' and Transportation Group's inadequate response to the disruption.
- 63 As the service problems began to mount, the Transportation Group and boards recognized that it was not busing as usual. One operator called the Transportation Group to advise that it would be unable to service 34 of its routes that day. After receiving complaints about no-show buses from a different operator, the Transportation Group contacted it by phone and was told that it, too, was having difficulties servicing its routes. By 9 a.m. on the second day, the Transportation Group's General Manager told the Toronto District board in an email that this was "one of the worst years" he'd seen. Together, the Transportation Group and the boards began to work in crisis mode, discussing how to resolve the effects of the transportation disruptions – late and stranded students, angry parents and schools – while trying to deal with the underlying cause of too few drivers.
- 64 That afternoon, the Transportation Group and both boards met by teleconference to discuss the service disruptions and to develop an action plan. Rapid communication was deemed the top priority, and after this meeting, general information referring to school bus delays was posted on the Transportation Group's and school boards' websites. Around 1 p.m., both boards shared information about the service disruptions on Twitter:

From Toronto DSB (@tdsb):  
Important information for parents about significant bus delays and possible cancellations. [link to website]

From Toronto Catholic DSB (@tcdsb):  
Driver shortages causing school bus delays at some TDSB & TCDSB schools. Latest updates online: [link to website]

- 65 Both boards attributed the service disruptions to a serious, unanticipated driver shortage. On its website and Facebook, the Toronto District board said the public "should expect significant delays and the possibility that some buses may not be running due to an **unanticipated bus driver**

**shortage**” [emphasis added].<sup>9</sup> The Toronto Catholic District board relayed a similar message, indicating that it “was advised **today** that a **serious driver shortage** is impacting many of [its] schools” [emphasis added].

- 66 Around 3:30 p.m., the boards notified schools that this information had been posted and asked them to contact parents. They also asked their schools to help identify which routes and students were affected by the service disruptions, since this information wasn’t readily available from the Transportation Group or the bus operators. Although the service contract required operators to share this information with the Transportation Group, this didn’t consistently occur.
- 67 News media quickly picked up these communications and began reporting on the service disruption. According to one article, the boards blamed a “sudden and unexpected” driver shortage for the delays,<sup>10</sup> with the spokesman for the Toronto Catholic board calling the shortage a “unique and unprecedented situation.”<sup>11</sup> However, a spokesman for the Toronto District board was also quoted as saying the board knew of potential concerns in advance:

Last week we started to hear about potential number problems, but no one anticipated this to be an issue, otherwise we would have told everyone.<sup>12</sup>

- 68 As the crisis unfolded, school administrators and staff bore the responsibility of communicating with parents about the delays, fielding complaints, and arranging supervision and transportation for students. This burden fell primarily on principals, who were often contacted by parents who could not get through to the Transportation Group and bus operators because phone lines were busy or went straight to voicemail. Principals were quickly overwhelmed by the number of complaints they received, the

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<sup>9</sup> Toronto District School Board Facebook post (2016 September 7), online: <[https://www.facebook.com/toronto.dsb/posts/10157324839770431?comment\\_tracking=%7B%22tn%22%3A%22O%22%7D%3E](https://www.facebook.com/toronto.dsb/posts/10157324839770431?comment_tracking=%7B%22tn%22%3A%22O%22%7D%3E)>.

<sup>10</sup> Andrea Gordon, “Bus bungle starts school year in chaos for thousands of students”, *The Toronto Star* (8 September 2016), online: <<https://www.thestar.com/yourtoronto/education/2016/09/08/driver-shortage-delays-hundreds-of-toronto-school-buses.html>>.

<sup>11</sup> Courtney Greenberg, “Mom waited 1 hour at bus stop for kids to come home but they never showed up”, *CTV News Toronto* (7 September 2016), online: <<http://toronto.ctvnews.ca/mom-waited-1-hour-at-bus-stop-for-kids-to-come-home-but-they-never-showed-up-1.3062996>>.

<sup>12</sup> The Canadian Press, “Bus driver shortage leaves about 1,000 students stranded, delayed”, *The Globe and Mail* (8 September 2016), online: <<http://www.theglobeandmail.com/news/toronto/bus-driver-shortage-leaves-about-1000-toronto-students-stranded-delayed/article31762481/>>.

need to quickly disseminate information to affected parents, and the practicalities of dealing with late and stranded students. The Toronto School Administrators' Association summarized these concerns in an email to the Toronto District board on the afternoon of the second school day:

...**There are schools where 70 or more students have not been picked up by buses.** It is not feasible for [a] single admin [staff] with one office staff to contact this many families within a reasonable time frame. Also some [principals] have informed us that there are parents who cannot get to the school to pick up their children, which puts the onus on principals to find some way to get the children home. Again this is not workable (too many children and too few adults). There are also some parents who cannot be reached by phone.

Third day and beyond: Thursday, September 8...

- 69 When the third day of school began, there still had not been a formal, written notification to parents from the boards or the Transportation Group about the disruptions. Instead, parents were left to obtain updates from social media and news reports.
- 70 Finally, during the day on September 8, the Catholic District board's Director of Education issued a letter to parents, advising that a significant number of students had experienced busing delays, which would be resolved in the coming weeks. In the letter, the board again blamed the disruption on the serious driver shortage and said it had only learned of the issue the previous day. It said, in part:

Dear Parent/Guardian:

As you are aware, the Toronto Catholic District School Board **was informed on September 7<sup>th</sup> of a serious shortfall in the number of school bus drivers** employed by three transportation providers for the Board [...] As a result, a significant number of our students across the City, including Toronto District School Board students, have experienced general delays and both pickup or drop-off interruptions in school bus transportation service this week.[emphasis added]<sup>13</sup>

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<sup>13</sup> Online:

<<https://www.tcdsb.org/ProgramsServices/BoardServices/studenttransportation/Documents/Bus%20Letter%20to%20Parents,%20September%208,%202016.pdf>>

- 71 The board's letter said approximately 1,200 students were directly affected by the service disruption, and their families would receive a separate letter from their school principal with additional information and instructions. The letters from principals informed affected parents that their child's bus route had no driver assigned and urged them to make alternative transportation arrangements "if at all possible" for a few weeks. Parents were asked to contact the principal if this was not possible to canvas alternatives. Some parents complained to our Office that the letters were insufficient and lacked necessary details. A letter was sent on September 13 to update parents about the ongoing disruptions, which again blamed the driver shortage for the ongoing disruption. However, many parents continued to complain to our Office and the board about the lack of ongoing communication.
- 72 It was not until September 9 – the fourth day of school – that the Director of Education for the Toronto District board issued a letter to parents with information regarding the disruption. The letter explained that an unexpected, serious shortfall of drivers had led to significant service disruptions. It indicated that the board first learned of the issue on September 6:

Dear Parent/Guardian,  
On September 6, 2016, the Toronto District School Board (TDSB) was **unexpectedly** informed of a **serious shortfall in the number of school bus drivers** employed by three of our transportation providers [...] As a result, some students attending the city's public and Catholic schools have experienced significant school bus delays and, in some cases, cancellations. [emphasis added]

It is not uncommon to experience minor and isolated transportation issues at the start of every school year, which are resolved within a short period of time. This year, the level of disruption caused by the shortage of bus drivers cannot be solved immediately. While the shortage of bus drivers is beyond the school board's control, we sincerely apologize for this inconvenience and thank you for your continued patience.<sup>14</sup>

- 73 The board indicated that **1,275** students from 50 public schools were directly affected by the disruption and would receive a separate letter from their school. In those letters, parents were assured that students would be supervised from 7:30 a.m. until the last bus departed in the afternoon. The board sent another letter to affected students a week later to provide

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<sup>14</sup> Online: <<http://www.tdsb.on.ca/EarlyYears/Kindergarten/SchoolBusDisruptions.aspx>>



further updates. In his interview with our Office, the board's Director of Education said he felt the board had done everything in its power to keep parents informed. However, parents complained to the board and our Office that these communications failed to provide clear, concrete information about the transportation disruptions.

## **Ignoring the Warning Signs**

- 74 The chaos caused by the service disruptions was largely avoidable. Although the Toronto Student Transportation Group and the Toronto District and Toronto Catholic District school boards repeatedly told my investigators, parents and the media that the transportation disruptions were unforeseeable, there were many indications that September 2016 would be exceptionally challenging for student busing. A key factor involved the new service contracts with bus operators, which were in place for the start of the 2016-2017 school year. As a result of service changes, new operators and drivers would be responsible for many routes, increasing the risk of error.

### **The Transportation Group's Request for Proposal**

- 75 The Toronto Student Transportation Group was required to engage in its first competitive procurement process under the new broader public sector procurement directive in 2016 because its 2007 agreements were expiring.
- 76 The Transportation Group issued a Request for Proposal (RFP) in November 2015. The request was more comprehensive than the 2007 contracts and contained many new or modified provisions regarding service requirements.
- 77 More than 1,700 routes were up for grabs under the RFP. Bus operators bid on "bundles" of 30 routes. Operators were not given information about the location of specific routes and were not able to limit their bid to a specific geographic area.

### ***Contract award process***

- 78 Eight bus operators submitted proposals, three of whom had not previously worked with the Transportation Group. As part of a three-stage evaluation process, the bidders had to meet several requirements, demonstrate a technical capacity to provide service, and provide competitive pricing. They also had to provide information about their driver retention/recruitment



strategy, external and internal communication strategies, and their administrative and/or operations team, among other matters. A fairness commissioner was engaged to monitor, advise, and provide expert procurement guidance during the RFP process. Seven bidders were successful; the eighth was automatically disqualified because it was the most expensive.

- 79** In its final report to the school boards on the process, the Transportation Group noted that the new broader public sector procurement requirements<sup>15</sup> had impacted how it procured student transportation, and that it had “very little control over who is awarded services.” The Transportation Group was hesitant about the number of routes that would be awarded to two bus operators that had had not worked with it before. In the past, new operators were limited in the number of routes they were awarded. However, the RFP fairness commissioner told the Transportation Group that it could not restrict the number of routes allotted to new entrants to the Toronto market. These two operators were among those that ultimately had driver shortages in September 2016.
- 80** Service contracts were awarded in February 2016. The contracts were for six years, with two optional one-year extensions.

***Ambiguity in the RFP***

- 81** Some bus operators we interviewed told us the language in the RFP was ambiguous, causing them to misinterpret provisions about route allocation and pricing. Although the Transportation Group issued an addendum to the RFP responding to 130 questions from operators, confusion remained.
- 82** For instance, one operator bid on and was awarded 300 routes in February 2016, but later approached the Transportation Group to explain it had not intended to service 300 routes and would be returning 150 of them. The Transportation Group had to distribute these routes to other operators willing to take on additional work. The operator told us it may have misunderstood the RFP, but the information and documentation submitted as part of its bid clearly demonstrated it only had resources to operate 150 routes. Another operator misunderstood the wording in the RFP regarding the pricing guidelines per route. These misunderstandings occurred even though operators had the opportunity to ask questions before submitting a bid.

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<sup>15</sup> As noted in Paragraph 26.

***A learning experience***

- 83** While there were multiple contributing causes for the busing disruptions in September, many of the underlying issues originated from the structure of the 2016 RFP. These issues might have been avoidable if the RFP had been drafted differently, with a greater emphasis on service reliability and a lower emphasis on price. Although it will be some time before the Transportation Group conducts a new RFP for transportation services, the lessons learned during the 2016 RFP should guide future procurements for both the Toronto Student Transportation Group and other consortia throughout the province. The recommendations in this report will help ensure the Transportation Group obtains adequate and reliable transportation services in a manner that is open, fair and transparent, as called for in the broader public sector procurement requirements.
- 84** For instance, the Toronto Student Transportation Group failed to give bus operators specific route information during the bidding process. Operators were expected to rely on the Transportation Group to ensure routes were assigned in areas where the operators had depots, wanted to work, and had engaged drivers.
- 85** Other transportation groups in the province, such as the Student Transportation Services of York Region, told us they provide operators with copies of the specific routes available to be bid on, including the length and timing of the route. Minor changes can be made to some routes, especially those servicing students with special needs, but an estimated 90-95% would remain unchanged. Student Transportation of Peel Region told us it uses a similar route bidding process.
- 86** In future, the Toronto Student Transportation Group should ensure that its RFPs allow bus operators to bid for specific routes in clear geographic zones.

**Recommendation 1**

**The Toronto Student Transportation Group should ensure future RFPs allow bus operators to bid for specific routes in clear geographic zones.**

- 87** The evaluation criteria used in the RFP were also problematic. It did not consider whether operators had a history of successfully operating in Toronto. In at least one case, the evaluation committee had difficulty determining whether an operator had the resources to service the number of routes bid on. The Transportation Group is aware of these issues. In the

wake of the September 2016 service disruptions, the Toronto District board asked its staff to prepare a report for its Finance and Accountability Committee regarding the causes of the driver shortage and what could be done to prevent its recurrence. A draft version of the report recommended that the Transportation Group:

develop language for future RFPs that adds more weight to experience in operating in urban areas, and to operators who have more resources to draw upon in these situations and less emphasis on price.

- 88 However, the final report – dated September 28, 2016, and signed off by the Toronto District board’s Associate Director responsible for transportation – did not contain this recommendation, or any of the other eight recommendations put forward in the draft report. To prevent future busing disruptions, the Transportation Group should consider including language in future RFPs prioritizing operators with experience operating in urban areas and with greater resources.

#### **Recommendation 2**

**The Toronto Student Transportation Group should consider including language in future RFPs prioritizing operators with experience operating in urban areas and with greater resources.**

#### Driver recruitment and route planning

- 89 In February 2016, after bus operators learned how many routes they had been awarded, some asked for route location details so they could start recruiting drivers.
- 90 Operators typically hold a series of open houses to recruit bus drivers for the coming school year. As part of these open houses, operators share the routes they have been assigned, and interested drivers sign up, indicating which route they would like to drive. Routes are inextricably connected to the recruitment of drivers – drivers often choose their employer based on the route they want to drive. Accordingly, it is important for operators to know which routes they are responsible for, so they can recruit drivers effectively.

### ***Mock routes and spring driver recruitment***

- 91 The Toronto Student Transportation Group was well aware of the importance of routes to the driver recruitment process. In March 2016, it issued “mock routes” – generally based on routes from previous years, taking into account the location of driver depots – to help operators during the spring recruitment cycle. This was a new approach. Operators were asked to review the mock routes, and the Transportation Group said it would be “tweaking the route allocations” based on feedback received. All operators we spoke with said they interpreted this to mean the mock routes would reflect the location of the finalized routes and that they could rely on them for driver recruitment. Several operators displayed the mock routes at open houses to help bus drivers determine whether the operators had routes that interested them.
- 92 Based on the feedback received, the Toronto Student Transportation Group made minor changes and reissued the mock routes in April 2016. The Planning Supervisor sent the revised versions to the operators in an email, noting that although not necessarily the “actual routes,” they were “**a good indication**” of the location of the final routes.
- 93 As the spring recruitment process began, the Transportation Group asked operators to maintain and periodically submit lists of drivers who had committed to working for them. Aware of perennial driver shortages and the dynamics of their employment, the Transportation Group intended to cross-check the lists against each other to determine where drivers had made multiple commitments.

### **Last-minute route changes**

- 94 On June 2, 2016, after the Transportation Group had planned bus routes and operators had recruited drivers for those routes, the board of trustees for the Toronto Catholic District School Board voted to stop busing students who did not meet its transportation policy’s eligibility criteria (e.g. they lived too close to school). Because the board had a widespread practice of transporting ineligible students, this decision affected more than 7,000 students and stood to save the board some \$2.85 million per year.
- 95 The Transportation Group was notified of this decision and staff began the process of removing thousands of ineligible riders and adjusting hundreds of affected routes. The changes, which primarily affected big-bus routes, necessitated a complete re-planning and optimization of all routes. We were told this process is painstaking and time-consuming. Moreover, it

needs to be completed three times whenever changes are made – once for each board, and once for all routes. This process sets the baseline for the boards’ cost-sharing methodology.

- 96** However, the trustees’ decision proved to be incredibly unpopular, and in a unanimous vote on June 27, 2016, the board reversed its position. This about-face meant the transportation planning staff had to add all of the removed students back to the computer system and generate new routes, which again had to be optimized three times. The Transportation Group’s General Manager told our Office that this process took over a month, and delayed the finalization and publication of big bus routes until August. Typically, the Transportation Group aims to have routes substantially completed before school lets out in June, so information can be sent home with students’ final report cards.
- 97** This change of heart also resulted in pressure from the Toronto District board on the Transportation Group to cut transportation costs in other ways. Planning staff looked for efficiencies in existing routes, primarily by shortening the break between routes serviced by the same bus. This meant that if a bus were delayed for any reason, the delay might snowball and affect many other students. All of these changes, optimizations, and re-optimizations affected the validity of the mock routes that were issued in March and April 2016 to guide driver recruitment.

### Bus operator meeting in August 2016

- 98** With the start of school only a few weeks away, the Transportation Group scheduled a meeting for August 18, 2016, for bus operators to receive their finalized routes. Operators were asked to bring a dispatcher knowledgeable about Toronto geography so they could swap routes if they did not have operational capacity or drivers to service particular routes.
- 99** At the meeting, operators were given hard copies of their routes. We were told that as soon as some operators looked at the routes, it became clear they were different from the mock routes issued in March and April 2016. One operator who had transported students in Toronto for decades told us: “None of the mock routes even remotely showed up in our [final] routes. Everything was just a wholesale change.” That operator immediately recognized the problem this would cause for driver retention and spoke with the Transportation Group’s General Manager. Other operators raised similar concerns, and two days later, the General Manager sent an email to all bus operators to address the complaints and remind them that the mock routes had never been intended to reflect final routes. Operators

were again encouraged to trade routes among themselves. One operator responded to this email expressing skepticism that trading routes would resolve its issues, because entire schools it had expected to service had been assigned to a different operator. In his interview with our Office, the General Manager admitted that the discrepancy between the mock and final routes "...may have led to some issues with drivers."

- 100** In the days that followed, the Transportation Group continued to make changes to the "final" routes that operators were given at the August meeting. These changes were largely to accommodate the hundreds of last-minute transportation requests that are traditionally received in the lead up to the first day of school. However, bus operators said things were different in 2016. The changes were more dramatic and required drivers to pick up students in areas they had not agreed to initially. Some routes became very long, requiring drivers to criss-cross the city each morning and afternoon. Given the propensity of drivers to walk away from routes they were dissatisfied with, the operator was concerned these changes would exacerbate the emerging driver shortage.

## The wheels fall off the bus

### *Too few drivers*

- 101** By the last week of August, it was clear to the Transportation Group and bus operators that they might have a problem ensuring every bus route was serviced. The Transportation Group asked operators to provide a list of routes with assigned drivers. Operators responded that **nearly 100 routes** had no driver assigned (i.e. they were "open" routes). After the Transportation Group facilitated route trades amongst operators, this number fell to 60. The General Manager remained concerned and wrote on August 25, 2016, to the operations committee, which includes senior staff from each board, expressing that there might be an issue with some bus operators. That same day, he also wrote directly to senior employees at both boards to alert them that:

It has been a far more stressful and chaotic summer than normal because of the new contract and the late news about the [transportation for non-eligible students] from the Boards...We had our start-up meeting with the carriers and reviewed expectations for the upcoming school year...We've been securing driver lists each week for the last month to gauge how well the carriers have recruited and supported their driver needs. **There is some concern that some**



**companies may not be as prepared as they think they are...[emphasis added]**

- 102** This email, however, also downplayed the seriousness of the potential problem and contained numerous assurances about the number of drivers and the steps being taken to minimize the consequences of any disruptions. As a result, this warning seems to have had little effect, and officials from both boards later told us they did not appreciate the magnitude of the impending situation.
- 103** Also on August 25, 2016, the General Manager again wrote to bus operators to get detailed information about which bus and driver would service each route. He heard back on August 30 that one operator had 42 open routes. That same day, after learning that a different operator had 16 open routes, the General Manager described the situation as “dire” in an email to the Transportation Group’s senior staff.

***Too many changes, impossible routes***

- 104** For routes that were assigned drivers, “dry runs” in the week before school revealed logistical problems with the routes as planned. In some cases, the routes took much longer to complete than the Transportation Group estimated, meaning the driver could not pick up or drop off students as scheduled. Drivers were frustrated by what one described as “impossible” routes, as well as the constant changes to planned routes in the week before school began.
- 105** In the days leading up to the start of school, one operator emailed the Transportation Group to complain that routes had changed completely after drivers had selected routes and completed dry runs. These changes had consequences. An operator told our Office about a new driver who, after doing a trial run for a route, accepted the assignment and took possession of a school bus. However, the route subsequently changed drastically. Unhappy with the new route, the driver quit without telling the operator or returning the bus. It took two days and a call from a school principal for the operator to find out that the route had not been serviced on the first two days of school. The operator found out later that the driver went to work for a different operator and had abandoned his bus at a school. When the operator spoke to the driver, the driver explained that his route changed completely so he decided to work for someone else.



## What the boards knew

- 106** Aware that driver shortages at several operators would lead to service disruptions at the start of the school year, the Transportation Group's Operations Manager drafted an update for the Toronto District board, indicating that:

...we have been informed by several carriers that there will be driver shortages for the first week of school. We are working closely with those carriers to try and minimize the extent of the problem but **we need to be aware that service could be significantly impacted.** [emphasis added]

- 107** On August 31, 2016 – about a week before school started –this warning language was shared with the Toronto District board. A substantially softened version of the notice appeared in the Toronto District board's internal staff bulletin on September 6, 2016, the first day of school:

In the first year of the [transportation] contract we will ordinarily experience some growing pains that may manifest as service issues. For one, many of the carriers are starting new routes and some have informed us they **may have driver shortages** for the first week of school...please be aware that **service could be impacted** and we are here to support in any way we can...[emphasis added]

- 108** On September 1, 2016 – the Thursday before the Labour Day long weekend and the start of the school year on Tuesday – the Transportation Group's General Manager emailed transportation officials at each board to advise that some bus operators were "**severely short drivers.**" He said the Transportation Group was working to minimize the gap between routes and drivers, but that "**significant service delivery issues**" should be expected. While the General Manager had previously told the boards about the driver shortage, this was the first time that he indicated it would be severe.

- 109** The Toronto District board did not issue any public communication in response to this warning.

- 110** At the Toronto Catholic District board, its Associate Director emailed a senior colleague about the potential service disruption: "**You need to let everyone know!**" The Toronto Catholic District board's Director of Education asked her staff to work with a communications officer to prepare a statement. However, no communication to parents or staff occurred.

- 111** In late September 2016, in response to our Office’s pending investigation, the Associate Director emailed the Transportation Group’s General Manager about the implications of an Ombudsman investigation. The email said, in part:

...when I responded to [the General Manager’s] email on September 1<sup>st</sup> [...] and I asked [staff] to let everyone know about the potential disruption from the lack of drivers, and the Director asked that a communication be prepared to go out to the schools...why didn’t something go out on the Friday? Why did we wait until the 2<sup>nd</sup> day of school, as did TDSB? Did you tell [board staff] that based on past experience it was covered? This is our only vulnerability?

- 112** According to the information provided to our Office, the Transportation Group’s General Manager did not respond to this email.
- 113** No public communication about the anticipated driver shortage and service disruptions was issued by the Transportation Group or either board before school began. According to emails we reviewed, the General Manager was reluctant to refer to a driver shortage and suggested that call centre staff say they were working with operators to “address operational concerns.”
- 114** Both boards publicly stated that they did not learn about the driver shortage or the possibility of service disruptions until the school year started. In interviews with our Office and in its letters to parents, the Catholic District board said the Transportation Group told it about the problem on Wednesday, September 7, 2016, while the Toronto District board said it was told on Tuesday, September 6. However, our investigation clearly indicates that both boards were aware of driver shortages and significant service disruptions a week before school began and took almost no action on that information.
- 115** When asked about this, the Catholic District board’s Associate Director told our investigators there had been a gap in communication and the board should have alerted parents and other stakeholders when it received information from the Transportation Group in the days before school began. The Toronto District board’s Director of Education took a different position, saying that the information he had been provided before school began wasn’t concerning enough to justify issuing an alert.
- 116** In the first acknowledgement of responsibility that our Office saw or heard, the Transportation Group’s General Manager told our investigators he did not fully recognize the scope of the impending disaster. He explained that

he was not overly concerned with the number of open routes because there were always open routes at the start of the school year. His error, he said, was not taking into account that the routes were concentrated among three operators. The concentration of routes with so few operators made it almost impossible to arrange temporary coverage. However, this explanation is at odds with emails we reviewed, which revealed that the General Manager and his staff were fully aware and concerned that specific operators had high concentrations of open routes – notably the email he sent on August 30, 2016, which described the situation with one operator as “dire.”

### **Radio silence**

- 117 Despite warning signs, the Transportation Group and the boards did not truly appreciate the seriousness of the impending busing disruption. The information that was available about the driver shortage should have led the Transportation Group and the boards to notify otherwise unsuspecting families that they should expect some delays and disruptions. Notification in the week before school began would have given affected parents and school officials some time to arrange alternative transportation and child supervision, as well as ensure they knew to expect severe disruptions.
- 118 Communication between the Transportation Group and the boards must be improved. Each year in early August, the governance committee should meet with the operations committee to discuss transportation readiness and address any outstanding issues. Communications staff from both boards should also be present at this meeting.

### **Recommendation 3**

**The Toronto Student Transportation Group’s governance committee should meet with its operations committee in early August every year to discuss transportation readiness and address any outstanding issues. Communications staff from both boards should also be present at this meeting.**

- 119 The Transportation Group should also develop a communications protocol that specifies how and when parents, school boards, and other stakeholders will be notified of known or suspected service disruptions. Consideration should be given to when to use social media, news media and automated calling systems to alert stakeholders to the disruptions.

#### Recommendation 4

**The Toronto Student Transportation Group should develop a communication protocol that specifies how and when parents, school boards, and other stakeholders will be notified of known or suspected service disruptions.**

- 120 Principals at both boards were largely left to deal with frustrated parents and stranded students without support from board administrators. Many said they were strained by the volume of work and confused about the extent of their communication responsibilities. The boards' policies and the Transportation Group's operation manual provided limited guidance for dealing with this type of situation. During the crisis, the Transportation Group discussed adding another section to its policy regarding principals' communication obligations, but this change was not implemented. To ensure clear communication and division of responsibilities, the Transportation Group should review the operation manual to ensure that the responsibilities of all stakeholders (e.g., board officials, principals, parents, operators) are clearly established. The revised manual should outline clear responsibilities and processes for communicating transportation information and be made publicly available on the websites of the Transportation Group and both boards.
- 121 The revised manual should specifically indicate that schools are responsible for notifying the Transportation Group about the nature of any service disruption affecting them. This would reflect the practice that was put in place informally during the 2016 crisis. School administrators are a reliable and efficient method for determining which bus routes are subject to delays and other issues. In addition, this reporting requirement would allow the Transportation Group to begin working with affected schools immediately to resolve transportation disruptions.

#### Recommendation 5

**The Toronto Student Transportation Group should review its transportation operation manual to ensure that the responsibilities of all stakeholders are clearly established. The revised manual should delineate clear responsibilities and processes for communicating transportation information. The manual should be made publicly available on its website and those of the Toronto District and Toronto Catholic District school boards.**

### **Recommendation 6**

**The Toronto Student Transportation Group should ensure the revised transportation operation manual requires schools impacted by service disruptions to notify it about the nature of the disruption.**

## **Chaotic Communication and Complaint Handling**

- 122** The magnitude of the service disruptions exposed numerous weaknesses in the operators', boards' and Transportation Group's existing processes for communicating delay information to parents, responding to complaints, and investigating reported safety incidents.

### **Bus operators' communication**

- 123** Bus operators failed to communicate timely and accurate information to parents and the Transportation Group as the crisis unfolded.

### ***Updating the delay portal***

- 124** The Toronto Student Transportation Group operates a website that allows its staff, parents, and school officials to check on the status of each school bus route. Under their service contracts, operators are responsible for updating this information in a timely manner. During the service disruptions, however, the delay information provided by operators was often inaccurate or out of date. Parents who checked the website had no way of knowing the real status of their child's bus, and Transportation Group staff who relied on this information to monitor bus routes and respond to parent inquiries were left in the dark. Given the importance of accurate delay information, the Toronto Student Transportation Group should monitor operators' compliance with their contractual obligation to notify schools and parents about bus delays and, in accordance with the service contract's provisions that allow for financial penalties, take remedial steps against operators who consistently fail to do so.

### **Recommendation 7**

**The Toronto Student Transportation Group should monitor whether operators notify schools and parents about bus delays**

**and take remedial steps against operators who consistently fail to do so.**

- 125** When operators did provide information about bus delays, it was sometimes intentionally inaccurate. In one case, an operator reported buses would be “50 minutes late” when in fact there was no driver to cover the route. We were told that this strategy was used because the website did not provide the option of indicating that a bus would not show up. The Transportation Group repeatedly told operators they were not allowed to officially cancel routes, even when they could not be serviced within a reasonable time period.
- 126** The misinformation about bus schedules was frustrating to parents and school officials. We heard of a school principal who checked the delay website and found that the bus was expected to be 50 minutes late. However, the bus never arrived. Later, the principal wrote to the board to complain that the portal was “very deceiving” and that “it would have been better if [the operator] had simply told us that there was no bus instead of saying that it was delayed.”
- 127** In May 2017, staff at the Toronto District board prepared a report for its Finance, Budget and Enrolment Committee,<sup>16</sup> providing a status update on student transportation generally, as well as outlining the steps taken to ensure a smoother and more effective start to bus service in the upcoming 2017-2018 school year. According to the report, a new online transportation portal has been developed to provide the public with improved access to bus delay information. The report indicated the portal would launch in June 2017. To ensure parents and schools are provided with accurate information, the Toronto Student Transportation Group should ensure this portal allows bus operators to disclose when a bus is unable to service a route on a particular day.

### **Recommendation 8**

**The Toronto Student Transportation Group should ensure its new transportation portal allows bus operators to disclose when a bus is unable to service a route on a particular day.**

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<sup>16</sup> Report to the Finance, Budget and Enrolment Committee, Toronto District School Board (10 May 2017), online:  
<<http://www.tdsb.on.ca/Leadership/Boardroom/AgendaMinutes.aspx?Type=A&Folder=Agenda%2f20170510&Filename=170510+Transportation+Contracts+3118.pdf>>.



- 128** Bus operators told us they struggled to get accurate delay information from drivers and that this information was constantly in flux, making it difficult to update the delay website. However, under their service contracts, school buses must be equipped with GPS equipment that allows the Transportation Group and operators to determine its location at all times. The Transportation Group has indicated the GPS system will be fully operational for the 2017-2018 school year, which will allow operators to track the status of their fleets in real time and provide parents and other stakeholders with up to date information.
- 129** Public transit organizations, including the Toronto Transit Commission, commonly use this location information in online applications that can estimate when a bus will arrive at a specific location. The Transportation Group has indicated that it is in the process of providing similar functionality through a “where’s my bus” application. The Toronto Student Transportation Group should expedite this initiative to ensure that information about delayed and no-show buses is shared with parents and school administrators in a timely and accurate manner.

#### **Recommendation 9**

**The Toronto Student Transportation Group should expedite its initiative of using bus GPS information and software to automatically post real-time and accurate information about delayed and no-show buses on its website.**

#### ***Overloaded phone lines, inaccurate information***

- 130** When parents or school officials tried to call bus operators during the crisis, they were rarely able to speak with anyone and often couldn’t leave messages because voice message boxes were full. Even when bus company staff did answer the phone, the information they provided was often inaccurate. Parents were falsely told that buses were on their way or their children had been dropped off at school or home.
- 131** Our investigation found instances when school officials, faced with safety crises, including missing students, were unable to get through to bus operators to obtain information about the student’s possible whereabouts. The Toronto Student Transportation Group also had difficulty communicating with some of its bus operators by phone, even though each operator was supposed to have a dedicated phone line for this purpose. The Transportation Group’s Operations Manager had to ask senior executives of the bus operators for their mobile phone numbers.



- 132 The lack of accurate information and timely communication made an already frustrating situation worse. Parents, schools, board officials and the Toronto Student Transportation Group should be able to reach bus operators to obtain information and complain about service disruptions. The service contract with each operator requires them to maintain a sufficient number of phone lines and office staff to address inquiries from the public, schools, and families. The Transportation Group must reinforce this expectation with each bus operator and take remedial steps against those that fail to meet it.

**Recommendation 10**

**The Toronto Student Transportation Group should ensure that bus operators comply with the service contract's requirement to maintain a sufficient number of phone lines and office staff to address inquiries from the public, schools, and families.**

Toronto Student Transportation Group's call centre

- 133 The Toronto Student Transportation Group operates a call centre, staffed by about 10 contract employees, at the start of each school year – usually from the last week of August until the end of September. In 2016, it was open until mid-October, due to the ongoing transportation disruptions. The call centre responds to questions and complaints from parents and school administrators as everyone becomes accustomed to the bus schedule and routes.
- 134 In the first month of the 2016-2017 school year, the centre was deluged by more than 4,000 calls. The centre and Transportation Group staff received more than 7,500 calls between September and December 2016. Many parents complained to our Office that they were unable to get through to the call centre in September because the lines were constantly busy. According to its statistics, the call centre was only able to answer 54% of calls it received that month. Transportation Group staff told us they couldn't hire additional staff to address the call volume during the transportation disruptions due to office space limitations.
- 135 The Transportation Group is aware call centre staffing was an issue during the crisis. The draft of the September 2016 report prepared for the Toronto District board recommended this be considered in future:

During September [2016] significant communication challenges...occurred. Due to the large volume of disruption in the system the call volume was much higher than expected...In planning for next year, it is imperative that the level of staffing centrally and at all carriers be considered to ensure timely and accurate information is shared.

- 136 In their May 2017 report, Toronto District board staff said the call centre would have additional staffing in the 2017-2018 school year during peak complaint periods. The Transportation Group should ensure its call centre is adequately staffed and resourced to handle the volume of complaints and enquiries received each year. The centre's infrastructure and staff complement should be adaptable to unpredictable and changing complaint volumes.

**Recommendation 11**

**The Toronto Student Transportation Group should ensure that its call centre is adequately staffed and resourced to handle the volume of complaints and enquiries received each year. The centre's infrastructure and staff complement should be adaptable to unpredictable and changing complaint volumes.**

- 137 The Transportation Group should also develop call centre policies and procedures that establish minimum service standards for wait and response times. It should also conduct ongoing trends analyses of complaints and inquiries received, in order to address operator service performance issues and identify opportunities for improvements.

**Recommendation 12**

**The Toronto Student Transportation Group should develop call centre policies and procedures that establish minimum service standards for wait and response times.**

**Recommendation 13**

**The Toronto Student Transportation Group should conduct ongoing trends analyses of complaints and inquiries received in order to address operator service performance issues and identify opportunities for improvements to processes and communication.**

## Muddled complaint process

- 138** Our investigation found that during the crisis, many parents and other stakeholders weren't sure where they should address their transportation complaints. Even if they did know who they should contact, their inability to get through to their child's school, the Toronto Student Transportation Group or bus operators forced them to complain to other organizations. As a result, school principals, board officials, bus operators, and Transportation Group staff all received complaints, but had no centralized system to track issues, resolutions, or follow-up. Accordingly, meaningful complaint statistics and trends about the crisis don't exist.
- 139** According to our interviews, the Transportation Group and boards do not have a procedure to provide parents with information proactively about how to obtain bus service information or complain about issues. They should ensure parents know how to access bus service information and complaint procedures prior to the start of each school year. At present, the Transportation Group's website includes electronic pamphlets that, despite some outdated content, provide much of this information and could serve as a model for future communication with parents.<sup>17</sup>

### Recommendation 14

**The Toronto Student Transportation Group, in combination with the Toronto District and Toronto Catholic District school boards, should proactively ensure that parents know how to access bus service information and complaint procedures prior to the start of each school year.**

- 140** To ensure complaints are dealt with expeditiously and tracked consistently, the Transportation Group, school boards, and bus operators should jointly devise a school bus transportation complaint procedure. This procedure should include a mechanism for recording and responding to complaints, as well as for escalating serious or unresolved complaints. It should also distinguish between requests for information about bus schedules and

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<sup>17</sup> These pamphlets have not been updated to reflect new operators that now provide transportation services to the Toronto boards. "Transportation Brochure", Toronto Student Transportation Group, online: <<https://www.torontoschoolbus.org/wp-content/uploads/2014/05/TransportationBrochure.pdf>> and "Transportation of Students with Special Needs", Toronto Student Transportation Group, online: <<https://www.torontoschoolbus.org/wp-content/uploads/2014/05/TransportationBrochureSpecial.pdf>>.

routes, and complaints about bus service. Parents and other stakeholders should be provided with information about how to access this policy each year.

#### **Recommendation 15**

**The Toronto Student Transportation Group, in combination with bus operators and the Toronto District and Toronto Catholic District school boards, should create a school bus transportation complaint procedure. The procedure should:**

- **create a centralized mechanism for recording and responding to complaints;**
- **include provisions for escalating serious or unresolved complaints; and**
- **distinguish between requests for information about bus schedules and routes, and complaints about bus service.**

#### **Recommendation 16**

**The Toronto Student Transportation Group should ensure parents and other stakeholders are provided with information about how to access the complaint procedure each year.**

### Responding to student safety concerns

- 141** The Transportation Group's call centre uses a priority system (high, medium, low) to categorize the urgency of incoming calls. Our Office was not provided with any policy that governs this determination, although during interviews we were told that "anything that has to do with the safety of the children" is given high priority. The call centre has a Safety Officer who investigates safety concerns brought to the Transportation Group's attention and, when incidents occur, ensures that the proper protocols were followed by the bus operator and an incident report documents the safety issue. We were told that the Safety Officer tracks incident reports to determine if drivers or bus operators have multiple safety incidents, in which case the officer can ask the operator to retrain the driver to help ensure safety protocols are followed in future. These steps are not documented in any Transportation Group policy or procedure. Regarding student safety, the manual only contains a general "missing student" protocol that outlines the steps that must be taken to find a student who is reported missing, as well as the reporting requirements for such incidents.

- 142 Given the importance of ensuring student safety, the Transportation Group should ensure that its process for identifying and responding to safety incidents is documented in its policies and procedures. Specific steps for evaluating the adequacy of the bus operator’s investigation, incident report, and response should be established, as well as a procedure for following up with and taking remedial steps against operators when these are found to be inadequate.

**Recommendation 17**

**The Toronto Student Transportation Group should establish clear steps for evaluating the adequacy of the bus operator’s investigation, incident report, and response to safety incidents.**

**Recommendation 18**

**The Toronto Student Transportation Group should follow up with and take remedial steps against operators who fail to adequately investigate, report, and respond to safety incidents.**

**Recommendation 19**

**The Toronto Student Transportation Group should document its process for identifying and responding to safety incidents in its policies and procedures.**

- 143 The service contracts between bus operators and the boards require that all drivers be trained in school bus safety programs. The agreement sets out the minimum time that drivers must spend in training on various subjects and how frequently they must take refresher courses. Bus operators must provide the boards with the dates and agendas for this training, and board staff have the option to attend the sessions. The service contracts also allow the boards to appoint an independent organization to perform a driver safety audit.
- 144 According to the service contract, one vital aspect of the training – the “Purple Equals Parent” program requirements – lasts 30 minutes and only needs to be provided to new drivers. New drivers must also receive four hours of training on “awareness of sensitivity” for special needs students and accessibility requirements, including the requirement to provide door-to-door transportation for students with special needs.

- 145** Given the severe impact that mistakes can have on student safety, the Toronto Student Transportation Group should ensure future service contracts with bus operators provide drivers with initial and ongoing annual training about each program's procedures and importance. In cases of repeated or egregious errors, the Transportation Group should carefully consider enforcing the contractual penalties (\$2,000 per occurrence) against operators that fail to adhere to the Purple Equals Parent program requirements. The Transportation Group should also consider adding provisions to future service contracts allowing it to penalize operators that contravene the transportation policy for students with special needs, such as the requirement for door-to-door transportation.

**Recommendation 20**

**The Toronto Student Transportation Group should ensure future service contracts require that bus operators provide drivers with both initial and ongoing annual training about the procedures and importance of the "Purple Equals Parent" program and the requirement to provide door-to-door transportation for students with special needs.**

**Recommendation 21**

**The Toronto Student Transportation Group should carefully consider enforcing contractual penalties against operators with bus drivers that consistently or egregiously fail to adhere to the "Purple Equals Parent" program requirement.**

**Recommendation 22**

**The Toronto Student Transportation Group should consider adding provisions to future service contracts allowing it to penalize operators that contravene the transportation policy for students with special needs, such as the requirement for door-to-door transportation.**

## Stopgap Solutions

- 146** By the second week of the 2016-2017 school year, the transportation disruptions began to improve for most students. The Transportation Group worked with bus operators over the first weekend to minimize the impact of the driver shortage, parents received communication about the disruptions, and contingency plans were finally developed and in place to supervise stranded students. Some routes were modified to ensure that students were transported to and from school, albeit at inconvenient times. By September 15, 10 days after school began, 1,400 students continued to be affected by service delays, although all routes were serviced (17 buses were scheduled to arrive late in the morning; three left late in the afternoon). These stopgap measures made it possible for students to get to and from school each day while the Transportation Group and bus operators worked to resolve the driver shortage.
- 147** As of January 2017, some **40** routes still did not have permanent drivers. However, all were being serviced by a designated spare driver or taxi, and the Transportation Group’s manager told us that no students were negatively affected.

## Taxi program

- 148** During the busing crisis, taxis were sometimes hired to fill the gap left by the bus driver shortage. Some bus operators arranged and paid for taxi companies to provide coverage for routes without drivers, especially those servicing students with special needs. The Catholic District board also instituted a taxi voucher program. It distributed approximately 15,000 vouchers to schools to use as a last-resort method of transporting students, although at the time of our interviews, the board did not know how many were ultimately used. In addition, the Toronto Student Transportation Group arranged and paid for taxis for some stranded students requiring immediate assistance.
- 149** In each case, parents needed to approve taxi transportation for their child, and taxis were generally not used for students under nine years of age. Bus operators were also required to notify the student’s school when they subcontracted a bus route to taxi drivers. We heard that some parents were uncomfortable having their children transported by a different, unknown taxi driver each time. Others were concerned that taxi drivers lacked the training and knowledge to transport students, especially those with special needs. The Transportation Group told us it relied on bus operators to communicate safety instructions and protocols to taxi



companies, and that it had no mechanism to oversee taxi driver compliance. The expectation is that bus operators will only subcontract routes to taxi companies that are listed as vendors of record with the Toronto boards.

- 150** This lack of oversight is troubling, and our investigation found several instances where student welfare was compromised because taxi drivers failed to follow basic safety measures. One vice-principal reported that a vulnerable student had been left by a taxi driver with a passing adult near the school. In explaining the situation to board staff, the vice-principal wrote:

The taxi pulled over to the side of the street, rolled down the window and asked an adult passing by if they were a teacher at the school and if they could take the student inside. The passerby, who happened to be a teacher, took the student into the school. The student wasn't able to speak his name or indicate where he was supposed to go. The driver left the student with the adult and didn't confirm that the adult was a teacher...[T]his could have been a serious situation.

- 151** Our Office also received a complaint from the mother of a 15-year-old student with physical and intellectual disabilities who was supposed to always be dropped off with a responsible adult. Instead, a taxi driver dropped her off at the back of the school without staff supervision. The bus operator's investigation confirmed that the taxi driver's behaviour was not in accordance with policy and procedure, and the driver was removed from the route.
- 152** There were also issues with late and no-show taxis. We heard of one school where taxis consistently arrived 60 to 90 minutes after the end of classes, requiring three staff members to supervise a group of stranded students.
- 153** The service contracts between the boards and the operators require that operators obtain the board's permission before subcontracting any work, including to taxis. Subcontractors must abide by all terms of the service contract, and operators are responsible if their subcontractor fails to do so. However, there are limited mechanisms that would allow the Transportation Group to verify whether taxi subcontractors are in compliance with the service contract.
- 154** If the Toronto Student Transportation Group and the Toronto boards are going to grant bus operators permission to subcontract routes to taxi drivers, they need to ensure taxi drivers are aware of and comply with

basic safety instructions and protocols contained in the service contract. The Toronto Student Transportation Group should ensure that bus operators who subcontract work to taxi companies comply with the service contract's requirements, including that they provide instruction and training to taxi drivers before they begin picking up students. When deciding whether to approve an operator's request to subcontract work to a taxi, the Transportation Group should ensure the taxi is being used as a last resort and that the same taxi driver will service the route whenever possible.

**Recommendation 23**

**The Toronto Student Transportation Group should ensure that bus operators who subcontract work to taxi companies comply with the service contract's requirements, including that they provide instruction and training to taxi drivers before they begin picking up students.**

**Recommendation 24**

**When deciding whether to approve an operator's request to subcontract work to a taxi, the Toronto Student Transportation Group should ensure that the taxi is being used as a last resort and that the same taxi driver will service the route whenever possible.**

Route modifications

- 155 In addition to facilitating route trading and redistribution, the Toronto Student Transportation Group modified some open routes (those without drivers), primarily by scheduling buses to take on multiple additional routes. Bus operators, on their own initiative and without notifying the Transportation Group, modified routes in the same way. Doubling up routes in this manner ensured students were transported to and from school, although often at inconvenient times. However, the modified routes created a new set of problems, with students arriving at school very early in the morning and leaving late in the afternoon. The emails our investigators reviewed suggest the Transportation Group and the boards did not check with schools before making these changes to ensure students were supervised before and after school. One principal at an affected Catholic District school wrote on September 12 to express her concerns to senior board and Transportation Group management:

I am beside myself right now! I reviewed the pickup time for the students on [a specific route.] Pickup time starting at 7 a.m. There are many issues with this...Who is to meet the students when they get [to school] before 8 a.m.? Our educational assistant? The teachers? All are unionized. Me? I will do this, but what happens on the days I cannot make it in before the students arrive? I realize that this is temporary – how long?

- 156** In other instances, students were scheduled to arrive substantially after classes began each day. One principal complained to board officials that the first of nine stops on a bus route was scheduled for 8:27 a.m., even though school started at 8:30 a.m. Another principal complained that parents were given little notice of modified pickup and drop-off times that were to go into effect the following day. For many parents, these changes were difficult to accommodate, given their work schedules and other commitments. Similarly, school administrators were left to ensure staff were available to supervise and meet students at new and unexpected times. In the future, the Toronto Student Transportation Group, the Toronto District and Toronto Catholic District school boards should ensure affected schools and parents are provided adequate and reasonable notice before they modify students' pickup or drop-off times.

#### **Recommendation 25**

**The Toronto Student Transportation Group, the Toronto District, and Toronto Catholic District school boards should ensure that parents and schools are provided adequate and reasonable notice before they modify students' pickup or drop-off times.**

#### Increased hours of student supervision

- 157** By the second day of transportation disruptions, the Toronto District board had determined that extended hours of supervision were required for affected students. In the days that followed, schools were instructed to arrange this, and principals were responsible for finding qualified employees willing to work the hours on short notice.
- 158** The Catholic District board also informed principals that they might need to make arrangements for student supervision before and after school. According to emails we reviewed, it took longer for that board to implement this directive, due to a smaller pool of staff resources.

- 159 Although the transportation disruptions in 2016 were worse than usual, we repeatedly heard that they are a common feature of the back-to-school process. Each school board should proactively develop and implement contingency staffing plans to ensure adequate student supervision if and when transportation disruptions occur. The plans should include clear protocols regarding emergency staff assignments to supervise students stranded as a result of service disruptions.

**Recommendation 26**

**The Toronto District and Toronto Catholic District school boards should proactively develop and implement contingency staffing plans to ensure adequate student supervision if and when transportation disruptions occur. The plans should include clear protocols regarding emergency staff assignments to supervise students stranded as a result of service disruptions.**

Driver recruitment and additional bus operators

- 160 Bus operators continued to aggressively recruit drivers in September 2016, but this was offset by ongoing driver attrition. Some drivers quit entirely; others were hired by competing operators. In an email to operators a week into the crisis, the Toronto Student Transportation Group's General Manager asked them to stop hiring drivers away from other carriers until the service disruptions were resolved.
- 161 The Transportation Group also spoke with charter bus operators on its approved vendor list to see if they could service any of the open routes. These operators declined the work after being shown the available routes. The Transportation Group also unsuccessfully approached companies it had worked with in the past, other operators who had expressed interest in doing so, and the one operator whose bid on the 2016 RFP was not successful. However, the Toronto District board's permanent fleet of 13 buses and staff drivers agreed to provide coverage to open routes.

**Root of the Crisis**

- 162 The busing crisis of fall 2016 was not a discrete event, but a symptom of underlying systemic problems. The two school boards and the Toronto Student Transportation Group sought to identify and address some of these root causes, during and after the disruptions.

## Reviews and post mortems

- 163** In an email from the second week of September, the Transportation Group’s General Manager laid out different transportation strategies and addressed what could be done to avoid disruptions in future. His email noted that it was “tough to say absolutely” how to prevent the problem from recurring, but said most bus operators and drivers would continue to service the same routes the following year, minimizing the possibility of driver shortages. He also said new software might allow the Transportation Group to complete its planning for special education bus routes sooner, allowing drivers to commit to specific routes earlier in the summer.
- 164** The Transportation Group met with bus operators in December 2016 to better understand the factors that led to the driver shortage. According to the meeting’s minutes, participants identified three key factors: Operators were given routes in unexpected geographic areas, routes were frequently changed, and bus drivers were leaving the profession in general. Four strategies were identified to ensure better service in the next school year: Distributing routes earlier, improving communication, imposing a blackout period on changes at the start of the school year, and hosting a workshop for operators.
- 165** The May 2017 report to the Toronto District board identified several factors that led to the transportation disruption, including a provincewide driver shortage, a new service contract with operators that required them to work in new areas, and a delay in assigning routes to operators.
- 166** The report set out the steps taken by the Toronto District board, the Transportation Group, and bus operators to prepare for the 2017-18 school year, including:
- Ongoing meetings with bus operators to discuss concerns, plan for the coming year, and collaborate on improving the transportation system as a whole;
  - Obtaining information about which students require transportation sooner, allowing the Transportation Group to distribute routes to bus operators one month earlier than under the previous process;
  - Requiring weekly updates from operators during the summer about driver coverage for each route;
  - Enhanced call centre staffing during the start of the school year;

- The creation of a transportation portal which will allow parents to receive bus delay updates from operators directly;
- Ensuring that all buses are equipped with GPS to allow operators to track their location in real-time. The Transportation Group is also working on an initiative to provide real-time information about the location and status of individual buses through a “where’s my bus” application;
- Connecting principals from schools that specifically serve students with special needs with bus operators to provide training, advice and insight on their schools’ issues with transportation; and
- Reviewing and updating the Toronto District board’s transportation policy.

**167** The report also indicated that the Transportation Group was in the process of obtaining new route planning software, which it expected to increase efficiency and automation. As well, it noted efforts were being made to improve the Transportation Group’s governance structure through increased harmonization between the Toronto boards.

**168** An advisory group has been formed to assist in identifying systemic busing issues. This group consists of superintendents, school principals, bus operators, transportation staff, and members with special education expertise. Given the importance of improving communication and consultation on transportation matters, the Transportation Group should ensure that terms of reference are drafted to guide the group’s work and that minutes of its meetings are posted to the Transportation Group’s website.

**Recommendation 27**

**The Toronto Student Transportation Group should draft terms of reference to guide the advisory group’s work.**

**Recommendation 28**

**The Toronto Student Transportation Group should post minutes of the advisory group’s meetings on its website.**

**169** No one we spoke to could provide a full estimate of the total additional expenses associated with the disruption, although the Toronto District board estimates the cost of additional student supervision alone at

approximately \$50,000. After receiving legal advice about these provisions, the Transportation Group's General Manager warned operators in the second week of September about the possibility that penalties and cost recovery might be imposed under service contracts. The Transportation Group told us the boards issued \$264,077 in penalties against bus operators.

## Route planning and allocation

- 170** Several decisions by the boards resulted in bus routes – especially big-bus routes – not being finalized until August, substantially after they are usually completed. The biggest of these was the Catholic District board's request to remove (and then re-add) non-qualifying students to its routes. The Toronto District board also directed the Transportation Group to optimize bus routes in an attempt to reduce transportation costs. In the meantime, bus operators recruited drivers based on mock routes that ended up bearing little relationship to the routes they were ultimately assigned. Drivers, who are notoriously picky about the routes they drive, sometimes refused to take the new routes, resulting in confusion and driver shortages that were worse than expected. As well, some of the routes crafted by the Transportation Group were simply impossible to complete in the time allotted, resulting in further disruption and driver attrition.
- 171** To facilitate the timely planning of bus routes, each school board should provide student transportation information to the Transportation Group as early as possible to facilitate an earlier start to the route planning process. To minimize the possibility of transportation disruptions, decisions affecting student transportation should only be made after consulting Transportation Group management regarding the likely impact of the decision. Similarly, requests for route optimizations outside the typical route planning process should be considered and approved by the Transportation Group's governance committee. In turn, that committee should consult with Transportation Group management and both school boards about the impact of the request on route planning, driver retention, and transportation efficiency before making a decision.

### **Recommendation 29**

**To minimize the possibility for future transportation disruptions, the Toronto District and Toronto Catholic District school boards should consult with management from the Toronto Student Transportation Group before making decisions affecting student transportation.**



**Recommendation 30**

**The Toronto District and Toronto Catholic District school boards should provide student transportation information to the Toronto Student Transportation Group as early as possible to enable an earlier start to the route planning process.**

**Recommendation 31**

**The Toronto Student Transportation Group's governance committee should provide prior approval for any requested route optimizations occurring outside the typical route planning process.**

**Recommendation 32**

**The Toronto Student Transportation Group's governance committee should consult with Transportation Group and school board management regarding the impact of requested route optimizations before granting approval for the optimization.**

- 172** The Transportation Group should also ensure that any mock routes issued to assist operators in early driver recruitment reflect the areas and schools where operators will be assigned routes. To ensure planned routes can be realistically completed in the time allotted, dry runs should be completed under realistic conditions for all routes to confirm they can be completed on schedule (e.g., the bus should stay at each stop long enough to allow students to load/unload, the route should be driven at the scheduled times).

**Recommendation 33**

**The Toronto Student Transportation Group should ensure that any mock routes issued to assist operators in early driver recruitment reflect the areas and schools where operators will be assigned routes.**

**Recommendation 34**

**The Toronto Student Transportation Group should ensure that all bus routes can be realistically completed in the time allotted. Dry runs should be completed under expected route and traffic conditions to confirm routes can be completed on schedule.**

- 173 In addition, the Transportation Group and the boards should take steps to minimize route changes at the beginning of each school year. The draft of the September 2016 report for the Toronto District board recommended “that a moratorium on route changes be imposed until the end of September to allow time to ensure minimal disruptions throughout the start-up phase.” An official at this board told us a full moratorium might not be realistic, but acknowledged the importance of completing the route planning process as early as possible.
- 174 Even if a full moratorium is not realistic, the Transportation Group can and should develop a policy for student transportation requests that sets out a process and firm deadline. We understand that for the 2017-2018 school year, the Transportation Group set an earlier deadline for submitting student transportation requests, which allowed it to distribute routes to bus operators a month sooner than under the previous process. This new practice should be codified in the Transportation Group’s policy. The policy should also establish clear responsibilities for the Transportation Group, boards and parents, as well as provide for exceptional or compassionate circumstances in which late transportation requests will nonetheless be accommodated.

**Recommendation 35**

**The Toronto Student Transportation Group should develop a comprehensive policy for student transportation requests. The policy should:**

- **Set out a process and firm deadline for submitting requests;**
- **Establish clear responsibilities for the Transportation Group, boards, and parents; and**
- **Provide for exceptional or compassionate circumstances in which late transportation requests will be accommodated.**

- 175 In the lead-up to the first day of school, the Transportation Group required bus operators to deal with routes they could not realistically service because they had no drivers willing to take them. Operators were told repeatedly to trade routes amongst themselves to resolve these issues. However, as it became clear that some were facing a significant driver

shortage, the Transportation Group moved away from the route-swapping approach. In the week before the start of school, and more intensely thereafter, it worked with operators to facilitate route trades to ensure that as many routes as possible were serviced. The Transportation Group told us it facilitated at least 40 trades amongst operators to reduce the number of open routes.

- 176** Given the success of this approach, the Transportation Group should consistently take an active role in matching open routes with interested drivers. The Transportation Group, unlike individual operators, can collect and centralize this information, increasing the efficiency of the matching process. It should ensure bus operators are contractually obligated to provide information on open routes to facilitate the matching process for routes that would otherwise not have an assigned driver.

**Recommendation 36**

**The Toronto Student Transportation Group should take an active role matching open routes with drivers interested in those routes.**

**Recommendation 37**

**The Toronto Student Transportation Group should ensure bus operators are contractually obligated to provide information about open routes and unassigned drivers to allow it to facilitate the matching process.**

**Structural flaws**

- 177** Another systemic issue that likely contributed to the unco-ordinated and inadequate response by board and Transportation Group officials as the busing crisis unfolded arises from the Toronto Student Transportation Group's organizational structure.
- 178** Although the Transportation Group represents the interests of the two school boards that created it, we found that its bifurcated nature negatively affects transportation planning and administration. Three staff members provide services exclusively to the Transportation Group: A General Manager, Operations Manager, and Planning & Technology Manager. Each school board covers 50% of the costs associated with these positions. The General Manager and Planning & Technology Manager are seconded from the Toronto Catholic District board, while the Operations Manager is from the Toronto District board.

- 179** Transportation Group planners are responsible for designing bus routes. They are from the transportation departments of each board. They remain employees of their respective boards, and their salaries and other employment matters continue to be dealt with by the board that hired them.
- 180** Each board has its own transportation policy, and staff at the Transportation Group generally work in silos to administer them. Toronto District board employees working for the Transportation Group report ultimately to the Operations Manager (who is seconded from that board), while Catholic District board employees report to the Planning & Technology Manager (who is seconded from the Catholic board). Each manager is responsible for dealing with the operations management related to “their” board, including interacting with school principals and superintendents on student transportation issues.
- 181** Transportation Group staff told us this separation of operational and administrative functions has an adverse impact on employee morale, as well as on the group’s efficiency and functioning. For instance, there are differences in pay scales between the two boards, which means staff members performing the same job earn different salaries. We were told that even though Transportation Group staff share the same physical space, they have different telephone and computer systems, complicating communication.
- 182** More generally, we found there is a sense of mistrust within and between the Transportation Group and the school boards. We reviewed emails in which senior staff from both boards, including Directors of Education, expressed concerns about the General Manager’s perceived preferential treatment of students and transportation issues at the other board. On occasion, staff of both boards expressed suspicion that Transportation Group staff were “fixing” financial numbers and reports to make their board pay a larger proportion of the transportation costs. The General Manager was well aware of these concerns, telling our investigators: “It’s funny – both boards think I’m playing for the other board.”
- 183** While the Transportation Group is nominally separate from the school boards, in practice staff members are loyal to their home boards and fail to work together as a unit for the combined benefit of both. This attitude is recognized by the boards, which have established differing reporting and pay structures, as well as separate computer and communication systems. To improve student transportation planning, the Transportation Group and boards should work together to remove barriers that prevent Transportation Group staff from working as a cohesive team. Management

must work to foster a culture of co-operation and consultation amongst staff and ensure they all have access to the same resources and technology. While staff may continue to be administratively employed by one school board, this should have no bearing on their employment responsibilities. The Transportation Group should ensure that these changes are reflected in its policies and procedures.

- 184** The May 2017 report to the Toronto District board said efforts were underway to improve the governance structure of the Transportation Group through “increased harmonization” between the boards. This is an important initiative, as a more cohesive, co-operative, and co-ordinated workplace culture could lead to better planning and communication in future.

**Recommendation 38**

**The Toronto Student Transportation Group and the Toronto District and Toronto Catholic District school boards should work together to remove barriers that prevent Transportation Group staff from working as a cohesive team.**

**Recommendation 39**

**The Toronto Student Transportation Group and the Toronto District and Toronto Catholic District school boards should ensure that Transportation Group staff have access to the same resources and technology.**

**Recommendation 40**

**The Toronto Student Transportation Group should ensure that staff employment and reporting responsibilities are independent of the school board that administratively employs them.**

**Recommendation 41**

**The Toronto Student Transportation Group should modify its policies and procedures to reflect the revised organizational structure and staff employment responsibilities.**

## Opinion

- 185** In Ontario, hundreds of thousands of students rely on school buses each day of the school year. Buses are an indispensable lifeline for families who would otherwise struggle to get their children to school. The public expects that this service will be safe and reliable, especially since many students who ride school buses are very young or have special needs. At the start of the 2016-2017 school year, severe and persistent transportation disruptions meant that these expectations were not met for thousands of students in the Toronto District and Toronto Catholic District School Boards. Parents scrambled to get children to school after waiting for buses that never arrived, students rode on buses for hours each day, and vulnerable students were placed at risk.
- 186** My investigation found that, far from being unpredictable and beyond the control of the school boards and Toronto Student Transportation Group, the 2016 transportation disruptions were rooted in their actions and inactions before the start of the school year. A combination of factors contributed to the chaos, including:
- A dysfunctional work environment at the Transportation Group;
  - An untested new transportation service contract;
  - A substantial delay in finalizing many bus routes;
  - Inexperienced bus operators;
  - A new method for dividing and assigning routes;
  - Complete changes in the location of routes for returning operators; and
  - Last-minute and wholesale changes to routes.
- 187** Despite being aware of these factors and the possibility of severe service disruptions before school began, the school boards and Transportation Group failed to communicate effectively amongst themselves or to warn parents and school administrators. They approached the issue of school busing with a sense of complacency and were unprepared when the crisis hit.
- 188** My investigation found the response by the boards and Transportation Group to the delays and disruptions at the start of the 2016-2017 school year was haphazard and reactive. Incomplete policies and procedures meant the Transportation Group, boards, operators, and school officials were unsure of their responsibilities during the crisis. Poor communication

meant that parents and school administrators did not know when or if students would be picked up and dropped off each day. The Transportation Group, bus operators, and even school staff were overwhelmed by the volume of complaints and were unable to effectively respond to them. Both boards laboured to implement contingency plans to ensure student safety and supervision because neither board had proactively developed a strategy for large-scale transportation disruptions. Some responses, such as route modifications and the use of taxi subcontractors, caused additional disruption and student safety issues.

- 189** Accordingly, it is my opinion that the Toronto District and Toronto Catholic District School Board's oversight of student transportation and their response to delays and disruptions at the start of the 2016-2017 school year was unreasonable and wrong under the *Ombudsman Act*.
- 190** I am committed to monitoring the efforts of the school boards and the Toronto Student Transportation Group to address my concerns and to ensuring that tangible steps are taken to improve student transportation.

**Recommendation 42**

**The Toronto District and Toronto Catholic District school boards, as well as the Toronto Student Transportation Group, should report back to my Office in six months' time on their progress in implementing my recommendations, and at six-month intervals thereafter until such time as I am satisfied that adequate steps have been taken to address them.**



## Recommendations

- 191 Given the results of this investigation, I am making the following recommendations:
1. **The Toronto Student Transportation Group should ensure future RFPs allow bus operators to bid for specific routes in clear geographic zones.**
  2. **The Toronto Student Transportation Group should consider including language in future RFPs prioritizing operators with experience operating in urban areas and with greater resources.**
  3. **The Toronto Student Transportation Group’s governance committee should meet with its operations committee in early August every year to discuss transportation readiness and address any outstanding issues. Communications staff from both boards should also be present at this meeting.**
  4. **The Toronto Student Transportation Group should develop a communication protocol that specifies how and when parents, school boards, and other stakeholders will be notified of known or suspected service disruptions.**
  5. **The Toronto Student Transportation Group should review its transportation operation manual to ensure that the responsibilities of all stakeholders are clearly established. The revised manual should delineate clear responsibilities and processes for communicating transportation information. The manual should be made publicly available on its website and those of the Toronto District and Toronto Catholic District school boards.**
  6. **The Toronto Student Transportation Group should ensure the revised transportation operation manual requires schools impacted by service disruptions to notify it about the nature of the disruption.**
  7. **The Toronto Student Transportation Group should monitor whether operators notify schools and parents about bus delays and take remedial steps against operators who consistently fail to do so.**

8. **The Toronto Student Transportation Group should ensure its new transportation portal allows bus operators to disclose when a bus is unable to service a route on a particular day.**
9. **The Toronto Student Transportation Group should expedite its initiative of using bus GPS information and software to automatically post real-time and accurate information about delayed and no-show buses on its website.**
10. **The Toronto Student Transportation Group should ensure that bus operators comply with the service contract's requirement to maintain a sufficient number of phone lines and office staff to address inquiries from the public, schools, and families.**
11. **The Toronto Student Transportation Group should ensure that its call centre is adequately staffed and resourced to handle the volume of complaints and enquiries received each year. The centre's infrastructure and staff complement should be adaptable to unpredictable and changing complaint volumes.**
12. **The Toronto Student Transportation Group should develop call centre policies and procedures that establish minimum service standards for wait and response times.**
13. **The Toronto Student Transportation Group should conduct ongoing trends analyses of complaints and inquiries received in order to address operator service performance issues and identify opportunities for improvements to processes and communication.**
14. **The Toronto Student Transportation Group, in combination with the Toronto District and Toronto Catholic District school boards, should proactively ensure that parents know how to access bus service information and complaint procedures prior to the start of each school year.**
15. **The Toronto Student Transportation Group, in combination with bus operators and the Toronto District and Toronto Catholic District school boards, should create a school bus transportation complaint procedure. The procedure should:**
  - **create a centralized mechanism for recording and responding to complaints;**

- include provisions for escalating serious or unresolved complaints; and
  - distinguish between requests for information about bus schedules and routes, and complaints about bus service.
16. The Toronto Student Transportation Group should ensure parents and other stakeholders are provided with information about how to access the complaint procedure each year.
  17. The Toronto Student Transportation Group should establish clear steps for evaluating the adequacy of the bus operator's investigation, incident report, and response to safety incidents.
  18. The Toronto Student Transportation Group should follow up with and take remedial steps against operators who fail to adequately investigate, report, and respond to safety incidents.
  19. The Toronto Student Transportation Group should document its process for identifying and responding to safety incidents in its policies and procedures.
  20. The Toronto Student Transportation Group should ensure future service contracts require that bus operators provide drivers with both initial and ongoing annual training about the procedures and importance of the "Purple Equals Parent" program and the requirement to provide door-to-door transportation for students with special needs.
  21. The Toronto Student Transportation Group should carefully consider enforcing contractual penalties against operators with bus drivers that consistently or egregiously fail to adhere to the "Purple Equals Parent" program requirement.
  22. The Toronto Student Transportation Group should consider adding provisions to future service contracts allowing it to penalize operators that contravene the transportation policy for students with special needs, such as the requirement for door-to-door transportation.
  23. The Toronto Student Transportation Group should ensure that bus operators who subcontract work to taxi companies comply with the service contract's requirements, including that they

**provide instruction and training to taxi drivers before they begin picking up students.**

- 24. When deciding whether to approve an operator's request to subcontract work to a taxi, the Toronto Student Transportation Group should ensure that the taxi is being used as a last resort and that the same taxi driver will be service the route whenever possible.**
- 25. The Toronto Student Transportation Group, the Toronto District, and Toronto Catholic District school boards should ensure that parents and schools are provided adequate and reasonable notice before they modify students' pickup or drop-off times.**
- 26. The Toronto District and Toronto Catholic District school boards should proactively develop and implement contingency staffing plans to ensure adequate student supervision if and when transportation disruptions occur. The plans should include clear protocols regarding emergency staff assignments to supervise students stranded as a result of service disruptions.**
- 27. The Toronto Student Transportation Group should draft terms of reference to guide the advisory group's work.**
- 28. The Toronto Student Transportation Group should post minutes of the advisory group's meetings on its website.**
- 29. To minimize the possibility for future transportation disruptions, the Toronto District and Toronto Catholic District school boards should consult with management from the Toronto Student Transportation Group before making decisions affecting student transportation.**
- 30. The Toronto District and Toronto Catholic District school boards should provide student transportation information to the Toronto Student Transportation Group as early as possible to enable an earlier start to the route planning process.**
- 31. The Toronto Student Transportation Group's governance committee should provide prior approval for any requested route optimizations occurring outside the typical route planning process.**

- 32. The Toronto Student Transportation Group's governance committee should consult with Transportation Group and school board management regarding the impact of requested route optimizations before granting approval for the optimization.**
- 33. The Toronto Student Transportation Group should ensure that any mock routes issued to assist operators in early driver recruitment reflect the areas and schools where operators will be assigned routes.**
- 34. The Toronto Student Transportation Group should ensure that all bus routes can be realistically completed in the time allotted. Dry runs should be completed under expected route and traffic conditions to confirm routes can be completed on schedule.**
- 35. The Toronto Student Transportation Group should develop a comprehensive policy for student transportation requests. The policy should:**
  - Set out a process and firm deadline for submitting requests;**
  - Establish clear responsibilities for the Transportation Group, boards, and parents; and**
  - Provide for exceptional or compassionate circumstances in which late transportation requests will be accommodated.**
- 36. The Toronto Student Transportation Group should take an active role matching open routes with drivers interested in those routes.**
- 37. The Toronto Student Transportation Group should ensure bus operators are contractually obligated to provide information about open routes and unassigned drivers to allow it to facilitate the matching process.**
- 38. The Toronto Student Transportation Group and the Toronto District and Toronto Catholic District school boards should work together to remove barriers that prevent Transportation Group staff from working as a cohesive team.**
- 39. The Toronto Student Transportation Group and the Toronto District and Toronto Catholic District school boards should ensure that Transportation Group staff have access to the same resources and technology.**

- 40. The Toronto Student Transportation Group should ensure that staff employment and reporting responsibilities are independent of the school board that administratively employs them.**
- 41. The Toronto Student Transportation Group should modify its policies and procedures to reflect the revised organizational structure and staff employment responsibilities.**
- 42. The Toronto District and Toronto Catholic District school boards, as well as the Toronto Student Transportation Group, should report back to my Office in six months' time on their progress in implementing my recommendations, and at six-month intervals thereafter until such time as I am satisfied that adequate steps have been taken to address them.**

## Response

- 192** The Toronto District School Board, Toronto Catholic District School Board, and Toronto Student Transportation Group were each provided with an opportunity to review and respond to my preliminary findings, opinion and recommendations. These organizations provided joint comments through the Transportation Group's Governance Committee, which were taken into consideration in the preparation of my report.
- 193** On behalf of the boards and Transportation Group, the Governance Committee accepted all of my 42 recommendations. The committee acknowledged its duty to provide safe and timely bus service to students, as well as its responsibility to communicate effectively about student transportation disruptions. It also accepted its role in failing to communicate adequately with parents during the 2016-2017 service disruptions.
- 194** The Governance Committee outlined several actions it is taking to implement my recommendations. For instance, its new transportation portal was launched in June 2017. The portal allows parents to receive updates on student transportation, as well as specific information about bus delays affecting their children. In future, parents will be able to track the exact location of their children's buses, and at the start of the 2017-2018 school year, a professional call center will be used to assist in responding to high call volumes. Several other steps have been taken to

improve communication between the boards, the Transportation Group, and bus operators, as well as between bus operators and parents. The Transportation Group is also undergoing a structural review. In addition, the Governance Committee will be taking measures to deal with bus operators who fail to meet contractual obligations. A copy of the committee's response is appended to this report.

- 195** I appreciate the co-operation received from all stakeholders in this investigation, and am encouraged by the Governance Committee's positive reply to my report and its commitment to improving student transportation. The Governance Committee has agreed to provide my Office with semi-annual status updates, and we will monitor its progress in implementing my recommendations.



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Paul Dubé  
Ombudsman of Ontario





**Appendix: Response from Governance Committee  
overseeing the Transportation Group**



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Toronto District School Board  
Office of the Associate Director  
5050 Yonge Street, 5<sup>th</sup> Floor  
Toronto, ON M2N 5N8  
Tele: 416-397-3188

30 June 2017

Mr. Paul Dubé  
Ombudsman Ontario  
483 Bay Street, 10<sup>th</sup> Floor  
South Tower  
Toronto, ON M5G 2C9

Dear Mr. Dubé:

On behalf of the Governance Committee overseeing the Toronto Student Transportation Group for the Toronto District School Board and the Toronto Catholic District School Board, we are writing in response to your preliminary report dated May 2017 (Appendix A).

The Governance Committee has reviewed your report in great detail and accepts the recommendations. Staff have already commenced action on a number of improvements as part of our commitment to ensure that future fall start-ups do not experience similar issues. We recognize the responsibility we have to our parents and students for safe and timely service, as well as, ensuring that we have effective communications concerning transportation of students. The September start presented some unique challenges last year that the two school boards did not anticipate, and these issues had significant impact on our students and parents. We accept our role in failing to adequately communicate to parents the service disruption that ensued and have focused our work with operators and the Governance Committee on planning to ensure that the start-up for this coming September is less disruptive and is well communicated. As a Governance Committee, we will have a more active role in the oversight of the consortium.

Some actions that we collectively have already undertaken include:

- A transportation portal was launched in June 2017. Information has been provided to parents in every school and notices were also sent to school office staff. The portal information available to parents will be augmented by a fully integrated “where’s my bus” app in 2018-2019 school year, which will draw GPS data into the app so parents can have instant access to locate their child’s bus on route.
- Regular meetings have occurred between bus operators and both Boards to debrief issues of last year and to plan for operational readiness for the Fall of 2017.
- Additional governance meetings have been held, including two meetings in June 2017 and additional meetings are planned for July and August to update the committee on preparations for the fall start up and discussion of any additional contingencies that maybe required.
- The Governance Committee has directed the operational team to establish weekly conference calls and/or meetings with bus operators throughout the summer and to report back as to operational readiness of the operators, including updates about open routes.
- The Governance Committee has approved the addition of a professional call centre for this year’s bussing start-up in an effort to improve our ability to respond to high call volume from parents.
- The Governance Committee approved a new routing software which will be fully operational for the 2018-2019 school year pending individual Board approval.
- The Governance Committee is undergoing a structural review of the consortium to determine the optimal structure and will put forth recommendations by early 2018.

The Governance Committee takes its role very seriously as the guiding body overseeing Transportation Services on behalf of Toronto District and Toronto Catholic District School Boards. We appreciate the time and care you have taken to provide detailed recommendations for the improvement of services for students and their families in Toronto, and by extension all of Ontario. As you will find in the attached response, we have actioned

many of these recommendations already, and for those we have yet to action we have plans to do so. We hope that all Boards, many of which had similar challenges to the Toronto Boards, benefit from both the recommendations as well our plans to implement initiatives to take action on them.

Sincerely,

Sheila Cary-Meagher  
Co-Chair, TSTG  
Toronto District School Board

Jo-Ann Davis  
Co-Chair, TSTG  
Toronto Catholic District School Board

Carla Kisko  
Associate Director  
Finance and Operations  
Toronto District School Board

Angelo Sangiorgio  
Associate Director  
Planning and Facilities  
Toronto Catholic District School Board

Att.

L13(Ombudsman/Trans/Ltr-TSTGcte Response to Ombudsman Preliminary Transportation Rpt - 20 June 2017)



**TSTG Response to the Ombudsman Preliminary Report  
Recommendations**

1. The Toronto Student Transportation Group should ensure future RFPs allow bus operators to bid for specific routes in clear geographic zones.

**The next RFP will be in 5-7 years (current contract is a 6 year agreement with the possibility of up to two, one year extension. Board agrees that we need to provide closer geographic zones. We are going to work to consolidating programming / rationalizing programs which will lead to more precise zones. We will also aim to complete the RFP further in advance in order to mitigate any complications with its implementation.**

2. The Toronto Student Transportation Group should consider including language in future RFPs prioritizing operators with experience operating in urban areas and with greater resources.

**It is agreed that there should be increased weighting in the RFP for those with Toronto or related urban experience. While this was in the RFP, the increased weighting for scores will help ensure that this is prioritized more.**

3. The Toronto Student Transportation Group's governance committee should meet with its operations committee in early August every year to discuss transportation readiness and address any outstanding issues. Communications staff from both boards should also be present at this meeting.

**It is agreed that governance and operations should meet and will meet. Further, the operations committee will also be doing weekly conference calls with carriers leading up to school start up and updating the governance committee. Governance committee will meet in June and August.**

4. The Toronto Student Transportation Group should develop a communication protocol that specifies how and when parents, school boards, and other stakeholders will be notified of known or suspected service disruptions.

**TSTG will be launching a new Transportation portal in June. Parents will be encouraged to sign up through letters home,**

**TSTG Response to the Ombudsman Preliminary Report  
Recommendations**

system leader's bulletins to Principals and administrators, letters will go home, the website will provide information and post links to the portal and there will be media alerts. The portal will allow those parents who have signed up to receive updates on student transportation as well as specific updates if their child's bus is experiencing any delays. Both Boards are working together on shared messaging and launch. TSTG will also bring forward the protocol for review to governance and this will be shared through the transportation portal, website and through informing the schools to share with all parents.

5. The Toronto Student Transportation Group should review its transportation operation manual to ensure that the responsibilities of all stakeholders are clearly established. The revised manual should delineate clear responsibilities and processes for communicating transportation information. The manual should be made publically available on its website and those of the Toronto District and Toronto Catholic District school boards.

**The operations manual will be reviewed by governance annually. A new Transportation Working Group was recently launched with representatives from both Boards (principals, SO, transportation staff), parent reps, a representative of bus operators and a SEAC representative. At their most recent meeting in May, 2017, the committee reviewed the roles and responsibilities section of the manual. This manual, which is already in place, will continue to be reviewed at every meeting of the Work Group and changes made and brought back to governance. The next meeting of the working group will be in October. The manual is also being updated to reflect any input from the Ombudsman's report. Governance will review the updated manual based on all input in a meeting by the end of 2017 and every year thereafter.**



**TSTG Response to the Ombudsman Preliminary Report  
Recommendations**

6. The Toronto Student Transportation Group should ensure the revised transportation operation manual requires schools impacted by service disruptions to notify it about the nature of the disruption.

**Schools will be encouraged to notify TSTG if they are experiencing delays and how that is impacting them. It will remain the operators' responsibility to notify regarding specific delays to routes and reasons why and update the delay portal in a timely manner. These delays will be fed through the Transportation parent portal so that parents have timely access to any delay information impacting their child. GPS is a new tool that all carriers are mandated to have in place by September 2017 and it can be used to provide specific information on delays.**

7. The Toronto Student Transportation Group should monitor whether operators notify schools and parents about bus delays and take remedial steps against operators who consistently fail to do so.

**TSTG will continue to monitor whether operators are properly notifying schools and parents about bus delays and keep a log and contact the operator to resolve. When there is an obvious pattern, notifications will go to operators requesting improvement and where that does not work, the contract enforcement mechanisms will be utilized. Future RFPs will also include clearer financial penalties specific to this point. In the interim, where any aspect of the contract is not be complied with, there is the opportunity to change or remove routes from operators.**

8. The Toronto Student Transportation Group should ensure its new transportation portal allows bus operators to disclose when a bus is unable to service a route on a particular day.

**TSTG maintains that it is the operators' responsibility to ensure that all students are picked up and delivered to their school and to their home. The new Transportation portal will be a means to connect directly with parents, along with website updates and the existing bus operators' obligations to update parents. Where there is any delay, the portal will be updated**

**TSTG Response to the Ombudsman Preliminary Report  
Recommendations**

**accordingly with a range of time expected for the delay. Where there is a significant delay expected, in addition to the portal being updated, the parents will also receive calls from the operator as per their contractual obligations.**

9. The Toronto Student Transportation Group should expedite its initiative of using bus GPS information and software to automatically post real-time and accurate information about delayed and no-show buses on its website.

**There are some steps that need to happen before the integrated GPS "where's my bus" type application can be utilized along with the Transportation Portal. The first step is a new software. TSTG is now at the proof of concept stage with a vendor and is looking to launch the new system in parallel with the existing system in January, 2018 with a full launch in September 2018. Efforts are being made to expedite the GPS portion for parents in the 2018-2019 school year. Currently, operators can use GPS to see delays and update the delay portal. In the coming school year, TSTG staff will also have access to the GPS portion.**

10. The Toronto Student Transportation Group should ensure that bus operators comply with the service contract's requirement to maintain a sufficient number of phone lines and office staff to address inquiries from the public, schools, and families.

**A meeting was held with representatives of both Boards and the bus operators on June 8, 2017. At that meeting, operators were asked to confirm that they have sufficient phone and office resources to meet the demands of the coming start up. All operators were present in the meeting and all indicated that they now feel fully prepared to meet the demands of start-up. Both Boards will be working with the operators at their regular bus operator meetings to update preparation. Both Boards expect, and will monitor, that it will be staffed sufficiently. If there are breaches, these will be tracked and may impact routes that they serve.**

**TSTG Response to the Ombudsman Preliminary Report  
Recommendations**

11. The Toronto Student Transportation Group should ensure that its call centre is adequately staffed and resourced to handle the volume of complaints and enquiries received each year. The centre's infrastructure and staff complement should be adaptable to unpredictable and changing complaint volumes.

**For the first time, a professional call centre will be used, as approved by governance. The Call Centre will have the capacity to handle call volumes and escalate issues to staff as necessary. Service standards will be agreed upon by both Boards in the contract phase and shared.**

12. The Toronto Student Transportation Group should develop call centre policies and procedures that establish minimum service standards for wait and response times.

**We agree. Will establish service standards with input from other consortia and implement by September 2017, with an aim to be a best practice leader in the service standards and timelines within the province.**

13. The Toronto Student Transportation Group should conduct ongoing trends analyses of complaints and inquiries received in order to address operator service performance issues and identify opportunities for improvements to processes and communication.

**The complaints and inquiries have now been added to existing KPI's that are currently collected. These will be included for information at every governance committee information package. Where trends exist, the contract provisions regarding non-performance will be discussed and implemented.**

14. The Toronto Student Transportation Group, in combination with the Toronto District and Toronto Catholic District school boards, should proactively ensure that parents know how to access bus service information and complaint procedures prior to the start of each school year.

**Currently send out communication packages to all schools. Will augment this by provided letter in knapsacks and will be sent to parents who sign up on new transportation portal, as**



**TSTG Response to the Ombudsman Preliminary Report  
Recommendations**

**well as on the website. Included in the information will be a complaint procedure, along with a revised communication package with input from both Boards.**

15. The Toronto Student Transportation Group, in combination with bus operators and the Toronto District and Toronto Catholic District school boards, should create a school bus transportation complaint procedure, The procedure should:

- create a centralized mechanism for recording and responding to complaints;
- include provisions for escalating serious or unresolved complaints; and
- distinguish between requests for information about bus schedules and routes, and complaints about bus service.

**School bus transportation procedure will be updated to fully implement these recommendations. TSTG currently maintains an issue tracking application and will add additional functionality to comply with the recommendation. A formal complaint procedure will be developed and brought back to governance and the transportation portal, website and letters to families will also provide access to this information.**

16. The Toronto Student Transportation Group should ensure parents and other stakeholders are provided with information about how to access the complaint procedure each year.

**As per above (14 and 15) this will be implemented and distributed accordingly.**

17. The Toronto Student Transportation Group should establish clear steps for evaluating the adequacy of the bus operator's investigation, incident report, and response to safety incidents.

**The TSTG currently employs a Transportation Safety Officer who is already tasked with the oversight of safety measures. Will look to clarify and ensure these items are included as part of our normal accident review process.**

**TSTG Response to the Ombudsman Preliminary Report  
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18. The Toronto Student Transportation Group should follow up with and take remedial steps against operators who fail to adequately investigate, report, and respond to safety incidents.

**We will ensure bus operators are required to follow requirements. We will monitor failure to adequately investigate, report, and respond to safety incidents, and ensure they are penalized in accordance with contract, such as serving notice for loss of routes.**

19. The Toronto Student Transportation Group should document its process for identifying and responding to safety incidents in its policies and procedures.

**These procedures exist and have been updated November, 2016 and have been added to the operations manual in May, 2017 and will be shared with governance.**

20. The Toronto Student Transportation Group should ensure future service contracts require that bus operators provide drivers with both initial and ongoing annual training about the procedures and importance of the “Purple Equals Parent” program and the requirement to provide door-to-door transportation for students with special needs.

**This is in the current contract and part of annual training and we will work with the operators to ensure that this is even more robust. We will also be asking operators to put notifications in buses (if this is not acceptable, then in their manuals) reminding re: purple equals parent.**

21. The Toronto Student Transportation Group should carefully consider enforcing contractual penalties against operators with bus drivers that consistently or egregiously fail to adhere to the “Purple Equals Parent” program requirement.

**Carriers are required to comply. We investigate any issue where this transpires and where determined problem is driver’s responsibility we will be seeking remediation based on**

**TSTG Response to the Ombudsman Preliminary Report  
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**level of culpability, will enforce penalties including loss of routes or removal of driver from route or company.**

22. The Toronto Student Transportation Group should consider adding provisions to future service contracts allowing it to penalize operators that contravene the transportation policy for students with special needs, such as the requirement for door-to-door transportation.

**This will be added to next contract based on legal and procurement input and we will also use existing levers of contract to implement to operators.**

23. The Toronto Student Transportation Group should ensure that bus operators who subcontract work to taxi companies comply with the service contract's requirements, including that they provide instruction and training to taxi drivers before they begin picking up students.

**TSTG requires operators to confirm that they are aware of the conditions placed upon them contractually when subcontracting. Part of that is to only use vendors of record, who are screened through the vendor recruitment process. TSTG will also provide training materials to vendors to share with their drivers and have taxi operators sign off that they will implement this.**

24. When deciding whether to approve an operator's request to subcontract work to a taxi, the Toronto Student Transportation Group should ensure that the taxi is being used as a last resort and that the same taxi driver will service the route whenever possible.

**This is consistent with current expectations though TSTG will also send a letter reinforcing this expectation and will also include more robust language in future RFPs that it is our expectation that taxis are used as a last resort.**



**TSTG Response to the Ombudsman Preliminary Report  
Recommendations**

25. The Toronto Student Transportation Group, the Toronto District, and the Toronto Catholic District school boards should ensure that parents and schools are provided adequate and reasonable notice before they modify students' pickup or drop-off times.

**Current standard turnaround time is 72 hours from the time application is received until it is put on the road. This is marginally longer in Sept when set dates are used to minimize disruption to routes. The consortium informs schools/operators and they inform parents. Parents are informed by the end of school day prior to the service starting. Efforts will be made to provide greater notice where possible.**

26. The Toronto District and Toronto Catholic District school boards should proactively develop and implement contingency staffing plans to ensure adequate student supervision if and when transportation disruptions occur. The plans should include clear protocols regarding emergency staff assignments to supervise students stranded as a result of service disruptions.

**Board contingency program was developed in September 2016 and will continue for every school start up and all principals will be notified prior to school start up each year. The program provides lists of staff who are available for short term relief where additional supervision is required and notices go out to schools as to how to get reimbursed for these additional costs. In the 2016 start-up, these additional costs were approximately \$50,000 in additional staffing.**

27. The Toronto Student Transportation Group should draft terms of reference to guide the advisory group's work.

**This has been completed at May 2017 Transportation Work Group.**

28. The Toronto Student Transportation Group should post minutes of the advisory group's meetings on its website.

**Once approved by the committee, they will be posted on the TSTG website and website of both Boards.**



**TSTG Response to the Ombudsman Preliminary Report  
Recommendations**

29. To minimize the possibility for future transportation disruptions, the Toronto District and Toronto Catholic District school boards should consult with management from the Toronto Student Transportation Group before making decisions affecting student transportation.

**Consultation to take place with TSTG and then GM to meet with governance to discuss how these changes will impact on operations. Governance committee will discuss creating program change deadlines for significant program changes.**

30. The Toronto District and Toronto Catholic District school boards should provide student transportation information to the Toronto Student Transportation Group as early as possible to enable an earlier start to the route planning process.

**Both boards have implemented new timelines for data verification forms and routes will be issued to companies 3 weeks earlier than past years. Operators indicated that this will be a significant improvement for them at the June 8, 2017 operator meeting.**

31. The Toronto Student Transportation Group's governance committee should provide prior approval for any requested route optimizations occurring outside the typical route planning process.

**Any significant changes to optimization implementation will be approved by governance.**

32. The Toronto Student Transportation Group's governance committee should consult with Transportation Group and school board management regarding the impact of requested route optimizations before granting approval for the optimization.

**Agreed.**

33. The Toronto Student Transportation Group should ensure that any mock routes issued to assist operators in early driver recruitment reflect the areas and schools where operators will be assigned routes.

**TSTG Response to the Ombudsman Preliminary Report  
Recommendations**

**Measures have been taken to provide final routes earlier and therefore will not need to provide mock routes. Mock routes were done due to the new RFP and this will not be an annual process and will review and improve for next RFP process to narrow down geographical zones to provide greater focus on the area in any future RFP.**

34. The Toronto Student Transportation Group should ensure that all bus routes can be realistically completed in the time allotted. Dry runs should be completed under expected route and traffic conditions to confirm routes can be completed on schedule.

**We agree. Requirement is to do dry runs. Going forward we will follow up in a more timely manner prior to school start up to ensure dry runs have been completed and report back to governance that this has been done and that operators are in compliance.**

35. The Toronto Student Transportation Group should develop a comprehensive policy for student transportation requests. The policy should:

- Set out a process and firm deadline for submitting requests;
- Establish clear responsibilities for the Transportation Group, boards, and parents; and
- Provide for exceptional or compassionate circumstances in which late transportation requests will be accommodated.

**Governance committee will set out guidelines for when and how requests will be approved and that will also outline the responsibilities for all parties. The Boards will make the final approval of their own policies and will incorporate the requisite accommodation requirements as per best practice and case law.**

36. The Toronto Student Transportation Group should take an active role matching open routes with drivers interested in those routes.

**At the weekly operator conference calls in the summer, TSTG will be actively determining if any operator is having a**

**TSTG Response to the Ombudsman Preliminary Report  
Recommendations**

**challenge meeting their obligations and where bus operators are having any difficulty, TSTG will work with operators to match. Board, through TSTG has also worked closely with the operators to provide job fair venues for recruitment over the summer through the Employment Ontario network of employment assisted services.**

37. The Toronto Student Transportation Group should ensure bus operators are contractually obligated to provide information about open routes and unassigned drivers to allow it to facilitate the matching process.

**Operators provide weekly updates and they will report on in house staff, training program, drivers and spares and any uncovered routes**

38. The Toronto Student Transportation Group and the Toronto District and Toronto Catholic District school boards should work together to remove barriers that prevent Transportation Group staff from working as a cohesive team.

**Governance committee is reviewing organizational models that will best work for the team and also working closely on teambuilding and engaging the team.**

39. The Toronto Student Transportation Group and the Toronto District and Toronto Catholic District school boards should ensure that Transportation Group staff have access to the same resources and technology.

**A new call centre is being implemented. A new software is in the process of being selected and governance will ask in each annual plan for a list of any needed resources in order to fulfill its mandate. The TSTG has sent a letter to the Ministry requesting financial support for the software**



**TSTG Response to the Ombudsman Preliminary Report  
Recommendations**

40. The Toronto Student Transportation Group should ensure that staff employment and reporting responsibilities are independent of the school board that administratively employs them.


**Governance committee is reviewing organizational models to ensure a better structure to meet the needs of the service that is offered.**

41. The Toronto Student Transportation Group should modify its policies and procedures to reflect the revised organizational structure and staff employment responsibilities.

**Governance committee is reviewing organizational models.**

42. The Toronto District and Toronto Catholic District school boards, as well as the Toronto Student Transportation Group, should report back to my Office in six months' time on their progress in implementing my recommendations, and at six-month intervals thereafter until such time as I am satisfied that adequate steps have been taken to address them.

**Agree.**



THE  
**ROUTE**  
OF THE  
**PROBLEM**



ONTARIO'S WATCHDOG

Office of the Ombudsman of Ontario  
Bell Trinity Square  
483 Bay Street, 10<sup>th</sup> Floor, South Tower  
Toronto, Ontario  
M5G 2C9

[www.ombudsman.on.ca](http://www.ombudsman.on.ca)  
1-800-263-1830

Facebook:  
Ontario Ombudsman

Twitter:  
@Ont\_Ombudsman  
@Ont\_OmbudsmanFR



# Ministry of Education Effectiveness & Efficiency Review

## Toronto Transportation Group

E&E Phase 4 Review

December 2011

Final Report



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

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

## Executive Summary

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

The review of the Toronto Transportation Group was conducted in two parts. Policies and Practices, Routing and Technology and Contracts were reviewed in December 2010 and Consortium Management in November 2011. A Membership Agreement was signed by the two school Boards to officially create the Consortium. When the Consortium was officially formed in September 2011, the name was changed from Toronto Transportation Group (TTG) to Toronto Student Transportation Group (TSTG). For consistency, this report uses TTG throughout.

The School Boards’ transportation departments have integrated some aspects of their operations and big steps have been taken in the formal creation of the Consortium. At the time of the Consortium Management review however, the Consortium was just a little under two months old with little evidence for the Review Team to assess. The School Boards should continue the transition, integrating the School Boards’ respective transportation departments into a single, coordinated unit.

While the TTG’s Policies and Practices are comprehensively documented and adhered to, each School Board independently maintains its own policy and operating procedures for transportation services. It is strongly recommended that the TTG focus on harmonizing these policies and practices. The absence of policy harmonization is exacerbated by very significant differences in, and the relative complexity of, the policies for the two School Boards. While the TTG’s documentation tries to highlight these differences, the manner in which this is done adds to the documentation’s complexity and increases policy duplication.

The review of the TTG’s Routing and Technology found that most of the systems and processes in place do a good job of managing the development and maintenance of effective and efficient bus routes and schedules. The TTG’s operating practices have evolved to address the School Boards’ unique operating environment, and achieve a reasonable level of efficiency while delivering an exceptional level of service quality. However, by increasing the level of cooperation between the School Boards and enhancing the integration of operations, there is room for further improvements to both processes and results. .

The transportation operations have complete, standardized contracts with all transportation operators and have been using competitive procurement for close to two decades. They should be commended for their environmental leadership, as demonstrated by operator requirements prescribing adherence to certain environmentally-friendly practices. There is also an effective and efficient program to monitor operator contract compliance and operator performance. Some areas of improvement include ensuring that all drivers receive safety training in a timely manner and that random route audits are conducted regularly.

As a result of this review of current performance, the Consortium has been rated **Moderate**. Based on this evaluation, the Ministry will provide transportation funding to narrow the 2010-2011 transportation funding gap for the TDSB and the TDCSB as determined by the formula in Table 1. The detailed calculations of disbursements are outlined in section seven of this report and summarized below.

Toronto District School Board	\$0
Toronto Catholic District School Board	\$1,596,051

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

# 1 Introduction

## 1.1 Background

### 1.1.1 Funding for student transportation in Ontario

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

In 1998-1999, a new education funding model was introduced in the Province of Ontario outlining a comprehensive approach to funding School Boards. However, a decision was made to hold funding for student transportation steady, on an interim basis, while the Ministry worked to develop and implement a new approach. From 1998-1999 to 2010-2011, an increase of over \$267 million in funding has been provided to address increasing costs for student transportation, such as fuel price increases, despite a general decline in student enrolment.

### 1.1.2 Transportation reform

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

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

### 1.1.3 The formation of school transportation consortia

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

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

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

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

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

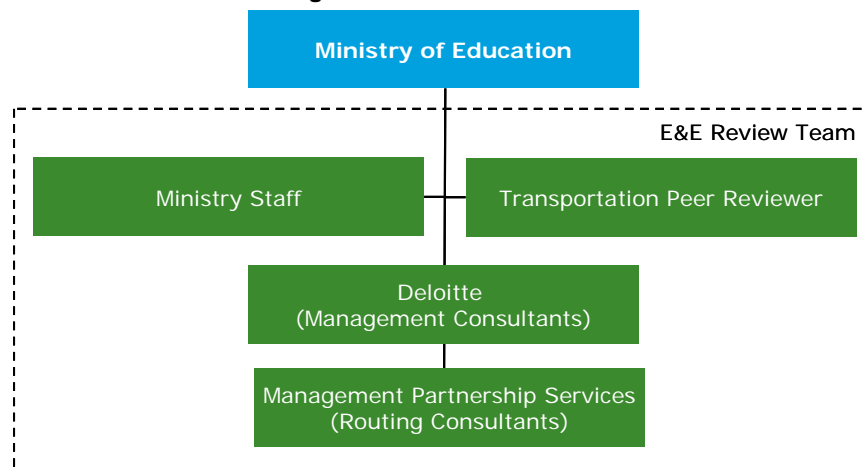
### 1.1.4 Effectiveness and Efficiency Review

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

### 1.1.5 The E&E Review Team

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

Figure 1: E&E Review Team



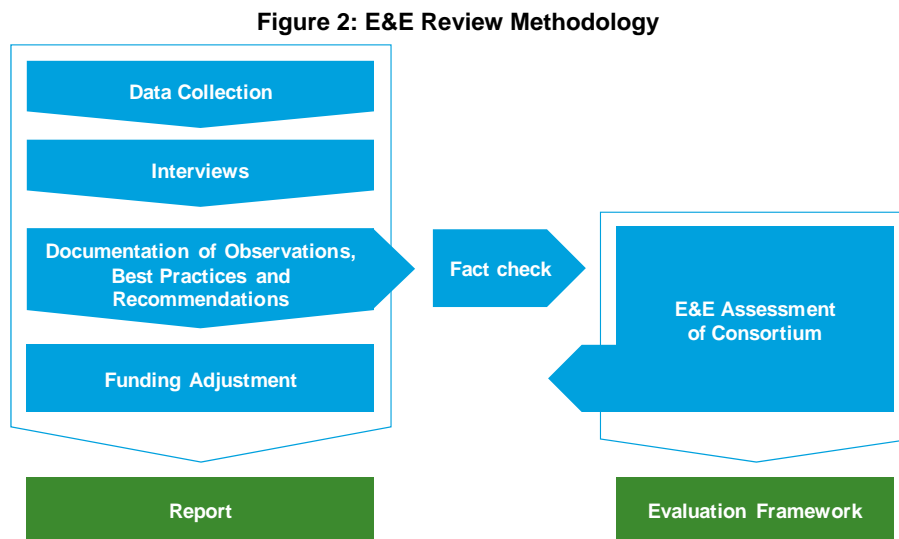
## 1.2 Scope of Deloitte Engagement

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

- Lead the planning and execution of E&E Reviews for each of the 18 transportation consortia to be reviewed in Phases Three and Four (currently in phase 4);
- At the beginning of each E&E Review, convene and moderate E&E Review Team planning meetings to determine data required and availability prior to the review;
- Review consortium arrangement, governance structures and contracting procedures;
- Incorporate the results of the routing and technology and policies and practices reviews completed by MPS into the final report; and
- Prepare a report for each consortium that has been subject to an E&E Review in Phases three and four. The target audience for the report will be the Ministry, the consortium, and its Member School Boards. Once finalized, each report will be released to the consortium and its Member School Boards.

### 1.3 Methodology Used to Complete E&E Review

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



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

#### 1.3.1 Step 1 – Data collection

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

Data is collected in four main areas:

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

#### 1.3.2 Step 2 – Interviews

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

#### 1.3.3 Step 3 – Documentation of Observations, Best Practices and Recommendations

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

- Observations that involve fact based findings of the review, including current practices and policies;
- Best Practices used by the consortium under each area; and



- Recommendations for improvements based on the Assessment Guide. Figure 3 below provides a summary of the key criteria used in the Assessment Guide to determine the effectiveness and efficiency of each consortium.

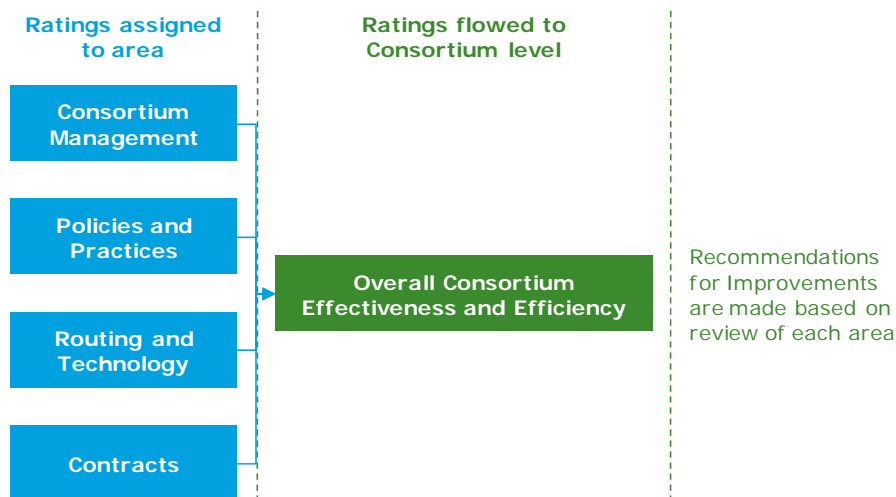
**Figure 3: Criteria for an Effective and Efficient consortium**

Consortium management	Policies and Practices	Routing and Technology	Contracts
<ul style="list-style-type: none"> <li>• Distinct entity focused on providing student transportation services for member boards</li> <li>• Well defined governance and organizational structure with clear roles and responsibilities</li> <li>• 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</li> <li>• Management has communicated clear goals and objectives of the Consortium and these are reflected in the operational plan</li> <li>• The Consortium takes a comprehensive approach to managing human resources</li> <li>• Well established accountability framework reflected in the set up and operation of the Consortium including documentation of terms in a Consortium Agreement</li> <li>• Operations are regularly monitored and performance continually improved</li> <li>• Financial processes ensure accountability and transparency to member boards</li> <li>• A budgeting process is in place ensuring timely preparation and monitoring of expenses</li> <li>• All of the Consortium's key business relationships are defined and documented in contracts</li> <li>• Governance committee focuses only on high level decisions</li> <li>• Organizational structure is efficient and utilizes staff appropriately</li> <li>• Streamlined financial and business processes</li> <li>• Cost sharing mechanism is well defined and implemented</li> <li>• 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</li> </ul>	<ul style="list-style-type: none"> <li>• Safety programs are established for all students using age appropriate training tools</li> <li>• Development of policies is based on well defined parameters dictated by the strategic goals of the governance structure and Consortium Management operating plans</li> <li>• A mechanism is defined to allow for regular review and consideration of policy and practice changes to address environmental changes</li> <li>• 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</li> <li>• Regular monitoring and evaluation of policy expectations is conducted to ensure their continued relevancy and service impacts</li> <li>• Enforcement procedures are well defined and regularly executed with timely follow-up</li> <li>• Harmonized transportation policies incorporate safety, operational and cost considerations</li> <li>• Position-appropriate delegation of decisions to ensure the efficiency of decision making</li> <li>• Operational alternatives to traditional practices are considered and implemented where reasonable and appropriate</li> <li>• Service levels are well defined, considerate of local conditions, and understood by all participating stakeholders</li> <li>• Policy and practice modifications for students with special needs are considered in terms of both the exceptionality and its service and cost impacts</li> </ul>	<ul style="list-style-type: none"> <li>• Transportation management software has been implemented and integrated into the operational environment</li> <li>• Key underlying data sets (e.g., student and map data) are regularly updated:</li> <li>• Responsibility and accountability for the updates is clearly defined and performance is regularly reviewed</li> <li>• Coding structures are established to facilitate scenario modeling and operational analysis of designated subgroups of students, runs, schools, etc.</li> <li>• Procedures are in place to use software functionality to regularly evaluate operational performance and model alternatives to traditional practices</li> <li>• Disaster recovery plans and back up procedures are established, performed regularly, and tested</li> <li>• Operational performance is regularly monitored through KPI and reporting tools are used to distribute results to appropriate parties</li> <li>• Technology tools are used to reduce or eliminate manual production and distribution activities where possible in order to increase productivity</li> <li>• Training programs are established in order to increase proficiency with existing tools</li> <li>• Route planning activities utilize system functionality within the defined plan established by Consortium management</li> </ul>	<ul style="list-style-type: none"> <li>• Contracts exist for all service providers, including taxi, boat and/or municipal transit services and parent drivers</li> <li>• Contracts are structured to ensure accountability and transparency between contracted parties</li> <li>• All operator contracts are complete with respect to recommended clauses</li> <li>• Compensation formulae are clear</li> <li>• Operator contracts are in place prior to the start of the school year</li> <li>• Procurement processes are conducted in line with the Consortium's procurement policies and procurement calendar</li> <li>• The Consortium has laid the groundwork for, or is actively using, competitive procurement processes</li> <li>• Proactive efforts are made to ensure operator contract compliance and legal compliance</li> <li>• The Consortium collects and verifies information required from operators in contracts</li> <li>• The Consortium actively monitors and follows up on operator on-the-road performance using random, documented route audits or their equivalent</li> <li>• The Consortium avoids using School Board owned vehicles</li> </ul>

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

The Assessment Guide was developed to enable the E&E Review Team to provide each consortium that undergoes an E&E Review with a consistent, fair, and transparent method of assessment. The Assessment Guide is broken down along the four main components of review (i.e., Consortium Management, Policies and Practices, Routing and Technology, and Contracts) and, for each, illustrates what constitutes a specific level of effectiveness and efficiency (refer to Figure 4 for diagram of process).

**Figure 4: Assessment of consortia - Ratings Analysis and Assignment**



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

**1.3.5 Funding adjustment**

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

**Table 1: Funding Adjustment Formula**

Overall Rating	Effect on deficit Boards <sup>1</sup>	Effect on surplus Boards <sup>1</sup>
High	Reduce the gap by 100% (i.e. eliminate the gap)	No in-year funding impact; out-year changes are to be determined
Moderate-High	Reduce the gap by 90%	Same as above
Moderate	Reduce the gap by 60%	Same as above
Moderate-Low	Reduce the gap by 0%	Same as above
Low	Reduce the gap by 0%	Same as above

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

**1.3.6 Purpose of report**

This Report serves as the deliverable for the E&E Review conducted on the Consortium by the E&E Review Team during the week of December 13, 2010. The Consortium management section is based on the review conducted during the week of November 1, 2011.

**1.3.7 Materials relied upon**

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

**1.3.8 Limitations on the use of this report**

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

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

## 2 Consortium Overview

### 2.1 Consortium Overview

A Membership Agreement was formally signed to create the Consortium, Toronto Student Transportation Group, on the 21<sup>st</sup> of September, 2011, and the Consortium is in the early stages of its implementation. The Consortium was formed from the transportation departments of the Toronto District School Board and the Toronto Catholic District School Board, which until recently were responsible for the management and facilitation of the student transportation services for their respective Boards.

The two transportation departments provide transportation services to approximately 45,000 students across about 800 schools and centres. These transportation services are provided by six different operators, who use over 1,500 vehicles to service more than 1,700 routes and 10,000 runs.

The service area covered encompasses the entire City of Toronto and is all urban; the two transportation departments also serve the largest number of special needs students in the Province of Ontario, and provide over 8,000 special needs students with transportation services.

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

**Table 2: 2009-10 Transportation Survey Data<sup>2</sup>**

	TCDSB	TDSB	Total
<b>Number of schools served</b>	<b>208</b>	<b>574</b>	<b>782</b>
<b>Total general transported students</b>	10,101	2,462	12,563
Total special needs <sup>3</sup> transported students	1,653	4,864	6,517
Total wheelchair accessible transportation	117	522	639
Total specialized program <sup>4</sup> transportation	867	4,993	5,860
Total courtesy riders	1,336	120	1,456
Total hazard riders	12,898	4,073	16,971
<b>Total students transported daily</b>	<b>26,972</b>	<b>17,034</b>	<b>44,006</b>
Total public transit riders	1,210	3,858	5,068
<b>Total students transported including transit riders</b>	<b>28,182</b>	<b>20,892</b>	<b>49,074</b>
Total contracted full and mid-sized buses <sup>5</sup>	363	163	526
Total contracted mini buses	318	738	1,056
Total contracted school purpose vehicles <sup>6</sup>	8	94	102
Total contracted PDPV	32	105	137
Total contracted taxis	1	0	1
<b>Total number of contracted vehicles</b>	<b>722</b>	<b>1,100</b>	<b>1,822</b>

**Table 3: 2009-2010 Financial Data**

	TCDSB	TDSB
Allocation	\$20,914,149	\$48,243,771
Net expenditures	\$23,574,234	\$47,431,855
Transportation surplus (deficit)	\$(2,660,085)	\$811,916

<sup>2</sup> Data reported in this section of the report may be inconsistent with data presented in other sections due to the different timing of data collection. Data reported in this section of the report includes noon-hour transportation.

<sup>3</sup> Includes students requiring special transportation such as congregated and integrated special education students who require dedicated routes and/or vehicles; students who must ride alone; students who require an attendant on the vehicle

<sup>4</sup> Includes students transported to French Immersion, magnet and gifted programs, students with special needs who are transported to specialized programs are captured as special needs transported students.

<sup>5</sup> Includes full-sized buses, mid-sized buses, full-sized buses adapted for wheelchair use and mid-sized buses adapted for wheelchair use; all vehicle counts are rounded to the nearest whole number.

<sup>6</sup> Includes school-purposed vans, mini-vans, and sedans.

## 3 Consortium Management

### 3.1 Introduction

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

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

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

Consortium Management – E&E Rating:	Low
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### 3.2 Overview

Until recently the transportation departments of the Toronto District School Board and the Toronto Catholic District School Board were responsible for managing and facilitating student transportation services for their respective Boards. The Membership Agreement to formally create the Consortium was signed on the 21<sup>st</sup> of September, 2011, and is presently in the early stages of its implementation.

Prior to the formal creation of the Consortium, the two transportation departments cooperated in the provision of student transportation services in a number of ways, such as joint route planning and operator services procurement. Both departments reside in the same location. The recently formed and formally integrated Consortium will help both Boards realize efficiencies by reducing the duplication of effort that existed under the two transportation department regimes, specifically within the management of operations and in policies and practices.

### 3.3 Governance

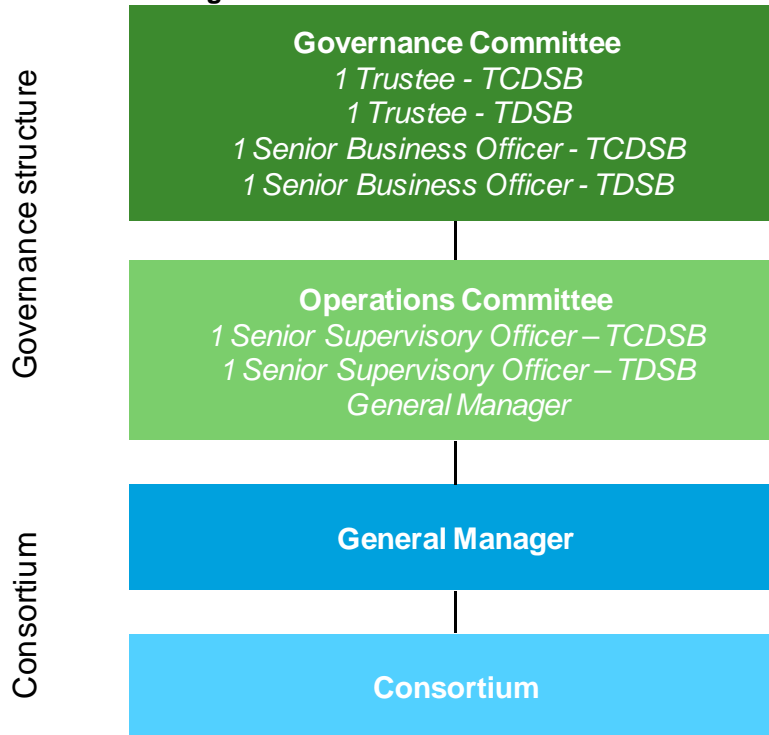
Governance refers to the way in which an organization is directed and controlled. Establishing administrative structures and processes that facilitate, monitor, measure and improve effective business management are primary responsibilities of a governance structure. Three key principles for an effective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

#### 3.3.1 Observations

##### 3.3.1.1 Governance structure

The Consortium governance structure for the TTG, as documented, is outlined in the Membership Agreement and is illustrated below:

**Figure 5: Consortium Governance Structure**



The Membership Agreement outlines the roles and responsibilities of the Governance Committee and the Operations Committee. The Governance Committee’s purpose is to provide direction, oversight and advice to the Consortium. Its primary responsibilities are to:

- Review the Governance Committee’s annual agenda of activities, mandate and terms of reference;
- Review and report to the Member Boards any proposed policy changes;
- Develop, in conjunction with the Operations Committee, a method for selecting the General Manager;
- Undertake an annual performance review of the General Manager;
- Review policies and procedures to ensure consistency with the Consortium’s goals and priorities;
- Mediate and resolve any unresolved issues brought forward by the Operations Committee; and
- Approve and publish an annual report on the Consortium’s performance and accomplishments.

The Operations Committee’s purpose is to provide day to day operation of the Consortium through the actions of the General Manager. Its primary responsibilities are to:

- Make recommendations concerning the Consortium’s financial planning, annual budgeting, and financial reporting;
- Deal with operator-related contract issues, including negotiations and dispute resolution;
- Identify and advise on policy and regulation matters;
- Deal with transportation issues including service levels and parent requests for exceptions to policies;
- Communicate and correspond with the various Provincial Ministries regarding policy direction and regulations; and
- Deal with staffing and safety issues from the employee unit.

The Governance Committee will be required to meet at least once every three months, and minutes will be taken, circulated to the Member Boards and posted for public review. The Chair of the Governance



Committee will be elected through consensus and will rotate yearly between the two Trustee members. The Operations Committee will be required to meet at least once every two months during the course of the school year, and minutes will be taken, circulated to the Member Boards and posted for public review.

Only one or two meetings have taken place for each Committee and meeting minutes were taken and documented. The Committees presently meet more frequently than planned as the Consortium is in the early stages of development.

Some discrepancies were noted during the interview between practice and documentation i.e the Transportation Operations Manager and Transportation Planning and Technology Officer participate as members in the Operations Committee.

The Governance Committee nominees report to the Board of Trustees at each Board, while the Operations Committee reports to the administration of the Board i.e. the Director of Education.

### **3.3.1.2 Board level governance and arbitration clause**

The Membership Agreement includes a dispute resolution clause that states that disputes will first be referred to the General Manager for amicable resolution and then to the Senior Administrators responsible for transportation on the Operations Committee, and then to the School Boards' Directors of Education. If the dispute cannot be resolved, it will then be referred to a mediator jointly selected by the School Boards, and then to a single arbitrator selected by the Member Boards – all decisions of the arbitrator shall be final and binding.

### **3.3.1.3 Member Board Involvement**

The Member Boards continue to maintain involvement in student transportation operations as follows:

- Both Boards are responsible for managing parent requests for exceptions to policies. The management of exceptions is handled administratively but when the parent does not agree with the decision, the appeal body is part of the Board.
- Each Board still has responsibility for setting Transportation Policy.
- Each Board still has a (partial) resource responsible for transportation matters that represents the Board on the Operations Committee as well as a (partial) resource that represents the Board on the Governance Committee.

## **3.3.2 Best Practices**

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

### **3.3.2.1 Structure of the governance structures**

The Consortium's governance structures have equal representation from each Member Board in terms of membership. Equal representation promotes fairness and equal participation in decision making and ensures the rights of each Board are considered equally.

### **3.3.2.2 Relationship with the Governance Committee**

The Governance Committee works closely with the General Manager while at the same time respecting a clear delineation between the day to day management of the Consortium and high level policy and strategic matters that are handled at the Board level. The positive working relationship between the two Member Boards and the Consortium allows for open communication amongst all parties.

### **3.3.2.3 Meetings of the governance structures**

The Consortium's governance structures are required to meet a minimum number of times per year and utilize formal agendas, and meeting minutes are taken, ratified and signed. This ensures that the Consortium is open, accountable and transparent to its stakeholders.

### **3.3.2.4 Dispute resolution**

A Member Board level dispute policy is in place between the Member Boards. The policy is an effective mechanism to protect the rights of Member Boards and will also help to ensure that decisions made represent the best interests of parties involved. To date, the Member Boards have resolved all questions and issues without having to use this dispute mechanism policy.

### 3.3.3 Recommendations

#### 3.3.3.1 Paperwork should be updated to reflect the actual practice for the Consortium

As the Consortium continues to evolve and practices are implemented, an effort should be made to ensure practices are implemented in compliance with policy, however, where necessary, policy and paperwork should be updated to reflect the practical lessons learned through implementation.

#### 3.3.3.2 Delegation of authority to the Governance Committee

It is interesting and unique that the dispute resolution clause in the Membership Agreement and the parent requests for policy exemptions do not escalate to the Governance Committee but instead revert back to the Boards for resolution. For the Governance Committee to play a meaningful role in the oversight of the Consortium it needs to have an appropriate delegation of authority from Member Boards. We encourage the Boards and the Consortium to further define (given the newness of the Consortium) their role and delegated authority and ensure they have the “power” to provide appropriate and meaningful oversight and reduce the administrative burden of the Member Boards.

#### 3.3.3.3 There should be a separation of the Operations Committee oversight from day to day operations

The implementation of the Membership Agreement as it pertains to the actual roles and responsibilities being undertaken by the Consortium, Operations and Governance Committee are still a work in progress. As such, it is difficult to comment on the role being executed by the Operations Committee. The Membership Agreement, however states that the Operations Committee is to provide day to day operation of the Consortium through the actions of the General Manager. There needs to be a clear separation of operations from governance in actual execution of roles and responsibilities as well as in the policies and procedures and we recommend documentation be updated to clarify the role of the operations committee as reviewing issues escalated by the manager and recommending potential resolutions.

#### 3.3.3.4 Streamlined communication

Both the Governance and the Operations Committee have responsibility for communication back to the Boards – the Governance Committee to the Board of Trustees and the Operations Committee to the Board’s administrations. To ensure consistent messaging and streamlined reporting, the Consortium is encouraged to consider that reporting should be funnelled through the Governance Committee that has members from the Board of Trustees as well as the Board administration.

## 3.4 Organizational structure

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

### 3.4.1 Observations

#### 3.4.1.1 Membership Agreement

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

- The Consortium’s objective: to manage and administer all home to school transportation (including late buses), school to school transportation, and special needs transportation in line with the School Boards’ policies and procedures;
- The Consortium’s governance structure: the Governance Committee’s composition, roles and responsibilities, and the Operations Committee’s composition, roles and responsibilities;
- The Consortium’s management structure: The management structure consists of the General Manager, Operations Manager and Technology & Planning Manager. The management structure is responsible for day to day operations and is supported by current staff (who shall remain employed by their respective School Boards) – new staff positions will be paid for by the School Board that requires that position;

- The Consortium's ability to execute contracts: the General Manager will be given the authority to enter into transportation-related contracts on behalf of the School Boards;
- The Consortium's administration of finances, operations, and cost-sharing;
- The Consortium's procurement policies;
- The Consortium's adherence to School Board policies and procedures and how changes in policies and procedures will be evaluated and addressed and how resultant costs / savings will be allocated;
- The term of the Membership Agreement, which was to be effective from December 1, 2010 to August 31, 2011, with renewal on an annual basis – termination will require notice of at least 180 days; and
- Other items related to: insurance, amalgamation, dispute resolution, termination, indemnification, and confidentiality provisions.

**3.4.1.2 Separate Legal Entity**

The Consortium is not a separate legal entity.

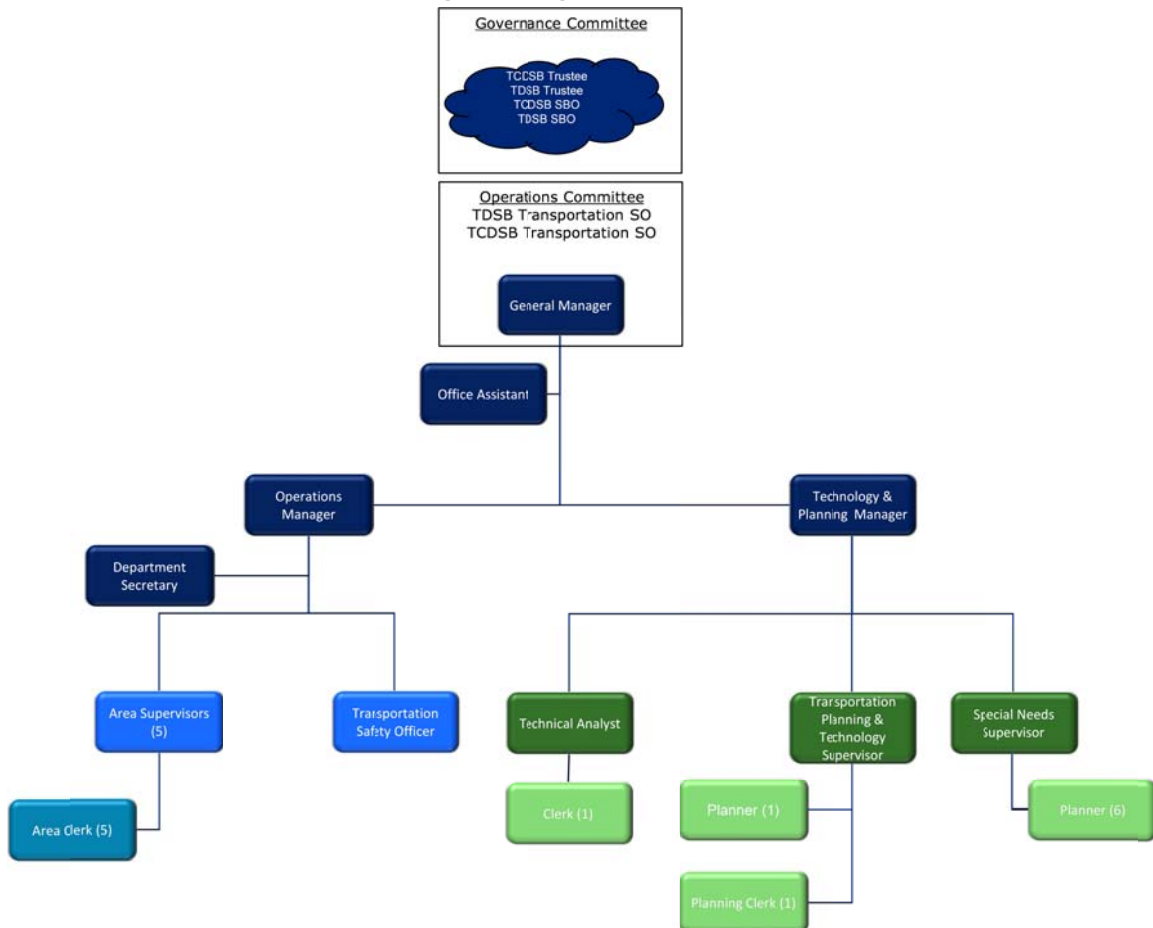
**3.4.1.3 Secondment Agreement**

There are no secondment agreements signed between Consortium staff and the School Boards.

**3.4.1.4 Organization of entity**

The Membership Agreement outlines the Consortium's organizational structure, as illustrated below:

**Figure 6: Organization Chart**



While not shown in the structure outlined above, each staff member is still directly reporting to someone from their own Board.

Job descriptions that outline each position's specific responsibilities, decision-making authorities, required qualifications, skills, and reporting / delegation authority are available.

Under this organizational structure, staff are employed by their respective School Boards and would be members of their respective School Boards' collective bargaining units. As a result of the collective bargaining process, employees can be moved in and out of their roles within the Consortium.

### **3.4.2 Best Practices**

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

#### **3.4.2.1 Membership Agreement Clauses**

The Membership Agreement, which acts as the legal document governing the Consortium, contains sufficient detail on key provisions such as cost sharing, dispute resolutions, oversight, and the role of the Consortium. This is important in that it clearly defines the relationship between the Member Boards in the delivery of safe, effective and efficient student transportation services.

#### **3.4.2.2 Job descriptions**

Clear and detailed job descriptions are defined for all positions within the Consortium. The availability of job descriptions helps to ensure that staff can efficiently execute on their daily duties and helps to ensure a smooth transition in the event of staff turnover. We encourage the Consortium to continue reviewing and updating job descriptions on a regular basis. Job descriptions should be updated with reporting responsibilities.

### **3.4.3 Recommendations**

#### **3.4.3.1 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 Member Board level (i.e., changes in trustees, Board members, etc.); and also provides contractual benefits to the Consortium. As a separate legal entity, the Consortium can enter into binding legal contracts, for all services purchased, most importantly with bus operators, and as such is limiting liability to the Consortium and in turn, limiting liability to Member Boards.

#### **3.4.3.2 Organization of Entity**

Notwithstanding the requirement that those in "collective bargaining" positions report to a supervisor from their respective School Boards, the Consortium's organizational structure reflects clear lines of reporting between staff and Consortium management. This structure can help to increase effectiveness by creating an appropriate system by which issues can be escalated to Consortium management. The requirement however, that staff report to a supervisor from their respective school board creates a conflicting organization structure that has the potential to be confusing to staff in the execution of their positions, especially if contradictory information or requests are presented. We encourage the Consortium to work with the Boards and collective bargaining units to develop a functionally appropriate reporting structure, irrespective of Board affiliation.

#### **3.4.3.3 Sign secondment agreements with the School Boards**

Under this organizational structure, staff are expected to remain employed by their respective School Boards and would be members of their respective School Boards' collective bargaining unit. It is recommended that the Consortium sign appropriate secondment agreements with the Boards in order to document the relationship and in order to provide additional clarity with respect to the terms under which staff would be seconded to the Consortium. This is especially true for the General Manager and other management positions where salaries are paid fifty percent by each Member Board.

#### **3.4.3.4 Discuss job rotation staff with collective bargaining units**

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

### 3.5 Consortium Management

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

#### 3.5.1 Observations

##### 3.5.1.1 Declining Enrolment

Both Member Boards are expected to face some declining enrolment, which may impact their finances and operations. The planners review all relevant data, including the number of students, when planning routes annually.

There is no formal strategy on how declining enrolment will be addressed and incorporated in financial forecasts for the Consortium because the number of transported students continues to rise given Board programming choices and, at least in Toronto, the impact of declining enrolment on transportation is expected to be fairly immaterial.

##### 3.5.1.2 Long Term and Short Term Planning

A formal strategic planning process that addresses long-term and short-term planning does not exist. A draft strategic plan template has been approved by the Governance Committee, and a draft strategic plan will be submitted in a few months.

Short-term goals and objectives for the current school year and long-term goals and objectives have been developed for the Consortium. However, these goals and objectives have not been operationalized (i.e., key activities have not been delineated, detailed timelines have not been established, and key personnel have not been identified).

##### 3.5.1.3 Cost sharing

The Membership Agreement outlines the cost sharing mechanisms for the Consortium.

Each School Board is responsible for the processing and payment of transportation costs that are identified as belonging to that School Board.

For transportation costs related to buses being shared by the School Boards:

- The transportation management software is used to determine the number of buses that would be required to provide services to each School Board's students, independently;
- The transportation management software is used to determine the number of buses that would be required to provide services to each School Board's students, on an integrated basis; and
- The savings (i.e., the difference between the buses that would be required to provide services to each Board independently and the buses that are required to provide services to the Boards together) are allocated on an equal basis to each School Board.

The optimizations are conducted every four years – during interim years, any costs / savings arising from a change to the number of buses will be allocated to the School Board that is determined to have triggered the change.

This cost sharing process is undertaken on an annual basis for the special education routes.

**Administration Costs:** Each School Board is responsible for the processing and payment of administrative costs that are identified as belonging to that School Board. The Membership Agreement outlines that the administration costs (which include computers, office supplies, network equipment etc.) related to the operation of the Consortium will be borne by each Board for its respective employees.

**Salaries:** Each Board will pay 50% of all the costs associated with the base salary and benefits of the General Manager, Operations Manager and Technology & Planning Manager positions, which provide services exclusively to the Consortium.

**Rent:** The Board on whose premises the Consortium offices are located is responsible for paying all real estate related and facility maintenance costs associated with the operation of the Consortium.

Any administration expense not detailed in the membership agreement or outlined in a separate service agreement are to be shared between the Boards based on the number of students registered in each Board.

### **3.5.1.4 Transportation service agreements**

The Membership Agreement outlines the category of service to be provided by the Consortium to the Boards, but does not address the terms of services or the expected service levels that will be required of the Consortium. The Consortium's high level scope of services includes:

- Management and administration of all home to school transportation (including late buses)
- School to school transportation; and
- Special needs transportation.

Charter transportation for school based activities will not be administered by the Consortium.

No proposed transportation service agreements are available for review.

### **3.5.1.5 Purchase of service agreements / support services**

There are a number of areas that have been identified in regards to what service contracts are required for the Consortium. These include, Human Resources; Information & Technical Services; Computer Services, Material Management; Financial Services; Legal Services; Communications, Printing and Mail Services; and Corporate Services.

There is presently a draft purchase of support service agreement for Human Resource services for the Consortium. There will be no fees charged to the Consortium by the Boards for the provision of the Human Resources Services outlined in the draft agreement.

At the time of the review, no other purchase of service agreements had been drafted or signed.

The Governance Committee has identified Human Resource, Budgeting and Purchasing as being the priority agreements to put in place.

### **3.5.1.6 Procurement policies**

The Consortium follows the procurement policies of the School Board that is executing the procurement. The Board selected to do the procurement is based on who the items are being procured for i.e. Catholic or Public employees. Where goods/services are to be purchased for the joint use of both School Boards/the Consortium, the School Boards' purchasing departments work together to identify the optimal procurement solution.

There is no procurement policy for the Consortium.

### **3.5.1.7 Banking**

The Consortium will use the banking services of each of the respective School Boards for each Board's respective business.

### **3.5.1.8 Insurance**

The Consortium has recently obtained independent insurance coverage through OSBIE. There is no internal procedure/policy as to when the sufficiency of the coverage will be reviewed.

### **3.5.1.9 Staff performance evaluation, training and management**

Staff performance evaluations are currently conducted in line with the human resources policies of the School Boards (i.e., staff employed by the TCDSB are evaluated under the TCDSB's human resources policy, and staff employed by the TDSB are evaluated under the TDSB's human resources policy).

The performance appraisal of the General Manager is to be conducted by the Governance Committee. There is currently no framework outlined for undertaking this appraisal.



Internal staff training and job-related training is provided to staff on a regular basis, and staff training initiatives are planned, documented and tracked. Initiatives to promote cross-training are provided on an informal basis – the training is informal and dependent on circumstances (e.g., supervisor on vacation).

Staff meetings are used to communicate the goals and objectives of the Consortium and to gather the collective opinion concerning the direction of the Consortium.

**3.5.1.10 Succession planning**

The Consortium has not developed a formal succession plan and does not have a formal plan on cross-training their respective staff. However, informal cross-training and professional development does take place and staff have been able to fill in for personnel away on temporary leave. It is the opinion of the General Manager that succession planning is not required as no position is simply awarded to the next in line.

**3.5.1.11 Key performance indicators (KPIs)**

In developing the KPIs, the Consortium considers those factors that directly impact the planning and operation of transportation services. The Consortium will track and regularly review the following KPIs:

Consortium KPIs	
Cost per student	Average run length
Cost per kilometer	Bell time stratification
Cost per vehicle	Trip ratio
Buses per 100 students	Capacity utilization

It is the intention of the Consortium manager to produce an annual report for the Governance Committee that will include a reporting on KPI's.

Other data that would be indicated in this annual report are outlined in the table below:

Additional Data in Consortium Annual Report	
Transportation Grant vs. Expenditure	Breakdown of SPED routes
Transportation Expenditure by Area	Transportation Website visit monitor
Historical Summary of Transportation Expenditure	School Bus loading zones per type
Transportation of special needs students by programming type	Fuel Trends
Operator breakdown by vehicle type	Bell time summary
Summary of Transportation Change requests	School bus safety program summaries
School bus accidents by type	Historical accident statistics by operator

**3.5.1.12 Board-leased school buses**

The TDSB leases a number of school buses and employs a number of school bus drivers; they are deployed on a number of home-to-school bus routes, and serve both the School Boards. However, the TCDSB is not presently charged for the use of these buses. These buses are not part of the Consortium but will, going forward, provide services to the Consortium as if they were a vendor. No contract is currently in place that outlines the terms of services currently provided to the Consortium.

**3.5.1.13 Information management**

Confidentiality agreements governing the use of student data exist, and have been signed by all operators – this complements the operator contract's "use of personal information" clause.

While employees of the TCDSB have signed confidentiality agreements governing the use of student data, employees of the TDSB have not signed confidentiality agreements.

### **3.5.2 Best practices**

#### **3.5.2.1 Insurance**

The Consortium has purchased insurance coverage to reflect its new Consortium status. The Consortium is encouraged to develop a policy that will outline when and how coverage needs are to be assessed and reviewed.

#### **3.5.2.2 Staff performance, evaluation and training**

The Consortium does an excellent job of identifying and tracking staff training and professional development activities. Staff evaluations are carried out as per the policies and procedures of the Member Boards. We encourage the Governance Committee to identify the process as well as goals and objectives against which the performance of the general manager will be assessed. This will help to align the goals and objectives of the Consortium with the general manager's activities and establish performance expectations.

### **3.5.3 Recommendations**

#### **3.5.3.1 Develop a financial strategy for changing transportation requirements**

School enrolment across Ontario has been in steady decline over the last decade. Given that the Consortium currently serves areas expected to be subject to declining enrolment, and given the Ministry's recent notice that transportation funding is to be reduced in line with declining enrolment, it is recommended that the Consortium incorporate a strategy for the management of transportation costs into its long term financial and strategic planning process.

In Toronto, the demographic change causing a decline in demand for transportation services is complicated as programming choices (French immersion and special education) are increasing transportation requirements. These changes should also be factored into the long term strategy and financial forecast of the Consortium.

While elements of this recommended planning process were implemented by each of the separate transportation departments, developing such a plan for the Consortium as a whole will provide the Consortium with a framework that will help it address not only the issue of funding, it will also signal a proactive approach to dealing with issues before they arise – a key element of effective long-term Consortium management.

#### **3.5.3.2 Develop succession planning document**

Succession planning is the process of developing internal people so they have the potential to fill key leadership positions. We acknowledge that key positions will be filled through a competitive process however, we encourage the Consortium to develop a long term succession plan that outlines this requirement as well as the professional development opportunities that will be provided by the Consortium to enhance the potential progression of the careers of employees. Short term succession planning is required to cover sick days, vacation days and other unforeseen employee absence to ensure continuity in the operations of the Consortium. This includes ensuring coverage for the General Manager position should it be required.

#### **3.5.3.3 Execute a formalized transportation service agreement**

The Membership Agreement is primarily an agreement between School Boards that establishes the Consortium; it is an over-arching agreement that specifies the terms and structure of the cooperation to provide student transportation. Distinct from the Membership Agreement is the transportation services agreement, which articulates the service relationship between the Boards and the Consortium. In order to make the above distinction clearer, it is recommended that the Consortium develop and execute a joint transportation service agreement with the Member Boards. The transportation service agreement should include clauses that specify the scope of services to be provided, fees, insurance/liabilities, quality of service, dispute resolution and other terms that the member Boards deem to be appropriate.

#### **3.5.3.4 Purchase of service agreements / support services**

There is presently a draft purchase of support service agreement for human resource services for the Consortium. The Consortium is encouraged to get this agreement finalized and executed. It is further

recommended that all of the other services which the Consortium procures or provides are established via agreements or contracts where the mutual interests of the Consortium and each School Board or vendor are documented and agreed upon. Specially, these agreements should address services provided to the Consortium from its School Boards or vendors and should reflect appropriate fees for the provision of these services.

### **3.5.3.5 Procurement policies**

It is recommended that the Consortium review and formalize its School Boards' policies for appropriateness in transportation procurement decisions, internal controls and work processes. Formalizing these policies will ensure standardization in the procurement methods of the Consortium. It will also allow the Consortium to harmonize each Board's purchasing policies and facilitate increased effectiveness and efficiency, as the Consortium will not need to liaise with both School Boards' purchasing departments whenever it procures a shared resource.

### **3.5.3.6 Information management**

It is recommended that the Consortium ensure that confidentiality agreements are signed by all operators and all staff.

### **3.5.3.7 Key performance indicators**

The Consortium is encouraged to execute on its plan to develop an annual report that includes reporting on key performance indicators for the Operations and Governance Committees. We further encourage the Consortium to work with the Operations and Governance Committees as well as staff to outline performance indicators to be reported on an interim basis (e.g. monthly or quarterly). Key performance indicators will allow the Operations and Governance Committees to assess the performance of the Consortium and make strategic decisions regarding the direction of the Consortium as required. They also allow the Consortium to highlight areas of strength and weakness and to measure the success of efforts expended.

### **3.5.3.8 Board owned vehicles**

We encourage the Consortium to develop and execute an agreement with the TDSB that outlines the services to be provided to the Consortium through Board owned vehicles to ensure appropriate safety, training and other risk mitigation (insurance) measures are in place for all vehicles and drivers providing transportation services to students.

### **3.5.3.9 Long term and short term planning**

The Consortium should establish a documented and inclusive long-term and short-term planning process with goals and objectives accompanied by specific timelines, tasks to be implemented and clear identification of responsible parties. The Consortium should also develop procedures to monitor and report on progress against these strategic goals and objectives at regular intervals. As the Consortium is developed and implemented, a clear and detailed short-term and long-term plan will help Consortium staff and stakeholders to understand the direction of the new organization, to recognize and celebrate accomplishments and to identify areas still to be addressed.

### **3.5.3.10 Cost Sharing mechanism**

The Consortium has a cost sharing mechanism in place. As outlined in section 4.2.1.1 we encourage the Consortium to review the cost sharing mechanism for transportation costs to ensure that there is a fair and equitable distribution of costs between the Boards. The current cost sharing agreement neither encourages the Boards to optimize their policies, nor encourages cost optimization.

### 3.6 Financial Management

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

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

#### 3.6.1 Observations

##### 3.6.1.1 Budget planning and monitoring

The development of the current budget followed the process outlined below:

Each transportation department works with its respective School Board to prepare a transportation budget. For each transportation department, the budgeting process is initiated by the respective School Board and the transportation department works with the School Board to:

- Forecast ridership numbers (with breakdowns by program);
- Forecast personnel numbers (based on expected needs / attrition);
- Forecast transportation costs based on the executed contracts; and
- Forecast other items, such as fuel cost increases or new programs, which may impact the budget.

Budget-to-actual reconciliations are done at the School Board-level on a monthly basis, and are formally compiled and reported on a quarterly and annual basis – if material variances arise, the transportation department works with its respective School Board to identify, understand and resolve the discrepancies.

Based on discussions with the Governance Committee members, it is their intention that for the next budget cycle, one budget will be prepared by the Consortium, reviewed and approved by the Operations and Governance Committee, divided by Board and submitted to each Board to be recorded in their system. There is no procedure documented that outlines the process to be followed.

The job description of the General Manager states he is to provide direction regarding budget control and recommend yearly budgets for Committee approval and prudently manage the organization's resources within those budget guidelines. It does not outline that he is responsible for the development of the budget.

##### 3.6.1.2 Accounting practices and management

Each transportation department follows the accounting practices and policies of its respective School Board. The following procedure is used by the transportation departments to process operator payments:

- The operators prepare an invoice for each School Board, which are submitted via TRACS;
- The invoices are then reviewed by the Operations Manager and the General Manager; and
- The invoices are then processed and sent to the School Boards' respective accounting department for payment.

The School Boards process the invoices in accordance with their respective accounting practices and policies, and conduct monthly reviews to identify unexpected variances (from budget).

The General Manager is working with the accounting departments to set up Consortium only cost centres to track Consortium's expenses.

##### 3.6.1.3 Audit

Each School Board is audited on an annual basis.

### 3.6.2 Best practices/Recommendations

As the Consortium has yet to undertake the development of a budget and does not have a documented policy or procedure as to the process that will be followed, there is insufficient evidence on which to identify best practices or recommendations.

### 3.7 Results of E&E Review

This Consortium has been assessed as **Low**. A Membership Agreement has recently been signed by the two School Boards and is in the process of being implemented. It is recognized that the School Boards' transportation departments have integrated some aspects of their operations and that they operate from the same physical location. . We acknowledge that big steps have been taken since the initial review and there are substantial efforts undertaken by all stakeholders to establish and commence the implementation of the Consortium. The rating in this section is reflective of the status of the Consortium as a little under two months old with little evidence for the Review Team to assess. We highly encourage the Consortium to continue to leverage the strengths evident in each of the individual School Board's transportation departments in the continued development of the Consortium.

The School Boards should continue to work towards ensuring that the Consortium's structure and operations reflect the best practices identified through the E&E Reviews. The transition involved in integrating the School Boards' respective transportation departments into a single, coordinated unit will require effort, dedication, and the support and cooperation of all stakeholders. In turn, this will facilitate the safer, more effective, more efficient and more equitable delivery of student transportation services that will help alleviate the administrative burden of delivering transportation from both the TDSB and the TCDSB.

## 4 Policies and Practices

### 4.1 Introduction

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

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

The observations, findings, and recommendations found in this section of the report are based on onsite interviews with Consortium staff, and on an analysis of presented documents, extracted data, and information available on the Consortium's website. Best practices, as established by the E&E process, provided the source of comparison for each of these key areas. The results of the assessment are shown below:

Policies and Practices – E&E Rating:

Moderate-Low

### 4.2 Transportation Policies & Practices

The goal of any transportation operation is to provide safe, effective and efficient services. For transportation consortia, it is equally important that service to each of the Member Boards is provided in a fair and equitable manner. To support this goal, it is essential that well defined policies, procedures, and daily operating practices are documented and supported. Well defined policies ensure that the levels of service to be provided are clearly established. Documented procedures and consistent operational practices determine whether services will actually be delivered within the constraints defined by each policy.

Two critical factors ensure that service will be delivered safely and equitably to each of the Member Boards: the degree that policies are harmonized; and the consistent application of all policies, procedures, and practices. This section examines these factors and evaluates the policies, procedures, and operational practices of the TTG. The focus is on determining the impact each element has on the delivery of effective and efficient transportation services.

#### 4.2.1 Observations

##### 4.2.1.1 General policy guidelines

The School Boards' policies have not been harmonized. When a single policy does not exist, the E&E Review Team expects the Consortium to explicitly document and identify the differences in policy or procedure between Boards. Also, either the Consortium Membership Agreement or the Consortium policy statements should provide a mechanism to account for the cost differences associated with providing services to the differing criteria.

The TTG has constructed four documents describing and governing its operations. Each is targeted at a different user group, and there is some duplication of content among these documents. The first document is titled "Operation Policy Manual" and is targeted for use by the TTG bus operators. It provides a description of all transportation policies and associated operational procedures. The School Boards' policies are each presented in their entirety within this manual, and a cross reference table is provided. In addition, the introductory section to this manual includes this statement in regards to harmonization: "*As the two Boards combined their transportation services there was a need to standardize operations and procedures as much as possible to help minimize any on road issues that may transpire as a result of the discontinuity of practices. Although the Boards maintain separate transportation policies, the procedures for the delivery of services provided are for the most part consistent and outlined in this manual.*" The second of the three core documents is titled "Toronto Transportation Group Standard Operating Procedures" which is targeted for use by TTG staff and provides all manner of internal operating practices



and procedures for the joint operations, including all of the forms and procedures associated with each of the School Boards' policies. The third document is titled "Toronto Transportation Group Special Needs Transportation Resource Manual" and is targeted for use by bus operators and TTG special needs planning staff. It provides comprehensive information concerning the special handling and service requirements for this high demand student population. The final of the four core documents is titled "Student Transportation Services Resource Manual" and is targeted for use by school building administrators. It provides all manner of information relevant to the schools, duplicating much of the content of the prior two documents.

While comprehensive, the resulting documentation is complex and difficult to maintain given the duplication of information in the four manuals and differences within School Board policies and procedures. While the documentation may technically meet the objective for explicit identification of policy differences, as a whole, it is not readily accessible to users of the transportation service or other stakeholders. Parents and other key stakeholders, for example, must still access transportation policy information through the School Boards' websites or by contacting TTG directly. Each manual on its own is a large document that requires intimate knowledge and regular use to serve as a useful reference. The review team did not, for example, note TTG staff making regular use of the Standard Operating Procedures manual during the interview phase of the E&E Review.

An example of the inconsistency that can arise in trying to maintain the same information in multiple locations exists within the TDSB eligibility documentation. The actual policy statement for the TDSB that is available as a Portable Document Format ("PDF") file via a website link provides the distances listed in the section below and qualifies this by indicating that for grades 9 and above "TTC tickets may be available depending on financial need". However, a statement in the body of the website indicates that transportation will be provided via TTC tickets for all students in grade 6 and higher. Meanwhile, the summary matrix in the TTG Operation Policy Manual indicates that the 1.6 km distance applies only from JK to Grade 3, and the 3.2 km distance from Grades 4 to 6.

The cost allocation mechanism described in the draft Membership Agreement (now implemented Membership Agreement) may also fail to adequately account for the policy differences. Schedule A of this draft agreement describes how operating costs will be shared between the Boards, and how only the savings resulting from combined operations, as realized through a periodic route optimization analysis, will be shared equally. All other costs associated with "the number of vehicles and/or students that each Board is required to transport" are assigned directly to each Board. This approach does not encourage an active policy of integration nor does it document a fair and equitable assignment of costs when routes are shared.

#### **4.2.1.2 Eligibility and allowable walking distances**

Each School Board's policy addresses service eligibility on a distance and program basis. The eligibility distances for each Board are as follows:

- TCDSB: 1.5 km for JK – Grade 8
- TDSB: 1.6km for JK – Grade 5, 3.2 km for Grades 6 – 8, and 4.8 km for Grades 9 – 12

The TDSB policy states that "Transportation is not provided for students attending any school or program at their request, even when distance is a factor". The TCDSB policy speaks to providing transportation for unique circumstances, but does not address specifics. The eligibility policy works by inclusion in that a designated transportation area is developed for each open enrolment school. Exceptions to the distance-based eligibility criteria nevertheless do exist, and program-based eligibility is provided to certain students in each School Board. For example, the TDCSB modifies its distance eligibility such that a minimum number of students must meet the eligibility criteria before transportation is provided. The policy also provides for TTC transit tickets to be provided under various circumstances for certain students. The TDSB, meanwhile, provides for a program-based exception to eligibility for French Immersion students. The combination of substantial differences in the base eligibility criteria and the addition of a number of exceptions to each individual policy greatly complicate any assessment of equity in the delivery of service or sharing of costs within the joint operations.

There are indeed unique circumstances creating a measurable difference in the nature of the transportation service requirement for each of the School Boards. The geographic service area is mostly the same, but the enrolled student population is substantially different between the two Boards. As a

result, the relative density is lower and dispersion of students and schools is higher for the TCDSB than for the TDSB. Given the extremely high density of schools and students within the TDSB, a harmonized transportation policy would likely create a proportionally higher demand for service within the TCDSB. Yet it is equally unclear what influence the current policies are having on transportation demand within each School Board. It is not possible to tell what level of constraint the current disparate policies are having on the ability to integrate and share buses and individual bus runs to a greater degree throughout the system. This, coupled with a cost allocation methodology that discourages or, at a minimum, fails to encourage, integration of bus routes serves as a difficult barrier to identifying further improvements in the effectiveness and efficiency of this transportation entity.

#### **4.2.1.3 Placement of Bus Stops and Allowable Walk Distances to Bus Stops**

The “Summary Comparison” matrix in the “Operation Policy Manual” includes an entry on walk to stop distance that states “Closest Stop” as the applicable allowable walking distance to a bus stop for both School Boards. However, the governing policy statements for both School Boards are silent on this subject. Similarly, there is no specific guidance provided for the placement of bus stops within the system. As a result, stop placement remains at the full operational discretion of TTG staff. Given the heavily urbanized service area, TTG managers report that this discretion is necessary to ensure the safe and equitable delivery of service. However, operational best practices identified by and for other transportation consortia that include service in urbanized areas shows that a documented set of criteria, which can include a statement of exception and discretion on the part of management, provides the most solid basis for ensuring safe and equitable service delivery.

#### **4.2.1.4 Alternative service addresses**

The “Summary Comparison” matrix in the Operation Policy Manual contains an entry on multiple pickups & drop-offs that states they are allowed for both Boards. However, neither School Board policy contains evidence supporting this as a policy. The TTG reports that alternative service addresses are allowed under a regular schedule only, and that this is provided as a standard (undocumented) operating practice. The current coding structure for the student database does not segregate students transported to multiple addresses, which precludes a simple analysis of the extent to which this operational practice is applied.

#### **4.2.1.5 Courtesy transportation**

The summary matrix of the Operation Policy Manual states that courtesy transportation is provided “By Boards Policy/Guidelines”. The TDSB has an “Empty Seats” administrative procedure within their overall transportation policy. This defines that school principals can develop a list of students who are eligible to fill empty seats but that these seats must be given up to eligible students and that no new routes will be developed to accommodate these students. The TCDSB does not have a directly related policy, but one of the exceptions provided under the basic eligibility policy states that “Home to school transportation shall be considered by the school principal for elementary level pupils as a temporary service where individual hardship exists and home to school transportation is the most appropriate response in accordance with the guidelines for extenuating circumstances as established by the Board from time to time”.

An analysis of student data for all transported students indicates that approximately 2,100 students or nearly five percent of all transported students are coded as riding under the “Empty Seat” policy. An insignificant number of additional students (fewer than 40, or less than one-tenth of one percent) are coded as “Accommodation” or “Exception/Board Approved”. This indicates a high degree of compliance with established policies and practices, but still results in a relatively large number of students being transported who are not normally eligible for transportation. In addition, these are all TDCSB students. The impact of these courtesy riders all originating with one School Board on system wide efficiency cannot be known, but certainly serves as a deterrent to further integration of routes and runs. TDCSB students coded as riding under the “Empty Seat” policy are removed for rerouting the following year.

#### **4.2.1.6 Hazardous transportation criteria**

The summary comparison matrix in the Operation Policy Manual does not address hazards. The TDSB transportation policy also does not address hazards, although the subject is extensively covered by the TCDSB. The TCDSB transportation regulation 1 (d) states, in part, that transportation will be provided to elementary students where “...safety hazards, as defined, exist”. The document titled “Hazard Criteria” provided for review lists criteria for defining and applying hazard designations. It was reported that this document has been approved by the TCDSB. The definitions include “Major”, “Moderate”, and “Minor”

hazards, and define the circumstances that must be encountered for the hazard to comply with “Transportation Regulation 1(ii)”. Designated hazards are noted as such through the provision of hazard boundaries on the electronic map within the *EduLog* routing software.

The TCDSB treatment of hazards is in keeping with the expectations of the E&E process. The extreme density of schools and students within the TDSB, meanwhile, results in a unique situation whereby school attendance boundaries themselves are likely to address most hazardous walking conditions. For example, in a less dense environment the placement of a school and the associated attendance boundary may inevitably incorporate a major arterial roadway. Within the TDSB, it is most likely that such a roadway would form one of the boundaries for the subject school. This level of density and the manner in which it affects the drawing of school boundaries is unique to the TDSB among all other Boards in the Province, including the TCDSB. The absence of a hazardous walking condition policy is therefore explainable, and according to TTG management, has not presented any concerns in the past.

#### **4.2.1.7 Student ride times**

The summary comparison matrix in the Operation Policy Manual addresses this subject and provides the following criteria:

- TDSB: 75 minutes, may be longer with Board approval
- TCDSB: 60 minutes, may be longer with Board approval

However, neither of the School Boards’ policy statements contains specific language establishing these parameters. The Policy Operation Manual, which describes operator compliance requirements, states that the criterion is 75 minutes.

Regardless of the source for the criteria, current ride time performance is exceptional relative to either of these standards. Fewer than 100 of more than 30,000 regular education students, on average, have ride times exceeding 60 minutes and the majority of all students enjoy ride times under 20 minutes. Ride times for special education students are not as favourable, but still excellent with approximately five percent of all students exceeding 60 minutes and a majority of students having ride times below 30 minutes.

#### **4.2.1.8 Designation of responsibilities**

While there is no policy document that specifically addresses or describes the responsibilities for each stakeholder group in the delivery of safe and effective services, this subject is covered in various parts of the three core manuals described above. In particular, the Policy Operation Manual incorporates several sections on the contractual responsibilities of the bus operators, and includes copies of various brochures that address the responsibilities of students and parents, as well as other members of the community. The Transportation Services Resource Manual contains detailed and extensive information regarding the responsibilities of school administrators and others.

The summary comparison matrix in the Operation Policy Manual requires all noon hour kindergarten and all special education students to be met at the stop by a parent or guardian. Additional parental responsibilities are mentioned in the “Contractual Requirements” section of the Policy Operations Manual that speaks to encouragement of walking and alternatives to riding the school bus, and under the “72 Passenger Drop-Off” procedural protocol that speaks to the requirement for parents to meet the afternoon drop-off of students. There is also a section of the Transportation Resource manual that describes a citywide program called the Parent Safety program, but this is not specific to parental responsibilities in student transportation. These responsibilities are also covered in the brochures available to parents and included in the Transportation Resource Manual and outlined on the School Boards’ websites.

#### **4.2.1.9 Decision appeal processes**

The TDSB policy contains a detailed administrative procedure describing the appeals process to be followed for this Board’s students. It includes a designated appeals committee, and a defined and progressive process that starts with the transportation office, and then (if not satisfied) includes the submission of an appeals form and action by the committee. A final appeal may be made to the TDSB’s Comptroller-Administrative Services. A unique aspect of the appeals process is the ability of the appealing parent to add a fourth member to the appeals committee that “has no vested interest in the outcome of the appeal”. The TCDSB policy includes a more general statement that “anyone wishing to

appeal a decision or recommendation made by staff can appear in person at the Board's Administrative and Corporate Services Committee to present their case to the Board of Trustees.”

In both cases these processes are Board-centric. There is no common dispute resolution process that is specific to, or administered by the TTG itself. This runs counter to the intent of the E&E process in that there is no common appeals process which increases the likelihood of inconsistent results and inconsistent application of standard operating practices, if not the policies themselves.

#### **4.2.1.10 Bell time management**

There is no information presented in the three core TTG manuals described above that speaks directly to the subject of school bell time management. The TDSB transportation policy, however, does incorporate an administrative procedure on “Staggered School Hours”. Key elements of this procedure include:

- Transportation staff suggests groups of school;
- Consultation required with all key stakeholders;
- Consultation ends by March for September implementation;
- Times not to be altered by more than 30 minutes;
- Once part of a stagger, times can only be changed by a Superintendent; and
- Changes only implemented if bus reduction(s) can be achieved.

The TCDSB policy does not address this subject. A separate document titled “Bell Time Workflow” provides a process describing how TTG actually manages the process. This is an internal document that is not currently incorporated into policy, although operationally the TTG staff manages bell times in accordance with the Bell Time Workflow document for both School Boards.

This workflow diagram indicates that bell time changes originate with a request from the school, and pass through a “stakeholder input” phase before reaching TTG for action. If TTG approves of the change the request then passes through a Superintendent review before being implemented by TTG. If TTG does not recommend implementation, the request goes through a “director’s council”, which can either accept the TTG conclusion or approve the change.

TTG-originated requests do not appear in this workflow. This contradicts the TDSB administrative procedure referenced above, and runs counter to best practices identified during past E&E Reviews.

#### **4.2.1.11 Route planning schedules and strategies**

The TTG runs a unique operation in that a relatively high proportion of transported students are special needs. Also unique is the dense urban environment, whereby only approximately 10 percent of all enrolled students receive transportation services. The different demographics for the two School Boards also results in a situation whereby the regular education transportation requirements are proportionally concentrated with one of the School Boards (the TCDSB). This combination of factors results in a unique set of circumstances and a different approach to route planning and management than is typical for other transportation consortia.

While policies have not been harmonized, and many operational procedures and practices continue to be separate for each of the School Boards, the route planning function has been combined. This function is provided by a team of six planners responsible for all route maintenance and route planning across both School Boards.

Day-to-day route changes, such as moving a student from one stop to another after an address change, are handled by the day to day operations team. Operationally, transportation request forms are filled out by the parent at the school and transmitted to TTG for action. The Transportation Change Notification System (see description in the Routing and Technology section) creates an email notification back to the school once the change is completed, and maintains a history of the changes made and their effective date. TRACS information is updated overnight using the most current Edulog data. Parents may also contact the TTG directly and the information is provided via telephone. The TCDSB only takes requests from the school; no information is taken directly from the parent.

Anything that requires a significant route change, such as the addition of a new bus stop, is generally sent to the planning team for action. As discussed further in the Routing and Technology section, this approach creates a duplicative function that relies on the processing of paper forms. The separation of the operations team by School Board also results in operational practices that vary from one Board's team to the other. This structure is largely the result of managing the transported student population separately within the transportation routing database, and the preponderance of special needs transportation within the system. Taken together, these operational practices rely more heavily on manual processes than is typical in other transportation consortia.

Given that more than 80 percent of all bus runs and bus routes in the system are coded as special needs, the effectiveness and efficiency of the system is heavily influenced by this high-need service, and much of the planning activity is dedicated to this aspect of the system. Annual planning and maintenance of special needs routes is conducted in accordance with the procedure defined in the Standard Operating Procedures manual, and is discussed further in the Special Needs Transportation section below.

The TTG maintains a comprehensive planning calendar that establishes milestone dates and timelines for key annual recurring activities such as completion of the annual Ministry of Education survey, student data rollover, and route planning. In addition, the Operating Procedures Manual contains instructions on establishing a planning database in preparation for the following school year. Taken together, this provides an appropriate framework for meeting the cyclical planning requirements of the transportation system.

Bus operators conduct annual self-audits for each route. These are supplemented by random audits conducted by Consortium staff throughout the school year. The results of these audits are utilized in conjunction with an evaluation of changing demographic data by planning staff in advance of each school year to evaluate the effectiveness and efficiency of the regular transportation portion of the system. An overall bell time coordination strategy was implemented soon after the joint operations were started. It was implemented in two phases, and TTG management reports that significant efficiencies were realized. Since that time regular education routes have been generally static. Tactical changes do occur on a regular basis and during the annual planning cycle. In particular, the dense urban environment leads to constant challenges in accommodating changes to heavy traffic patterns as they occur from year to year.

The "Startup Planning" section of the Standard Operating Procedures manual contains specific instructions on how to build runs and routes that incorporate standard routing techniques such as combination runs and route tiering. Other routing types (e.g., feeders, shuttles, transfers, loops or run doubling) are not covered, nor are specific route efficiency improvement techniques. Nevertheless, there are no explicit restrictions on the mixing of students from the School Boards on the same bus, nor are there any restrictions on utilizing these or other routing strategies in the development of the system.

A system of standardized vehicle sizes is used throughout the route network. The stated purpose is to minimize disruptions when individual runs are moved or reallocated to different carriers. Time, distance, policy, and operating conditions also impact vehicle assignment to individual routes. Minivans, for example, are used when travelling long distances with a small student load whereas 19 passenger buses are preferred in the downtown core in order to more effectively navigate traffic.

Overall, the planning process for regular education routes is well conceived and supported by appropriate procedural documentation. However, there have been few comprehensive or large scale efforts to evaluate or improve overall effectiveness and efficiency since the initial analysis that was conducted when joint planning was initiated. Planning efforts for regular transportation are focused more on the maintenance and tactical improvements to the current structure of routes and schedules. The implications of this approach are discussed further in the Routing and Technology section. Further evidence of the generally static nature of the regular education portion of the system is provided in how information flows to and from the operators and users of the system.

Operators receive route information for the upcoming school year only two weeks prior to the start of school. The contract requires that the operators perform a dry run, and route errors are fed back to the TTG for correction after the dry runs and then on an ongoing basis throughout the school year. Operators are not consulted prior to the creation or modification of routes, however, and few substantive changes are possible before the start of the school year. All communication regarding routes and schedules to parents is transmitted through the school. Each school has access to its run and route data via TRACS. In combination, this approach works only as long as bus routes are relatively static from year to year. Any

major change to the structure of routes and schedules would require significantly more notice and a higher degree of information dissemination in advance of the school year's start.

## 4.2.2 Recommendations

### 4.2.2.1 Simplify guiding documents

While the purpose and structure of the Operation Policy Manual, Toronto Transportation Group Standard Operating Procedures, and Student Transportation Resource Manual are laudable their size, complexity, and duplication of information can lead to misinterpretation, misuse, and lack of utility as reference documents. The TTG should consider trimming their size and complexity and reorganizing the information such that each element of information is presented only once. The TTG should consider creating a common policy and procedure manual accessible to, and for use by all stakeholder groups. This can be supplemented by an internal procedures manual that provides additional information relevant only to the TTG staff, and a contractor reference guide that contains information relevant only to the operators and not already incorporated into the operators' contractual agreements.

### 4.2.2.2 Enhance policy documentation and work toward policy harmonization

The current School Board transportation policies contain significant differences that greatly complicate the regular assessment and improvement of system wide effectiveness and efficiency. Greater standardization of service delivery standards would promote greater cooperation, further integration of TTG operational practices, and facilitation of increased route sharing and integration between the School Boards.

A logical starting point for harmonization is to focus on developing a common TTG policy in areas not currently covered by either School Board's transportation policy. Examples of these could include the addition of a common policy for allowable walk distance to bus stops, supplemented by an operational procedure defining criteria for the safe placement of bus stops. Also, operational practices would benefit from a common policy regarding the protocol for allowing multiple service addresses for eligible students.

### 4.2.2.3 Develop an enhanced bell time management policy

The current protocol does not clearly facilitate TTG's initiation of proposed bell time changes for the purpose of improving transportation effectiveness and efficiency. A critical best practice identified in prior E&E Reviews is an expectation that transportation consortia initiate and evaluate school bell time structures, with final approval of any recommended changes contingent on demonstrated savings and at the discretion of the School Boards. The TTG should consider adopting a similar policy and operational expectation in order to infuse a culture of continuous improvement in the route planning function.

## 4.3 Special Needs Transportation

### 4.3.1 Observations

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

#### 4.3.1.1 Special needs policies

Each School Board's transportation policy specifically establishes eligibility for transportation for all students with identified special needs. The actual and specific requirements are determined as part of the IPRC process, recorded on the transportation request form (unique to each School Board), and executed by TTG. Staff are not generally involved in making these determinations. Each of the four core guiding documents addresses unique aspects of special needs transportation. For example, the Operation Policy Manual includes separate sections describing operator responsibilities for wheelchair service and developmentally delayed students. A separate public brochure describing special needs transportation is also included in this manual. The comprehensive Toronto Transportation Group Special Needs Transportation Resource Manual does provide a one-source detailed instruction manual for bus operators and planning staff. Collectively, the guidance provided by the various documentation meets the expectations of the E&E process, although the issues of complexity and utility for daily use by staff noted earlier also apply to the special needs documentation.



#### **4.3.1.2 Special needs planning guidelines and practices**

The Standard Operating Procedures manual covers the operational procedures for adding and changing a special needs student route assignment. In addition, Section 5.2 covers “Startup Planning”, and includes a text-based outline of the tasks to be performed and the timeline for route planning for the following year. 33 unique steps are included, and this section also covers elements on how to plan specific bus routes. Special needs bus drivers inform families of daily changes. Parents who subscribe also receive TCNS e-mail notifications when there are changes to their children’s transportation schedule.

#### **4.3.1.3 Driver Training**

The Drivers’ Qualifications and Responsibilities section of the Operation Policy Manual and certain subsequent sections cover driver training requirements and schedules in detail. Included are the basic licensing requirements as well as specific requirements for first aid training, among others. While this manual includes several references to the requirements of special needs students, such as sections on wheelchair services and transportation of developmentally disabled students, there is no specific reference to extra training requirements for drivers of special needs vehicles.

### **4.4 Safety policy**

#### **4.4.1 Observations**

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

##### **4.4.1.1 General safety policies and guidelines**

The TTG employs a full time Safety Officer whose sole responsibility is to administer the TTG’s safety and contractor compliance programs. Operator and bus driver safety and safety training requirements are detailed in the Operation Policy Manual. Operator requirements include bus evacuation drills for students. Safety programs for schools and students are provided under a separate contract with one of the bus operators. These programs include, among others:

- Buster the Bus First Rider program
- Back to school safely program

The Safety Officer conducts operator site audits for every operator every year.

The TTG is also a recipient on a number of distribution lists from the municipality for safety related items. Examples include maps regarding snow removal and road closures. The TTG has specific contacts within various departments of the municipality to deal with issues as they arise. The TTG’s overall safety program is in keeping with the expectations of the E&E Review process.

##### **4.4.1.2 Use of cameras**

The TTG does not currently utilize any cameras on buses.

##### **4.4.1.3 Inclement weather procedures**

An inclement weather protocol is included in the Policy Operations Manual. This document establishes a clear and concise eight-step protocol describing when and how inclement weather related service cancellations are determined and processed. The School Boards do not currently allow for system-wide early dismissal in Toronto.

##### **4.4.1.4 Accident and incident procedures**

A TRACS reporting tool has been implemented in the current school year for the self-reporting of all accidents and incidents by carriers, regardless of severity, when students are on board the bus. This requirement includes reporting of accidents, behavioural incidents, vandalism, or any other type of incident. The operator compliance requirements are outlined in the Operation Policy Manual. The process for accidents, incidents, and missing children is also documented in the Standard Operating Procedures Manual.

The operator is contractually obligated to notify the School Boards when buses are running more than 15 minutes behind schedule. The contractual requirements, as outlined in the Policy Operation Manual, require that “Operators are required to provide a tracking mechanism to capture and report performance data to be made available to the Boards.”

#### **4.4.1.5 Maximum age of vehicles**

By contract, the maximum allowable vehicle age is 12 years.

#### **4.4.2 Best Practices**

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

##### **4.4.2.1 Safety Officer**

The assignment of a regular full-time Safety Officer responsible for all safety and operator compliance functions represents a best practice that provides for an appropriate level of attention and focus on this critical aspect of transportation operations.

#### **4.5 Results of E&E Review**

Policies and Practices development and implementation has been rated as **Moderate-Low**. The TTG provides a comprehensive set of policy and procedural documentation that addresses all aspects of transportation operations. The E&E Review also indicates a high degree of compliance with the policies and procedures as currently documented. However, a key aspect requiring further attention is the absence of policy harmonization which is exacerbated by very significant differences in, and the relative complexity of, the policies for the two School Boards. The documentation does a good job of eliciting these differences, but the documentation itself adds to the complexity in the way in which the information is presented and duplicated among the various manuals.

## 5 Routing and Technology

### 5.1 Introduction

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

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

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

Routing and Technology – E&E Rating:

Moderate-High

### 5.2 Software and technology setup and use

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

#### 5.2.1 Observations

##### 5.2.1.1 Routing software & related technologies

The TTG uses the *EduLog* routing software application, which has been in place for the entire history of joint planning between the School Boards, and individually for a number of years with the individual School Board prior to the initiation of joint planning. The TTG also utilizes several supporting technologies and software applications:

*TTG and School Board Websites* – The “schoolbus.to” web link serves as a portal to the individual School Boards’ websites, each of which includes a section focused on transportation services. These sites contain the following features and information:

- TCDSB: links to all transportation policy documents and safety program information; a link to *WebQuery*, an *EduLog* add-on tool that allows a user to determine the schools a student is eligible to attend and the available bus stops; and links to route maps and stop information for all bus routes, listed by school.
- TDSB: links to all transportation policies and related safety and regulatory documents; and links to transportation related forms.

*TRACS* – A web-based software program available to schools and bus operators that provides customized and targeted information extracted from *EduLog* daily, including route data and forms.

*TCNS* – An internally developed, web-based system to manage the flow of information related to transportation changes for students; it facilitates notification and status reporting.

*WATS* – A web-based software utility of the TCDSB used for managing the provision of TTC passes. *WATS* is also used to track and manage taxi use and limited field trip service (for TCDSB) for trips requiring Wheelchair services. Schools manage their own field trip services for all other students.

*ArcGIS* – A GIS software application used internally at TTTG for modeling, reporting, and analysis in support of school boundary changes and other ongoing analyses.

*Telephone, fax, email* – The TTTG has a telephone system that directs calls to the appropriate operational team and allows for voicemail messages to be left for specific staff members. This is supported by a general fax number, which is utilized for the receipt of transportation request forms, and individual email addresses for each staff member.

This mix of software and technology tools is appropriate to the needs of the TTTG given current operational practices. A heavy reliance is placed on the manual management of data and information throughout the TTTG, with a heavy paperwork flow of transportation request forms and outgoing route information for carriers. Information is “pushed” to carriers and users of the system electronically via *TRACS*, the various websites, and *WebQuery*, but manual processes and supporting technology such as telephone, fax, email, and *TCNS* still predominate throughout TTTG’s operations.

### 5.2.1.2 System backup and disaster recovery

All related processes and procedures are contained within a document titled “Toronto Transportation Group Disaster Recovery & Business Continuity Plan”. This document provides a background discussion, contact information for each staff member involved with ensuring business continuity at the TTTG and service providers and School Boards, a chronology for data backup processes for each system in use by TTTG, and a cross-reference for potential failures to each recovery protocol that should be followed, including protocols to be followed for each of the following failures:

- Primary server failure;
- Site failure;
- TTTG staff incapacitated;
- School bus operations incapacitated; and
- TTTG relocation.

This is an excellent document, and the processes it communicates are in keeping with the expectations of the E&E Review.

### 5.2.1.3 Staff training

Training on the TTTG’s software and related technologies is largely an internal function. Many of the staff members have been long time users of the software and additional on-the-job training, as required, is generally provided by these staff to other staff. The TTTG also participates in regular monthly *EduLog* webinars, and hosts an annual workshop for *EduLog* users from TTTG and other consortia that brings *EduLog* training staff onsite. TTTG staff also participates in periodic *EduLog* user conferences. Additional training support is available via the documentation provided in the Standard Operating Procedures manual.

This approach is a relatively informal but generally effective approach to staff training. It is effective largely because of the long tenure and low turnover in staff. A more rigid skills-based and documented training program would be required if the TTTG experienced higher staff turnover.

## 5.2.2 Best Practices

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

### 5.2.2.1 The Toronto Transportation Group Disaster Recovery & Business Continuity Plan

This document is an excellent document that is broad in scope and application. Not limited to just data backup and recovery, this document covers all eventualities and provides clear guidance for the organization to adapt to and recover from all manner of service continuity disruptions. As such it serves as an excellent model to be emulated by other transportation consortia.

### 5.2.3 Recommendations

#### 5.2.3.1 Develop an enhanced skills-based training program

The TTG benefits from a staff of relatively long tenure and experience, particularly in supervisory and management positions. On the expectation that staff turnover will occur, the TTG should consider enhancements to the current training approach. These enhancements should focus on identifying skills and requisite training needs for each individual in the organization. The focus should be on developing the skills required to master individual jobs, but also to ensure an adequate amount of cross-training to mitigate the risk associated with unexpected absences or staff turnover. Documentation should be provided including an individualized training agenda and record of completion.

### 5.3 Digital map and student database management

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

#### 5.3.1 Observations

##### 5.3.1.1 Digital map and map accuracy

There is one consolidated digital map for the entire service area. The original map is based on GIS source data provided by the City of Toronto, with basic setup characteristics (e.g., road speeds) calibrated by *Edulog* during the setup process. The map contains additional layers of information, such as parks and bodies of water, and is coded to visually highlight certain characteristics, such as one-way streets. All relevant boundaries are contained within the map, and overall accuracy is reported to be high. However, maintaining the map is a challenge given its size and the large amount of construction and ongoing change occurring within the municipality.

Hazard boundaries within *Edulog* have been established for the TCDSB but not the TDSB as described in the Policies and Practices section. Additionally, certain road characteristics have been established where necessary to restrict safe walking paths (e.g., “no cross” or “no travel”). The density of students and schools for the TDSB largely negates the utility of hazard boundaries, as described in the Policies and Practices section.

Roughly 400,000 student records are contained within the *Edulog* database. Only a small fraction of these receive transportation services, and efforts at maintaining accuracy are focused on the transported student records. At the time of the review, 1,568 records had no associated address, 3,858 addresses fall outside city limits, and 3,842 addresses (or less than one percent) were unmatched to the map. This is still a relatively high proportion of errors and it is somewhat unclear as to the cause. Most likely, the errors are the result of data entry inaccuracies resulting from the data management protocol discussed below, and are not reflective of a problem with the accuracy of the underlying digital map.

##### 5.3.1.2 Default values

On a tactical day-by-day basis, identified errors in calibration are handled by forcing bus route timing with manual adjustments to the routes themselves. Given the size and complexity of the map, TTG has determined that making ongoing changes to the calibration of road speeds and the like without a clear understanding of how these changes will impact the entire system is unwise. In a subsequent effort, a limited number of TTG staff are provided with access and tasked with determining whether the accumulated errors are due to a temporary consideration (e.g., construction) or a more permanent factor. In the latter instance the underlying map characteristics will be updated. While somewhat ad hoc, this approach is suitable to the unique needs and operating conditions of the TTG.

Feedback from bus operators is solicited in the form of an annual self-audit for each route. Additional inaccuracies are determined by the operators and communicated to the TTG on an as-needed basis. When received, the route planners investigate the error and correct the route direction and/or timing as

per the description above. Operators reported during the E&E Review that this process does not always result in the timely correction of route errors. Regular live route audits are also conducted by operational staff.

### 5.3.1.3 Student data management

There is a single student database within *Edulog*, and it contains all student records from both School Boards. The student database contains approximately 400,000 student records attending more than 850 distinct programs at almost 800 individual school buildings. The size of this database coupled with the fact that only about 10 percent of all enrolled students receive transportation services creates a unique environment and unique data management challenges for the TTG.

The relatively high number of unmatched student records illustrated earlier provides one example that helps define the nature of this problem. To maintain the accuracy and integrity of all student records as the data gets passed electronically to *Edulog* implies that TTG data entry at all schools must be accurate for all 400,000 students. This represents a complex undertaking where even in the best of circumstances a small rate of error can be expected. This is typical in all transportation consortia and exacerbated in the TTG. A unique circumstance arises for the TTG in that, not only is the quantity of data so much greater, but managing and correcting errors on all student records results in much effort being expended on maintaining nine out of ten student records for students that are not even eligible for transportation. A natural conclusion, therefore, is to focus on maintaining the accuracy and integrity of the 10 percent of eligible student records. Many of the “unmatched” students and other errors are likely attributable to ineligible students, and therefore of marginal relevance to the TTG.

Much of the maintenance activity to ensure the record accuracy of the approximately 42,000 transported students therefore occurs within *Edulog*. There is a weekly download of “adds, changes, and deletes” data from the SIS of both School Boards (Trillium), but a transportation request form is still submitted for each change directly to TTG from the receiving school for all special needs, alternative address, or program related requests. In the case of the TDSB, a paper form is submitted for all transportation requests. This produces a significant flow of paper and results in a heavy reliance on manual processes in comparison with other transportation consortia. The electronic data exchange is utilized to update the records for regular transportation students automatically, but a manual review of the change is still performed in most cases.

Forms for special education and program related transportation are initiated by the receiving school, and the TTG has a turnaround time standard of four business days to establish service changes. The form is sent to the operations staff of TTG responsible for the school where any errors or initial communication with the school is handled. These processes are still largely segregated between the School Boards, with operations staff performing these functions for each individual Board using forms that are also unique to each Board. All required data is extracted from the form and verified or manually entered in *Edulog*. Assuming the change does not disturb the bus route or run (e.g., no new bus stop is needed and an overload condition is not created), the operations staff completes the change and the TCNS system is used to provide notification to the school that the change is completed. If more detailed planning is required, the form is passed on to the TTG planning staff for action. In all cases, once the changes are complete, updated route information is also available to the schools via the TRACS system.

The weekly download of student data is administered by one TTG staff member, who executes the upload into *Edulog*, runs various exception reports, investigates, and cleans up the resulting errors. There is also a single complete download of student data that occurs in September of each year. An annual upload of pre-registration data occurs as part of the annual route planning cycle, but the grade rollover for other students occurs within *Edulog*. The annual planning cycle occurs on the rolled-over data, inclusive of the pre-registration data.

Overall, the current student data management processes are functional and meet the operational needs of the TTG as currently constructed. The processes result in a reasonably accurate and complete database for route management purposes, and are appropriate given the size and complexity of the School Boards’ enrolment relative to that of the transportation operation. However, the processes rely heavily on a flow of paper request forms and a redundant notification system. The processes are also largely segregated by School Board. While TTG’s operating environment is unique among consortia, current processes do not encourage integration of services and rely heavily on a robust operational staff and manual, paper-based processes. This largely runs counter to the intent of the E&E assessment.



#### 5.3.1.4 Coding structures

Student records within Edulog are identified using a hierarchical series of system-generated, and manually entered codes. The key elements of the coding structure include:

- *School of attendance* – This is either a four letter, or a four digit code, the difference making the school identifiable by School Board.
- *Program* – This identifies any of 41 unique assigned educational programs.
- *System Eligibility Code* – This is an automatically generated code that is assigned by *Edulog* to a student record based on the eligibility criteria established for a school-program-grade combination. These are restricted to those defined within the system, and include: eligible; eligible due to hazard or Board approval (as defined by an established boundary within the system); ineligible – outside attendance area; and ineligible – within walk distance.
- *User Eligibility Code* – Within the TTG, this manually entered code is used as an “Assignment Criteria” to refine and/or redefine a student’s baseline eligibility as calculated by the system or to identify a specific type of service (e.g. morning only). TTG has limited these to a total of 11 relevant codes, as outlined in Table 1 below.
- *Special Needs Flag* – This is a binary (yes/no) code that identifies a student as special needs and enables the use of the supplementary special needs codes.
- *Special Needs Codes* – A series of 11 supplementary codes are provided that are used singly or in any combination to identify a special needs student’s particular equipment or service needs. Each code is coupled to a visual icon that prints on route forms for easy identification by bus drivers.
- *Transportation Mode* – This is a series of six codes that describe the type of vehicle or transportation mode to which an eligible student is assigned. These include: TTC (transit), Van (small 19 passenger Bus), Big (large 72 passenger bus), Mini (mini van), WC (wheelchair accessible vehicle), and Taxi.

This is an appropriate, relevant, and logical coding structure that provides most of the information required for the day-to-day management of the transportation system. It also provides the ability to rationally analyze and report on system-wide trends and performance without becoming burdensome to maintain. The linking of special needs codes to visual icons for ease of identification is a particularly noteworthy addition to the coding structure. Table 4 provides a summary cross-reference for the system eligibility and user eligibility codes for all eligible students in the database.

Table 4: Coding for Eligible Students

User Code	User Code Description	System Code					Total
		0	1	12	13	93	
0	Eligible	683	214	94	142	7	1,140
1	Hazard	64	287	4	10	1	366
10	To school transportation only	48	18	60	63	13	202
12	Outside attendance area	83	13	26	23	65	210
13	Within walking distance	67	21	35	18	34	175
20	From school transportation only	82	34	119	152	14	401
25	Eligible but no transportation required	40	45	15	29	2	131
30	Accommodation	0	1	13	10	2	26
40	Sibling travelling with student in SpEd	361	194	229	739	1	1,524
50	Alternate address	5,861	1262	3901	1993	241	13,258
55	All Eastern Rite students	712	13	72	32	0	829
60	Grandfathered students	19	2	46	2	0	69
70	Empty seat students	219	160	450	1255	25	2109
80	Exception with Board approval	0	3	7	2	0	12
93	No code (default)	24	10	4	5	8	51
99	No code (default)	8,638	5,527	3,987	2,469	8,69	21,490
Total		16,901	7,804	9,062	6,944	1,282	41,993

Bus routes are coded in the system to indicate the geographic area of origination within the service area, the operator assigned, and which School Board pays for the route. Bus runs are coded to indicate the “anchor school” (generally the last school served on the run), and the type of run (morning or afternoon, special needs or regular, noon). Runs are not coded to indicate whether they are part of a tiered route or whether the run serves multiple schools. There are no transfers currently in use within the system, so this coding is not currently required. Overall, the coding of runs and routes is functional and suited to the operational needs of the TTG, but somewhat limited for analytical and performance reporting purposes.

### 5.3.2 Best Practices

#### 5.3.2.1 Special needs coding icons

The use of unique icons to identify special equipment needs is an excellent enhancement of the baseline coding structure that provides a fast, visually distinct identifier for bus drivers and other stakeholders to easily track these requirements. This represents a best practice to be emulated by other transportation consortia.

### 5.3.3 Recommendations

#### 5.3.3.1 Reengineer student data management processes

There are unique data management challenges faced by the TTG. Manual processes have evolved to ensure that the volume of daily changes and preponderance of special needs transportation requests are accurately handled. This has nevertheless increased staffing and record keeping requirements with requests passed between the operations and planning functions, a heavy reliance on paper forms, and duplicative notification systems. The TTG should strongly consider undertaking an effort to streamline these processes and introducing a heavier reliance on automation and automated processes. This should include full integration of the operations function between the School Boards, a more distinct separation of the responsibilities for route changes between planning and operations, and a movement toward more robust use of TRACS for distributing change notifications and updated route information to schools and operators.

## 5.4 System reporting

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

### 5.4.1 Observations

#### 5.4.1.1 Reporting, data analysis, and performance measurement

The TTG runs numerous work lists within *Edulog* for various operational purposes on an ongoing basis. There is no regular program of data reporting to the School Boards. However, there is a record of various reports that have been produced for the School Boards to analyze and or address specific issues and concerns over the years. The TTG has also begun to develop a set of KPIs for this purpose. These metrics are calculated on a monthly basis and are tracked for trend analysis. This program began with the start of the current school year, and data has been accumulated for three consecutive months as of the time of the E&E Review.

TRACS has also been set up to provide end users (schools and operators) with a host of customized and customizable reports that provide information targeted to the specific user. TTG staff is also skilled at creating data extracts and reports, and has worked with senior *Edulog* to create other regular reports, such as monthly mileage reports. Overall, the use of reporting for operational and internal purposes is appropriate. The use of KPIs beginning with the current year is an excellent addition.

### 5.4.2 Recommendations

#### 5.4.2.1 Enhanced reporting and performance measurement

The TTG should strongly consider enhancing and expanding the creation and reporting of KPIs. The addition of a regular program of summary reporting to the envisioned Consortium's governance structures and the tracking of trends over time will provide an excellent foundation from which to build a culture of continuous improvement in the delivery of transportation services with the TTG service area.

## 5.5 Regular and special needs transportation planning and routing

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

### 5.5.1 Observations

#### 5.5.1.1 Bus route planning and management

Route planning is a centralized, consolidated, and specialized function within the TTG organization structure. There is a team of five planners that report to a single supervisor responsible for special needs route planning. This function consumes the majority of planning resources due to the disproportionate number of special needs students relative to regular students when compared to other consortia in the Province. Special needs route planning is conducted on a global basis once annually, with as-needed updates and changes on a regular basis throughout the school year. A separate and smaller team is responsible for regular education route planning, which is generally more static than special needs and focuses primarily on program transportation, although an annual review of these routes is also undertaken during the planning cycle.

The senior planning staff of the TTG are highly capable users of the system and its advanced functionality. In addition to regular route maintenance activities, periodic analyses are conducted in support of various School Board initiatives. Examples include the integration of bus routing on the creation of the joint operations discussed in the Policies and Practices section, and a high school and school relocation transportation analysis performed for the TCDSB since that time. A route optimization was conducted for the high school study to identify the number of additional buses required.

Special needs route planning is fully integrated between the School Boards. Special needs and regular bus routes are mostly operated as separate systems. There are currently 399 students who have some form of special needs identification that ride on a 72-passenger vehicle. There is an effort to allow for

siblings of special needs students to ride on special needs vehicles, and a user eligibility code is assigned to these students. The data indicates a total of 1,524 students with this code.

**5.5.1.2 Analysis of system effectiveness<sup>7</sup>**

Current route, run, student, and bell time data was extracted from the *Edulog* system to analyze system effectiveness. Given the disproportionate impact of special needs transportation requirements within the TTG system, the regular and special needs components were evaluated separately. Each of these components has very different demand and service delivery patterns.

The regular transportation component of service delivery is based on a two-tier system, with service provided by a fleet of large buses each with a nominal rated capacity of 72 seats. These buses generally provide four bus runs each day, two in the morning and two in the afternoon, with each individual run designed to service the population of one school. Runs from both School Boards are then combined together to create the daily route for each bus.

Figure 7 displays the number of students transported to schools starting at each of the time periods indicated. For clarity, this presentation is restricted to schools and programs where transportation is provided to 50 or more students. We see from this chart that there are clusters of students transported to schools starting at 8:30, and again between 8:45 and 9:00. This separation, coupled with relatively short run times and the ability to drop students off at school in advance of the starting bell time facilitates the tiering of bus runs.

**Figure 7: Transported students by school start time (schools with 50+ transported students)**

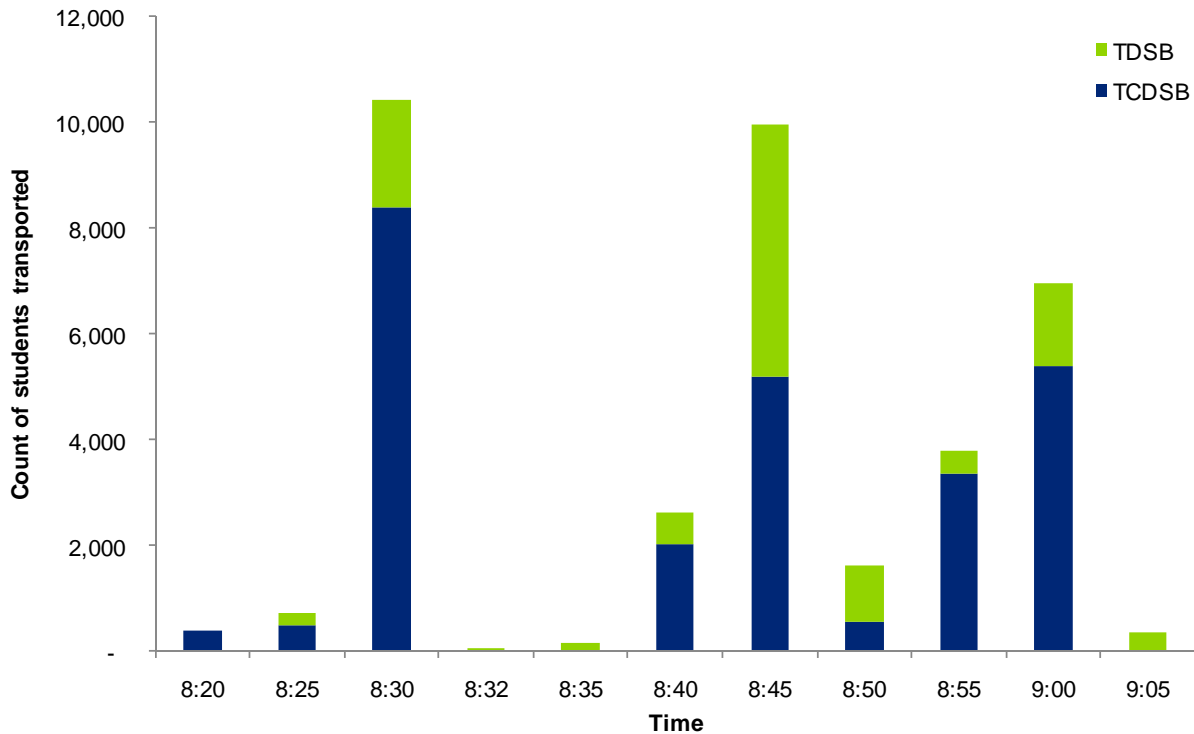
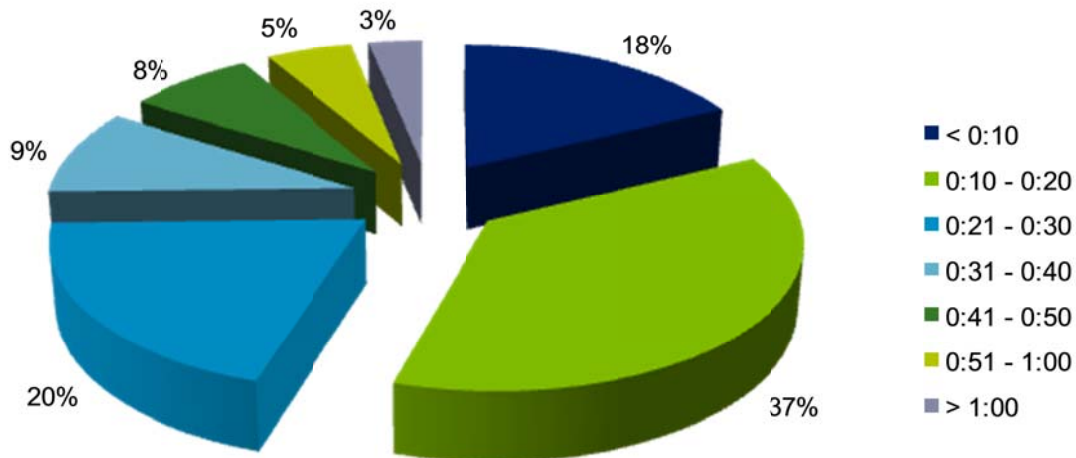


Figure 8 illustrates the relatively short run times by taking all 1,454 morning and afternoon regular bus runs (this analysis ignores midday runs) and grouping them into 10 minute time ranges. We see from this illustration that 18 percent of all to and from bus runs are under 10 minutes in length, and that fully 75 percent are less than 30 minutes. Just eight percent of all regular home to school bus runs exceed 40

<sup>7</sup> All data reported in this section of the report refers to data collected while the E&E team was on site. There may be inconsistencies with some previously reported Ministry data due to the different timing of the data collection.

minutes with students on board. This is very telling, particularly given the dense urban environment and traffic considerations that go into bus run design in the TTG.

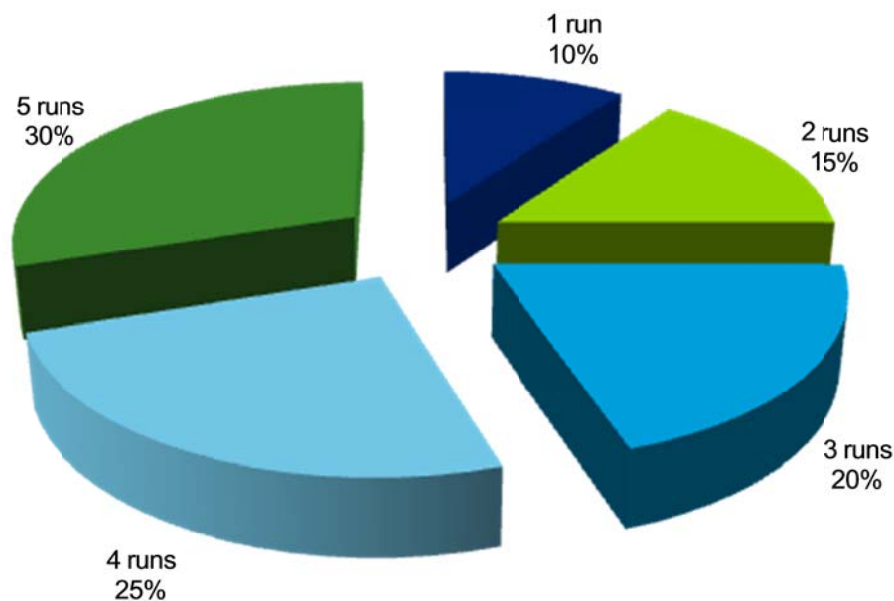
**Figure 8: Percent of runs, by run time**



Run times also provide a surrogate for understanding student ride times, a key measure of overall system effectiveness. The TTG reports fewer than three and a half percent of all regular education students have morning or afternoon ride times that exceed 40 minutes, with an extraordinary 80 percent having morning and afternoon ride time of 20 minutes or less. An independent calculation completed as part of the E&E Review reveals slightly different results, but largely in line with these reported numbers. In both cases, and even adjusting for an urban environment where we expect relatively short ride times, this represents a very high level of service delivery.

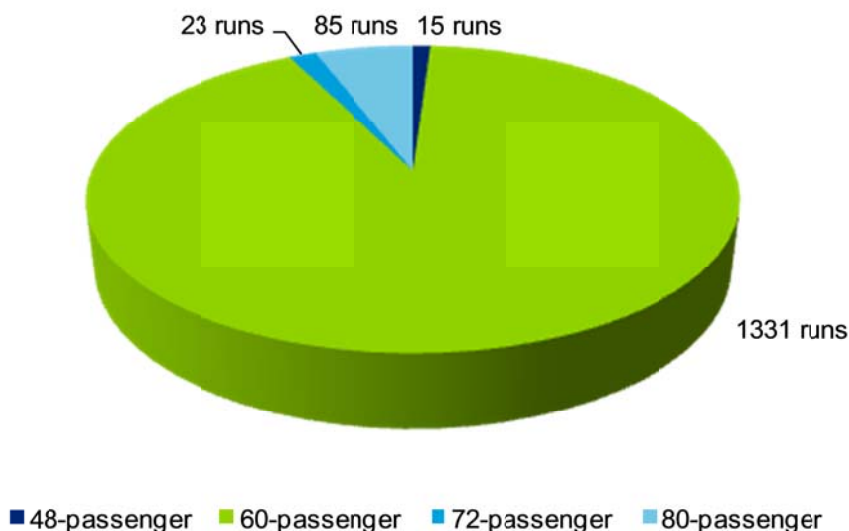
The efficiency of TTG regular transportation routes are built on the premise of reusing each bus multiple times over the course of the service day. The 1,454 individual daily home to school bus runs are serviced by 395 school buses, each of which performs a minimum of two (one morning and one afternoon) runs, with most however serving either four or five daily runs. This provides for a reasonably high level of asset utilization. However, when considered in the context of the school start times illustrated in Figure 7, it appears that further improvements to asset reuse and overall efficiency would be possible with a further reallocation of school bell times into additional time tiers or with greater separation between the existing tiers.

**Figure 9: Regular routes by count of daily runs**



The level of asset utilization must be balanced against that of capacity utilization on each individual bus run. As mentioned earlier, the regular transportation component of the TTG system is operated with a fleet of buses each of which has a nominal capacity of 72 seats. The actual size of the buses used on each route can vary, however, as does the planned maximum capacity used by TTG staff in constructing each bus run. As illustrated in Figure 10, the preponderance of runs have a maximum planned load in the *Edulog* system of 60.

**Figure 10: Edulog's reported bus capacity (regular home-to-school bus runs)**

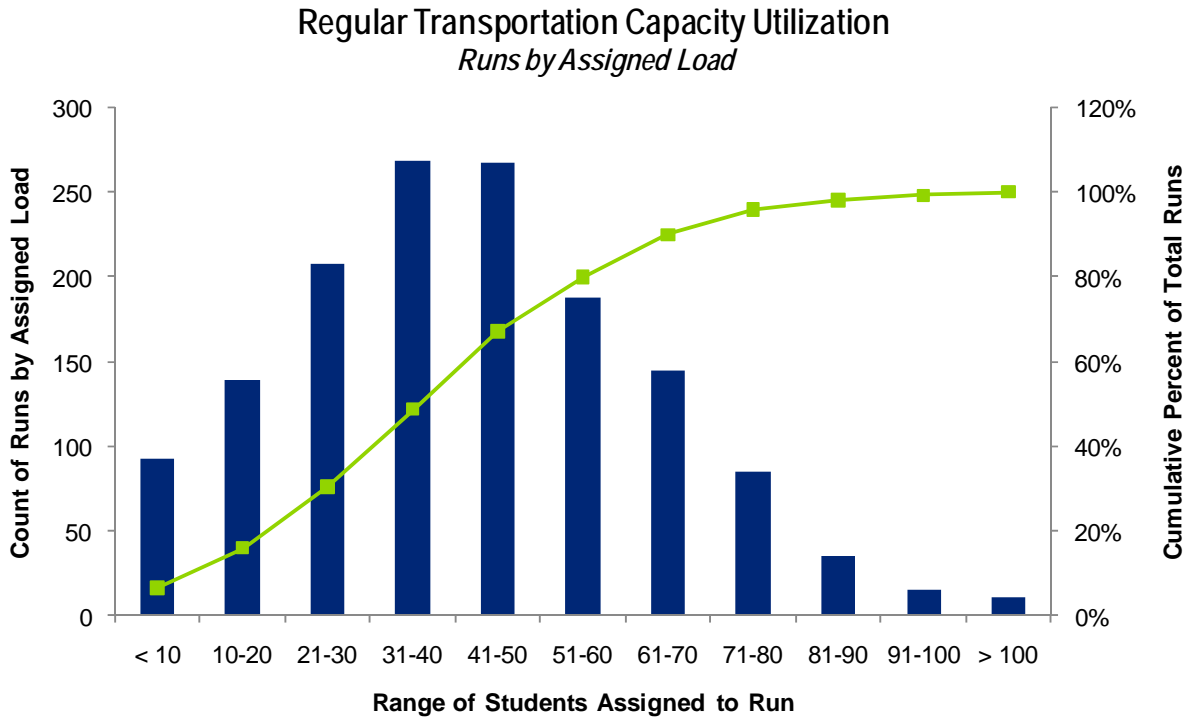


When measured against the standard established by TTG within the planning software, the average capacity utilization across all morning and afternoon home to school bus runs is 70 percent, which is within the expected range. However, when we instead examine the number of students assigned to each bus run, a somewhat different picture emerges. We see from this presentation that a significant number of the system's regular bus runs are lightly loaded, with nearly a third of all runs having fewer than 30 students assigned. Given the dense urban operating environment, this may point toward an opportunity to



improve overall efficiency further through increased capacity utilization, or at least through focused attention on those runs that are particularly lightly loaded.

**Figure 11: Regular transportation capacity utilization (runs by assigned load)**



The system described above provides for some sharing between the School Boards, although this is largely limited to the sharing of buses on routes rather than students on runs. The system’s 1,454 daily home to school runs include just 69 combination runs where students from multiple schools are picked up and delivered to each school in sequence. Of these, only one is readily identifiable as including students from both School Boards. Of the 395 daily bus routes, 94 (24 percent) perform runs serving schools of both Boards. In these cases a bus may perform a run to a TDSB school followed by one to a TCDSB school, but there is no mixing of students on the bus. Given the differing characteristics of attendance for each Board, and the relative density that results in small school boundaries across the service area, this represents a reasonable level of sharing.

When considered as a whole, the regular transportation component of the TTG network is a reasonably efficient and highly effective transportation system. There are certainly unique demographic and topographic conditions that influence the design and operation of the system, such as system-wide density and unpredictable traffic challenges. These challenges also, however, create unique opportunities available only to the TTG. Additional route tiering with judicious bell time coordination and improving the capacity utilization of runs currently on the low end of the utilization range are likely to yield additional efficiencies in the regular transportation component of the system.

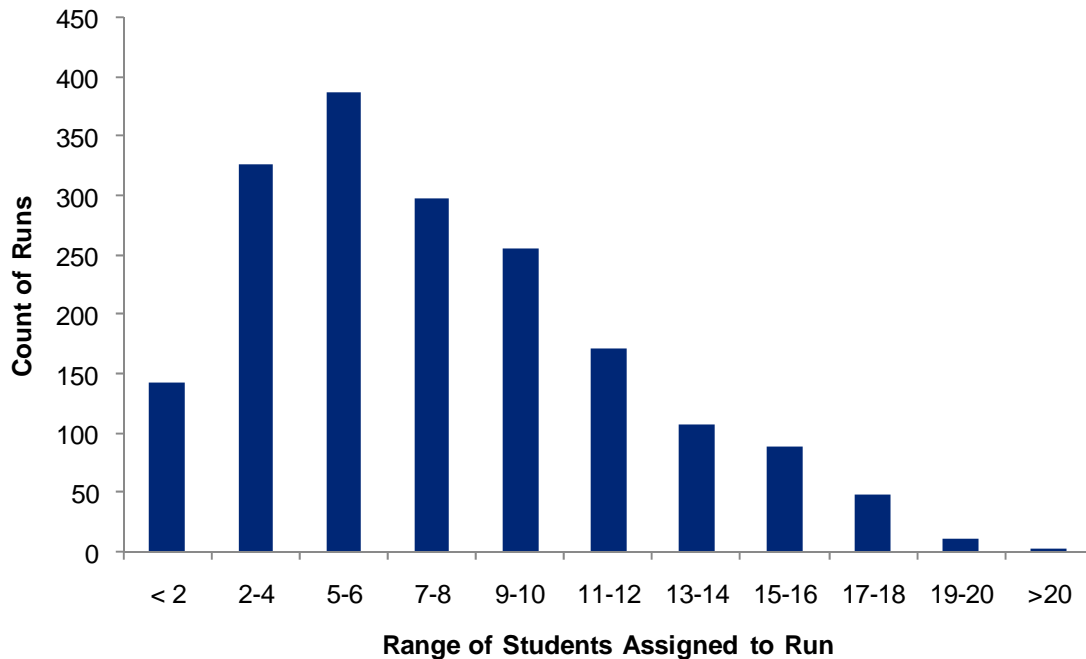
The special needs component of the system operates as a largely separate transportation network, although there are some examples of regular students riding on special needs buses (such as siblings of special needs students) and special needs students riding on regular buses, when their exceptionalities permit this mainstreaming. These are largely exceptions, however, and represent a small percentage of all students. Special needs transportation is generally provided on small 19 passenger school vehicles. 1,803 of 1,840 daily special needs bus runs are identified in *EduLog* as being operated by this capacity vehicle type.

Unlike with the regular transportation component, route planning is fully integrated between the two School Boards. The placement of students at multiple center-based programs throughout the service area, the numerous unique program bell times, and the many unique circumstances and requirements of

the students themselves facilitates a much higher degree of sharing on the individual bus runs. A heavy reliance is placed on the use of combination runs in this component of the system, with 1,581 of 1,840 runs (86 percent) serving more than one school or program. Many of these runs serve schools or programs of both Boards.

Average capacity utilization across all morning, midday, and afternoon special needs bus runs is 40 percent. Given that these services are provided on relatively high capacity vehicles (for special needs), this is an excellent result. Figure 12 shows that most special needs runs have between four and ten students assigned, with a relatively small number below or above this range.

**Figure 12: Special needs transportation capacity utilization (runs by assigned load)**



### 5.5.2 Recommendations

#### 5.5.2.1 Further analyze the regular transportation system for possible efficiencies

The TTG improved overall efficiency when the joint operations were first initiated by implementing a bell time coordination strategy together with the sharing of buses between Boards on daily routes. An examination of the data indicates a reasonable level of efficiency, but also illustrates that further gains are possible in the areas of asset and capacity utilization without dramatically curtailing service quality or service effectiveness. The TTG should consider undertaking an analysis to evaluate the costs and benefits of further system-wide bell time coordination while also examining individual bus runs for possible consolidation.

### 5.6 Results of E&E Review

Routing and technology has been rated as **Moderate-High**. Most of the systems and processes are in place to successfully manage the development and maintenance of effective and efficient bus routes and schedules. Many of the operating practices in use have evolved to address circumstances that are truly unique to the operating environment of the TTG, and the analysis of system effectiveness indicates that a reasonable level of efficiency has been achieved while delivering an exceptional level of service quality. This does not diminish the opportunity for further improvements to both processes and results that may be possible with further analysis by TTG staff and cooperation between the School Boards.

## 6 Contracts

### 6.1 Introduction

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

- Contract structure;
- Goods and services procurement; and
- Contract management.

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

Contracts – E&E Rating:

High

### 6.2 Contract Structure

An effective contract<sup>8</sup> 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.

#### 6.2.1 Observations

##### 6.2.1.1 Bus operator contract clauses

There are executed contracts with all bus operators. While the contracts are standardized, each School Board has individually signed contracts with each of the bus operators (all operators service both Boards).

The contracts are valid from September 1, 2007 to August 31, 2012, with two one-year renewals that will automatically extend the term unless the School Board(s) choose not to extend the term.

The contracts outline appropriate legal, safety and other non-monetary terms, including:

- The nature of the transportation services to be provided, including the number of vehicles that will need to be used, the size of the vehicles, and other aspects of the services to be provided;
- The term of the contract and the conditions under which the School Board can terminate and/or alter the contract;
- Fee structures, payment schedules, and other invoicing / payment provisions such as fuel escalation;
- The operator's performance requirements and the School Board's right to verify contract compliance;

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<sup>8</sup> 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.

- Performance requirements address: routes, transportation services and rates, pickups / drop-offs, travel time, school year, student lists, transportation requirements, administration, vehicle requirements, driver qualifications and responsibilities, wheelchair service, developmental delayed service, first aid training, and safety requirements.
- All drivers are expected to be trained in school bus safety programs – new drivers have two weeks to receive initial training (which includes first aid and EpiPen training), and experienced drivers get annual refreshers on EpiPen training.
- All operators are expected to perform an evacuation drill with students on their “to school” trip by the end of October, and to work with each school to identify the best time to conduct these drills.
- The use of personal information and compliance with applicable legislation (e.g., PIPEDA), as well as confidentiality and privacy provisions;
- The School Board’s right to determine route design, pickup locations, and drop-off locations;
- Vehicle requirements (e.g., maximum age of 12 years, average fleet age of 7 years, etc);
- Driver requirements (e.g., licensing and insurance requirements, vulnerable sector checks, etc);
- Driving requirements (e.g., speed limits, parking provisions, how vehicles should be reversed, etc);
- Assignment and subcontract rights, including the requirement that the operator seek the Board’s written consent prior to assigning the contract and that every subcontract entered into by the operator must adopt all of the terms and conditions of the contract, as applicable to the subcontractor’s work;
- Other provisions, including: operator representation and warranties; indemnification and insurance requirements; worker’s compensation and health and safety, audit and bookkeeping requirements; administration requirements; incident reporting; and dispute resolution, amongst others.

The executed contracts also contain a “Healthy School Bus Plan.” This plan is intended to address concerns with respect to children’s exposure to vehicle exhaust, allergens, and other chemicals associated with the use of school buses. Among other things, the requirements address:

- Fleet deployment (80% of operator vehicles are to be deployed on the basis of route length, with newer vehicles assigned to the longest routes and older vehicles assigned to the shortest routes);
- Conditions inside the bus (e.g., cleanliness levels, eating policies, etc);
- Bus maintenance;
- Idling practices (e.g., follow the City of Toronto’s idling by-laws, minimize idling, etc);
- Fuel technologies;
- Bus equipment; and
- Board practices that will encourage healthy alternatives to school bus transportation.

The executed contracts detail the School Board’s right to reallocate routes or to allocate new routes, but do not explicitly state how the School Board would reallocate routes or allocate new routes. Reallocation of existing routes and allocation of new routes are primarily based on level of service issues, as determined by KPI analysis, input from operational staff, and feedback from schools and principals.

### **6.2.1.2 Bus operator compensation**

Bus operator compensation is based upon:

- A per diem rate, which varies according to the size of the vehicle and time of day (i.e., morning, afternoon, noon, etc);
- A variable rate, is utilized if a route exceeds the standard per diem time for the route; and
- A fuel compensation factor that is determined using a fixed fuel rate, monthly kilometers, and a fuel efficiency factor that varies according to the size of the vehicle.

- For bus operators transporting wheelchair students, a fixed fee per student is paid – this covers costs associated with routing and transporting these students.

For cancellations arising from inclement weather and/or School Board labour disputes, the operators receive 70% of the per diem rate conditional upon paying their drivers their full normal per diem wages. This will be honoured for 15 days, after which the Board may reduce or stop continued payments.

#### **6.2.1.3 Taxi operator contract clauses**

While the School Boards do not directly contract with taxi operators, some of its bus operators ask or are requested to subcontract to taxis companies – these taxi operators must abide by the same terms and conditions of the bus operator contracts discussed above.

The School Boards' procurement departments have also set up a Vendor of Record for taxis. When the transportation departments need taxis on an ad-hoc basis, they use their School Boards' preferred taxi vendors.

#### **6.2.1.4 Parent drivers**

Neither of the two School Boards use parent drivers.

#### **6.2.1.5 Public transit operator contract clauses**

Both School Boards' transportation departments provide eligible students with public transit tickets where it is deemed to be more cost-effective or where it is required by School Board policy. However, the cost-benefit analyses are not regularly reviewed to ensure that cost-benefit analyses conducted in the past to justify public transit use are still valid.

The TDSB's transportation department orders the transit tickets for special needs students through the School Board's procurement system. Individual schools order the transit tickets for regular needs students and are then reimbursed annually by the transportation department. There is no formal contract between the TDSB and the TTC.

The TCDSB's transportation department orders and distributes transit tickets for all eligible students; it has a volume discount and there is a normal, executed consignment agreement in place with the TTC.

### **6.2.2 Best Practices**

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

#### **Standard contracts and contract clauses**

The transportation departments have standard contracts in place for operators that outline appropriate legal, safety and other non-monetary terms. This ensures the contractual relationship between transportation service providers and the School Board is defined and enforceable. Bus contract wording automatically extends the contract into the next year based on the terms and conditions from the previous year. This ensures that a contract is in place at the start of the school year.

#### **Vehicle age**

The transportation departments' requirements for maximum and average vehicle ages are aligned with the provincial best practices.

#### **Insurance**

The transportation departments require operators to provide proof of insurance prior to the start of the school year. This ensures that this important legal requirement is met prior to providing any services.

#### **Environmentally-friendly practices**

The executed contracts include a section tailored to address health and environmental concerns. This section prescribes environmentally-friendly requirements such as fleet deployment practices, anti-idling policies, and bus cleanliness standards, amongst others. These requirements help address concerns raised by parents and health professionals, while allowing the Boards to pursue sustainable business practices and to display environmental leadership.

### 6.2.3 Recommendations

#### 6.2.3.1 Mandate that safety training be provided prior to the start of the school year

It is recognized that all drivers are to be trained in school bus safety programs, and that new drivers have two weeks to receive the initial training (which includes first aid and EpiPen training). It is recommended that all drivers be qualified to manage emergency situations before they start transporting students.

### 6.3 Goods and Services Procurement

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

#### 6.3.1 Observations

##### 6.3.1.1 Operator procurement

The transportation departments worked together to develop and issue an RFP for bus operator services, and used competitive procurement to procure all bus operator services.

The transportation departments have also developed a procurement calendar that is used to guide the RFP process and ensure that successful vendors have sufficient time to secure vehicles and drivers.

##### 6.3.1.2 Special needs transportation

As discussed above, the transportation departments used competitive procurement to procure all bus operator services, including special needs transportation.

The transportation departments also rely on the operators to provide routing services for some special needs students, and this requirement was embedded in the RFP for bus operator services.

##### 6.3.1.3 Other procurement

The transportation departments worked together to develop and issue an RFP for the delivery of the student bussing safety programs, including the First Rider program and the Ambassador program. Competitive procurement was used to select an operator to provide these services.

#### 6.3.2 Best Practices

##### Competitive procurement

The transportation departments' current operator contracts were all competitively procured and the transportation departments expect to continue competitively procuring operator contracts. Competitive procurement processes are recognized as the best means to ensure market rate pricing as they allow the purchaser to obtain the best value for money given a defined set of service expectations. The use of a competitive procurement process introduces the business opportunity to a competitive market. Based on the operator's submission, the transportation departments are able to identify the most qualified transportation service operators that offer the best prices for the level of services provided. The School Boards' transportation departments should be commended for their strong and historical commitment to competitive procurement of transportation services.

##### Procurement calendar

The transportation departments have a governance-approved operator procurement calendar in place which mandates that operator procurement be completed well before the start of the school year. This calendar is also communicated to operators.

### 6.4 Contract Management

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

- Administrative contract compliance to ensure that operators meet the requirements set out in the contract;



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

#### 6.4.1 Observations

The Consortium has recently developed a process to ensure operator compliance with the terms of the operator contracts; the basis for this compliance program is not delineated in the operator contracts.

##### 6.4.1.1 Bus operator administrative, contract compliance, facility and maintenance monitoring

Evaluation forms for bus operator administrative, contract compliance, facility and maintenance monitoring exist and are used to evaluate operators' compliance with administrative requirements, contract provisions, facility performance standards, and maintenance requirements.

The evaluation form addresses operations, planning, safety, technology, communication, and financial / accounting criteria; the evaluator is also required to review documents such as the commercial vehicle operator record, driver and vehicle records, safety records, and evidence of compliance with "green" requirements, amongst other requirements.

These audits are conducted annually by supervisory staff, with weekly reviews of the operator KPIs that were detailed in Section 3.5.1.11 **Error! Reference source not found.** The operators are provided with notice that the transportation departments will be visiting to conduct the annual audit in order to ensure the availability of operator staff. Issues are documented and communicated back to the operators, and the transportation departments will work with operators to ensure that issues are appropriately addressed (e.g., development of a five-step plan to ensure that an operator with performance issues is able to meet the required performance standards). The policies associated with conducting these audits are not formally codified.

##### 6.4.1.2 Operator safety and service monitoring

The transportation departments evaluate operator safety through its annual operator audits, which include reviewing the operators' internal route audit documentation. Operator service levels are also monitored through the weekly review of operators' KPIs, as discussed in Section 3.5.1.11.

The transportation departments conduct route audits annually, but this process is not codified and there are no guidelines on how regularly such route audits should be conducted. In addition, while some of these route audits are conducted on a random basis, for the most part, the route audits conducted by the transportation departments are typically in response to an issue (e.g., complaints are received, survey results indicate potential issues, etc).

##### 6.4.1.3 Performance monitoring

The transportation departments conduct regular surveys by querying schools on service levels, customer service, etc – for both operator and transportation departments performance. Results are tracked year over year, and are reviewed by the transportation operations managers to identify areas for improvement.

The transportation departments also monitor operator performance through the weekly review of operators' KPI packages, and are empowered by the operator contracts to take corrective actions if certain performance standards are not met (e.g., a penalty if insufficient drivers are available).

#### 6.4.2 Best Practices

##### Operator administrative, contract, facility and maintenance compliance

The transportation departments ensure that the information, facility and vehicle requirements outlined in the operator contracts are verified in a timely manner and tracks the performance of operators over time. Such efforts to ensure operator compliance help the transportation departments measure whether the operators are complying with stated contract clauses and, ultimately, if they are providing safe and reliable service. However, it is recommended that the transportation departments work to document the policies associated with conducting its facility audits.

## Performance monitoring and surveys

The transportation departments conduct regular surveys by querying schools on service levels, customer service. The surveys address both operator and transportation departments' performance, and results are tracked year over year and are regularly reviewed by the transportation managers. This ensures that the level of service being provided by the transportation departments and the operators is consistent and matches key stakeholders' expectations.

### 6.4.3 Recommendations

#### 6.4.3.1 Modify the operator safety and service monitoring process

It is recognized that the transportation departments regularly monitor operator service levels by reviewing operator KPIs on a regular basis and that route audits are conducted. While some route audits are conducted randomly, route audits are generally used in response to an issue (i.e., a complaint). It is recommended that the transportation department move towards conducting random route audits more frequently and strive to audit a fixed percentage of its routes annually. This will allow the transportation departments to gain a clearer view of the service standards maintained by operators on a typical, day-by-day basis and to take a more proactive approach in ensuring operators are providing safe and reliable service. This policy should also be documented appropriately.

### 6.5 Results of E&E Review

The process by which the Consortium negotiates, structures, and manages its contracts for transportation services has been assessed as **High**. Positive elements include the execution of standardized, comprehensive operator contracts through competitive procurement, the implementation of environmentally-friendly practices in operator contracts, and an effective and efficient program to monitor operator contract compliance and operator performance. However, the transportation departments should work towards ensuring that all drivers have appropriate safety training prior to beginning their routes and that random route audits are conducted on a more regular basis.

## 7 Funding Adjustment

The Ministry has asked the E&E Review Team to apply their Funding Adjustment Formula to each Board that was subject to an E&E Review in Phase 4. Note that where Boards are incurring transportation expenses in multiple Consortium sites, the Board’s adjustment will be prorated for the portion attributed to the consortium under review. For example, if 90% of Board A’s expenditures are attributed to consortium A, and 10% of expenditures are attributed to consortium B, the funding adjustment resulting from consortium A’s review will be applied to 90% of Board A’s deficit or surplus position.

The Ministry’s funding formula is as follows:

**Table 7: Funding Adjustment Formula**

Overall Rating	Effect on deficit Board <sup>9</sup>	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:

### Toronto Catholic District School Board

Item	
2009-2010 Transportation Surplus (Deficit)	(\$2,660,085)
% of Surplus (Deficit) attributed to the Consortium	100%
Revised amount to be assessed under the Consortium	(\$2,660,085)
E&E Rating	Moderate
Funding Adjustment based on Ministry’s Funding Adjustment Formula	60%
2010-2011 Total Funding adjustment	\$1,596,051

### Toronto District School Board

Item	
2009-2010 Transportation Surplus (Deficit)	\$ 811,916
% of Surplus (Deficit) attributed to the Consortium	100%
Revised amount to be assessed under the Consortium	\$811,916
E&E Rating	Moderate
Funding Adjustment based on Ministry’s Funding Adjustment Formula	No adjustment
2010-2011 Total Funding adjustment	No adjustment

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

<sup>9</sup> This refers to Boards that have a deficit/surplus on student transportation

## 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
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 TTG	Toronto Transportation Group
Deloitte	Deloitte & Touche LLP (Canada)
Driver	Refers to bus Drivers, see also operators
E&E	Effectiveness and Efficiency
E&E Review Team	As defined in Section 1.1.5
E&E Reviews	As defined in Section 1.1.4
Effective	Having an intended or expected effect; the ability to deliver intended service
Efficient	Performing or functioning in the best possible manner with the least waste of time and effort; the ability to achieve cost savings without compromising safety
Evaluation Framework	The document, titled “Evaluation Framework for Toronto Transportation Group” which supports the E&E Review Team’s Assessment; this document is not a public document
Funding Adjustment Formula	As described in Section 1.3.5
HR	Human Resources
IT	Information Technology
JK/SK	Junior Kindergarten/Senior Kindergarten
KPI	Key Performance Indicators
Management Consultants	As defined in Section 1.1.5
Memo	Memorandum 2006: SB13, dated July 11 issued by the Ministry
Ministry	The Ministry of Education of Ontario
MPS	Management Partnership Services Inc., the routing consultant, as defined in Section 1.1.5
MTO	The Ministry of Transportation of Ontario

operators	Refers to companies that operate school buses, boats or taxis and the individuals who run those companies. In some instances, an operator may also be a Driver.
Overall Rating	As Defined in Section 3.2 of the Evaluation Framework
Member Boards, School Boards or Boards	The school boards that have participated as full partners or members in the Consortium; the TCDSB and the TDSB
Rating	The E&E Assessment score on a scale of High to Low, see Section 1.3.4
Report	The report prepared by the E&E Review Team for each Consortium that has undergone an E&E Review (i.e. this document)
Separate Legal Entity	Incorporation
Type A school bus	A smaller asset, typically with a 20 passenger capacity, oftentimes used to transport special needs students
TCDSB	Toronto Catholic District School Board
TDSB	Toronto District School Board

## Appendix 2: Financial Review – by School Board

### Toronto Catholic District School Board

Item	2006-2007	2007-2008	2008-2009	2009-2010 <sup>9</sup>	2010-2011 <sup>10</sup>
Allocation <sup>11</sup>	\$19,658,105	\$20,034,471,	\$20,693,598	\$20,914,149	\$20,925,650
Expenditure <sup>12</sup>	\$21,078,954	\$22,221,932	\$23,195,154	\$23,574,234	\$25,235,829
Transportation Surplus (Deficit)	(\$1,420,849)	(\$2,187,461)	(\$2,501,556)	(\$2,660,085)	(\$4,310,179)

### Toronto District School Board

Item	2006-2007	2007-2008	2008-2009	2009-2010 <sup>10</sup>	2010-2011 <sup>11</sup>
Allocation <sup>12</sup>	\$46,226,510	\$47,282,866	\$48,753,019	\$48,243,771	\$47,650,600
Expenditure <sup>13</sup>	\$41,945,280	\$42,638,051	\$46,200,094	\$47,431,855	\$50,333,357
Transportation Surplus (Deficit)	\$4,281,230	\$4,644,815	\$2,552,925	\$811,916	(\$2,682,757)

<sup>10</sup> 2009-2010 allocations and expenditures based on Ministry data – Financials for 2009-2010

<sup>11</sup> 2010-2011 allocations and expenditures based on Ministry data – Revised Estimates for 2010-2011

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

<sup>13</sup> Expenditure based on Ministry data - taken from Data Form D:730C (Adjusted expenditures for compliance) - 212C (Other Revenues) + Schedule 10:620C (Transportation Amortization)

## Appendix 3: Document List

1. AA 10 Ministry Survey.pdf
2. AA 11 Road Restrictions.PDF
3. AA 12 Traffic Volume.pdf
4. AA 13 Toronto Road construction.pdf
5. AA 14 2006\_ethnic\_origin\_visible\_minorities\_backgrounder.pdf
6. AA 15 2006\_income\_and\_shelter\_costs\_briefingnote.pdf
7. AA 15 2006\_lang\_imm\_citizenship\_mobility\_backgrounder.pdf
8. AA 16 2006\_population\_and\_dwelling\_count\_backgrounder.pdf
9. AA 17 2006\_aboriginal\_identity\_backgrounder.pdf
10. AA 18 Religious Holy Days 2010-2011.pdf
11. AA 19 Toronto Crossroads Report.pdf
12. AA 2 Budget Workflow.PDF
13. AA 20 Variety Village annual\_report\_2009.pdf
14. AA 21 Languages.PDF
15. AA 22 Student Transportation Timeline.xls
16. AA 23 TTC Removal at Secondary Level.pdf
17. AA 24 Toronto Student Transportation Services - 2010.pdf
18. AA 25 - General Agreement for Cotermious Route Planning Between TCDSB & TDSB.pdf
19. AA 29 Minutes of Transportation Meeting April 20, 2010.doc
20. AA 29 Minutes of Transportation Meeting Nov 16, 2010.doc
21. AA 29 Minutes of Transportation Meeting November 2010 Management.doc
22. AA 29 Minutes of Transportation Meeting October 26th, 2009.doc
23. AA 3 Data Workflow.PDF
24. AA 30 TTC Contract.pdf
25. AA 31 Subcontract Letters with Taxi Operators.pdf
26. AA 32 RFP - TAXI 2007.pdf
27. AA 33 Level of Service 2006 Operator.PDF
28. AA 33 Level of Service 2006 STS.PDF
29. AA 33 Level Of Service 2007 Operator.PDF
30. AA 33 Level of Service 2007 STS.PDF
31. AA 33 Level Of Service 2008 Operator.PDF



32. AA 33 Level of Service 2008 STS.PDF
33. AA 33 Level Of Service 2009 Operator.PDF
34. AA 33 Level of Service 2009 STS.PDF
35. AA 33 Level Of Service 2010 Operator.PDF
36. AA 33 Level of Service 2010 STS.PDF
37. AA 33 Year over Year External Survey Comparisons.xls
38. AA 33 Year over Year Internal Survey Comparisons.xls
39. AA 34 field trip RFP 2009.pdf
40. AA 35 Organization Chart.doc
41. AA 36 Staff Roles &Responsibilities Dec 2010 (2).pdf
42. AA 36 Staff Roles &Responsibilities Dec 2010.pdf
43. AA 37 TTG Unincorporated December 2010.doc
44. AA 38 Reasons for increase bussing (TC) 2010.pdf
45. AA 39 Interlock Systems (TRACS) - Service, Licence and Support Agreement - Feb 16 2004.pdf
46. AA 4 Incident Reporting Workflow.pdf
47. AA 40 Safety Program Submission.pdf
48. AA 41 Toronto Edulog, ON.pdf
49. AA 41 Toronto Public, ON.pdf
50. AA 42 TCDSB letter re safety officer costs.doc
51. AA 43 Agenda - Coterminous Transportation June 1,2007.doc
52. AA 43 Agenda - Coterminous Transportation June 20 2005.doc
53. AA 43 Agenda - Coterminous Transportation.doc
54. AA 43 Minutes of Coterminous Transportation Meeting June 30th, 2005.doc
55. AA 43 Minutes of Coterminous Transportation Meeting May3rd, 2005.doc
56. AA 44 Manual Chapter 1.pdf
57. AA 44 Manual Chapter 10.pdf
58. AA 44 Manual Chapter 11.pdf
59. AA 44 Manual Chapter 12.pdf
60. AA 44 Manual Chapter 13.pdf
61. AA 44 Manual Chapter 14.pdf
62. AA 44 Manual Chapter 15.pdf
63. AA 44 Manual Chapter 16.pdf
64. AA 44 Manual Chapter 17.pdf

65. AA 44 Manual Chapter 18.pdf
66. AA 44 Manual Chapter 19.pdf
67. AA 44 Manual Chapter 19b.pdf
68. AA 44 Manual Chapter 19c.pdf
69. AA 44 Manual Chapter 2.pdf
70. AA 44 Manual Chapter 3.pdf
71. AA 44 Manual Chapter 4.pdf
72. AA 44 Manual Chapter 5.pdf
73. AA 44 Manual Chapter 6.pdf
74. AA 44 Manual Chapter 7.pdf
75. AA 44 Manual Chapter 8.pdf
76. AA 44 Manual Chapter 9.pdf
77. AA 5 Route Audit.pdf
78. AA 6 School Profiles.xls
79. AA 7 System-wide Transported\_Programmes\_All\_Schls\_June\_07\_Cost.xls
80. AA 8 Healthy School Bus Plan- Final.PDF
81. AA 9 Student Transportation Services Resource Manual 2010.pdf
82. AA1 Bell Time Workflow.PDF
83. AA27 Toronto Transportation Group Scan.doc
84. AA28 E&E Review - TTG presentation.PDF
85. C 1 A 1056405\_2\_Student Transportation Agreement - FINAL - STOCK.pdf
86. C 10 Costs-Fleet Drivers-October 2010.xls
87. C 11 Joint RFP for Student Bussing Safety Program.doc
88. C 12 Angelo Goal and Objectives Sept 14 2010.doc
89. C 13 Route Audits - Memo.pdf
90. C 14 09-10 Minutes Staff Meeting Jan20-10.doc
91. C 14 09-10 Minutes Staff Meeting Mar31-10.doc
92. C 14 09-10 Minutes Staff Meeting May26-10.doc
93. C 14 09-10 Minutes Staff Meeting Oct21-09.doc
94. C 14 10-11 Minutes Staff Meeting Nov17-10.doc
95. C 14 10-11 Minutes Staff Meeting Oct20-10.doc
96. C 1b Contract Signature Sheets.pdf
97. C 2 TTG Special Needs Manual.doc

98. C 3a Contracted Operators.pdf
99. C 3b Student Transportation Services Agreement \_FINAL Template.PDF
100. C 3c Signature sheet TTC.pdf
101. C 5 Contracted Fleet Info.xls
102. C 6a TTC Eligibility.pdf
103. C 6b eligibility policy via mode.pdf
104. C 7 C Communication.docx
105. C 7b Collection of Operator Information.pdf
106. C 8 A Toronto Transportation Group Procurement Calendar.doc
107. C 8 B Transportation RFP Final November 22.doc
108. C 8c RFP Correspondance.pdf
109. C 9 a-f Audit Function.pdf
110. C 9 F KPI Weekly Status Template1011.xls
111. C 9b Operator Audit Forms.pdf
112. C 9e Documented route audits.pdf
113. C 9g Communication with Operator regarding performance.pdf
114. CM 10a STRATEGIC PLAN TEMPLATE.doc
115. CM 10b Toronto Transportation Group Goals & Objectives.doc
116. CM 10c Evidence of tracked objectives.pdf
117. CM 11a KPI Process.doc
118. CM 11b TTG KPI Weekly Status Template1011.xls
119. CM 11c Brief - Transportation Level of Service.pdf
120. CM 11c Metrics for stakeholders.pdf
121. CM 11d Evidence of changed metrics.PDF
122. CM 12a FOI Info and process.pdf
123. CM 12c evidence of FOI review.pdf
124. CM 12e Driver Confidentiality Agreements.pdf
125. CM 12f Staff Confidentiality.pdf
126. CM 13a Budget Estimates timeline.pdf
127. CM 13b Budget Allocation Formula.pdf
128. CM 13C Expenditure Summary - 1st Qtr (30Nov09).pdf
129. CM 13d Board Rpt - 1st Qtrly Rpt (3Mar10).pdf
130. CM 13d Board Rpt - 2nd Qtrly Rpt (24Mar10).pdf

131. CM 13d Board Rpt - 3rd Qtrly Rpt (16Jun10).pdf
132. CM 13e TRANSPORTATION BUDGET 0708 0809 Comparison Budget Control.pdf
133. CM 14b Financial Statement TCDSB\_08-09.pdf
134. CM 14c Purchasing Procedures - SCG 2010.Version 11.pdf
135. CM 14d Budget Impact Initiative (Blank Form) (Version Excel 97-2003).pdf
136. CM 14f Sample Billing proof verify.pdf
137. CM 1a TTG Unincorporated October 2010.docx
138. CM 2a Consortium Reporting Structure.pdf
139. CM 3A1 TTG Organizational Chart Oct 2010 - Stage I 85x11.doc
140. CM 3a2 TTG Organizational Chart Oct 2010 - Stage IIColour 85x11.docx
141. CM 3b Transportation Roles &Responsibilities.doc
142. CM 7a Insurance reviewed.pdf
143. CM 7b Confirmation of Coverage Certificate 2010.pdf
144. CM 7B1Insurance.pdf
145. CM 8 Purchasing Policy TCDSB.PDF
146. CM 8 Purchasing Policy TDSB.PDF
147. CM 9b Final - Performance Mgmt Process - SII Levels 1-6 (updated Sept 2008).pdf
148. CM 9b Final - Performance Mgmt Process - SII Levels 7-12 (updated Sept 2008).pdf
149. CM 9c JB TTG STAFF PROGRAMS LIST.xls
150. CM 9c Toronto Transportation Group Staff Training and Improvement.doc
151. CM 9d JB Staff PD Scheduling.xls
152. CM 9e Succession Plans.pdf
153. CM 9f evidence of goals and performance related to staff.pdf
154. PP 1 Hazard Criteria.doc
155. PP 1 Issues with Harmonization of Policies in Toronto with maps.doc
156. PP 1 TTG Policy Operation Manual.doc
157. PP 10 License plates 2010-2011.xls
158. PP 11 Bus Stop Check List (2).doc
159. PP 11.doc
160. PP 2 Transportation Timelines.xls
161. PP 3 Student Transportation Services - Standard Operating Procedures TTG update.doc
162. PP 4 TRACS Benchmark Reports.PDF
163. PP 5 Purple equals Parents Program TTG Oct 2010.pdf

- 164. PP 5 Safety Programs.pdf
- 165. PP 6 School Bus Safety Programs and Orientation.doc
- 166. PP 8 Specialized Programs.pdf
- 167. PP 9 No Early Dismissal Communication.doc
- 168. R T4 Confirming Bell Times for Students.doc
- 169. R T4 Notes for SPED Data Inputting.doc
- 170. R T4 Notes to Add a Bell Time.doc
- 171. R T4 Notes to Delete a Bell Time.doc
- 172. R T4 Procedures to Edit bell time.doc
- 173. R T4 TCNS procedure.doc
- 174. R T4 TCNS Recipient.doc
- 175. RE Observations.msg
- 176. RT 1 Bell Time Stratification Summary.xlsx
- 177. RT 1 TTG Coding Structure.doc
- 178. RT 1 TTG Disaster Recovery.docx
- 179. RT 10 Capital Program - Relocation costs - October 2009.xls
- 180. Rt 11 Student Travel-Safety Assistant-Job Ad.doc
- 181. RT 2 Data Workflow.PDF
- 182. RT 3 Toronto Catholic District L&M.doc
- 183. RT 3 Web Communication Solutions (execution copy - Interlock)may 1, 2004.doc
- 184. RT 4 Edulog.nt Run Optimization Guide.pdf
- 185. RT 4 Elementary\_Schools\_Student\_Demographics\_User\_Manual\_\_Feb\_.pdf
- 186. RT 4 ELT Overview.pdf
- 187. RT 4 Geoprocessing\_Quick\_Guide.pdf
- 188. RT 4 Gismo Boundary Planning.pdf
- 189. RT 4 SAP FINAL PROC BKLT.docx
- 190. RT 4 SAP QUICK REFERENCE CARD.pdf
- 191. RT 4 TCNS Procedure - Version3.docx
- 192. RT 4 Transportation Carrier Schedule Services.docx
- 193. RT 4 Transportation Schedule and Ticket Services 2.docx
- 194. RT 4 Welcome to TRACS.pdf
- 195. RT 4 What\_is\_ArcGIS.pdf
- 196. RT 5 Supplemental Technology.pdf

- 197. RT 5 Symposium.doc
- 198. RT 6 ridetime.xls
- 199. RT 7 Regualr Reporting to Board.xls
- 200. RT 8 Sped on Big Bus.xls
- 201. RT 9 HS Scenario.xls

## Appendix 4: Common Practices

			Elementary	Secondary
		JK/SK	Gr. 1 – 8	GR. 9 – 12
<b>Home to School Distance</b>				
	Common Practice	0.8 km	1.2 km	3.2 km
	Policy - TCDSB	1.5	1.5	No Service
	Policy - TDSB	1.6	1.6 1 – 3 3.2 4 – 8	4.8
<b>Home to Bus Stop Distance</b>				
	Common Practice	0.5 km	0.8 km	0.8 km
	Policy - TCDSB	No policy	No policy	No policy
	Policy - TDSB	No policy	No poicy	No policy
<b>Arrival Window</b>				
	Common Practice	18	18	25
	Policy - TCDSB	30	30	30
	Policy - TDSB	30	30	30
<b>Departure Window</b>				
	Common Practice	16	16	18
	Policy - TCDSB	20	20	20
	Policy - TDSB	20	20	20
<b>Earliest Pick Up Time</b>				
	Common Practice	6:30	6:30	6:00
	Policy - TCDSB	[7:22 AM is the earliest pick-up time in the database]		
	Policy - TDSB			
<b>Latest Drop Off Time</b>				
	Common Practice	5:30	5:30	6:00
	Policy - TCDSB	[4:51 PM is the latest drop-off time in the database]		
	Policy - TDSB			
<b>Maximum Ride Time</b>				
	Common Practice	75	75	90
	Procedure - TCDSB	60	60	60
	Procedure - TDSB	75	75	75
<b>Seated Students Per Vehicle</b>				
		JK/SK	Gr. 1 - 6	GR. 9 - 12
	Common Practice	69	69	52
	Procedure - TCDSB	No policy	No Policy	no policy
	Procedure - TDSB	No policy	No policy	No policy





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Membership Agreement

**Toronto Transportation Group**

(hereinafter called the “Consortium”)

THIS AGREEMENT is made as of this 21<sup>st</sup> day of September, 2011

BETWEEN:

TORONTO CATHOLIC DISTRICT SCHOOL BOARD  
(Hereinafter called “TCDSB”)

OF THE FIRST PART

And

TORONTO DISTRICT SCHOOL BOARD  
(Hereinafter called “TDSB”)

OF THE SECOND PART

WHEREAS:

- A. The Parties are each School Boards constituted by and under the authority of the *Education Act of Ontario* who operate schools in the City of Toronto;
- B. Each Board currently provides a service for the transportation of its students;
- C. The Parties desire and agreed that they will participate in some shared services for the transportation of its students with each other to reduce the costs of transportation services;
- D. The Parties have agreed that a common administration of student transportation will increase delivery efficiency and the cost effectiveness of the service for each Board;
- E. The Ministry of Education requires the establishment of consortiums involving all coterminous boards.

NOW THEREFORE THIS AGREEMENT WITNESSES that in consideration of the mutual covenants and agreements contained herein, the Parties agree with each other as follows:

## **1. Definitions:**

In this Agreement, unless there is something in the subject matter or context inconsistent therewith, the following terms shall have the following respective meanings:

- a. “Boards” means the Boards which are Parties to this Agreement, being TCDSB and TDSB;
- b. “Consortium” means the two Boards acting together through the central administration referred to and to be called “Toronto Transportation Group”, or a variation thereof;
- c. “Operations Committee” means the management team established and constituted by the Boards for the operational management of the Consortium as set out in Schedule ‘B’ of this Agreement;
- d. “Governance Committee” means the individuals that compose the governing body for the Consortium as set out in Schedule ‘C’ of this agreement.
- e. “Schedule of Costs” means the operating costs for each route as allocated by a Board described as its share of the overall fleet as set out on Schedule “A” to this Agreement;
- f. “Services” means the agreement(s) for services for transportation of students;
- g. “Transportation Staff” means the person or persons employed by or contracted to the respective Boards which are Parties to this Agreement.

## **2. Purpose:**

The Boards hereby agree that they will collectively provide a common administration for transportation service for students registered in their respective Boards. For purposes of clarification, the Consortium will manage and administer all home to school transportation (including late buses), school to school transportation, and special needs transportation. Charter transportation for school based activities will not be administered by the Consortium. These activities will be managed by General Manager following the respective Board’s policies and procedures.

- 2.1 The Boards shall sign all such documents and do all such things as may be necessary or desirable to more completely and effectively carry out the terms and intention of this Agreement.
- 2.2 The operation by the Consortium of the transportation service shall be carried on under the name of the Consortium, which shall be “Toronto Transportation Group”, or a variation thereof.
- 2.3 The Boards shall enter into common contracts with transportation service providers.
- 2.4 The Parties agree that ownership of “Toronto Transportation Group”, or a variation thereof” shall remain vested with the two Boards, TCDSB and TDSB.
- 2.5 Governance Committee
  - 2.5.1 The Boards agree and acknowledge that the Consortium Governance Committee will consist of a senior business official from each Board and a trustee from each Board.
  - 2.5.2 The roles and responsibilities of the Governance Committee are contained in Schedule ‘C’ attached to and forming part of this Agreement.
- 2.6 Operations Committee
  - 2.6.1 The Boards agree and acknowledge that the Consortium Operations Committee will consist of the supervisory officer responsible for transportation matters from each Board along with the general manager of the Consortium.
  - 2.6.2 The roles and responsibilities of the Operations Committee are contained in Schedule “B” attached to and forming part of this Agreement.

### **3. Management:**

- 3.1 The Operations Committee of the Consortium shall be governed by the principles enumerated in this Agreement including Schedules “A”, “B”, and “C” attached to and forming part of this Agreement.
- 3.2 The existing Transportation Staff of each Board shall remain employed by their respective Board. The Parties agree that each employee shall maintain all rights and privileges within their respective collective agreements if applicable, and shall perform services for the Consortium under the ultimate direction of the General Manager.

#### **4. Human Resources**

- 4.1 The day to day operations of the Consortium shall be overseen by the General Manager who is selected based on criteria set out by the Governance Committee to fulfil the transportation needs of the Boards. The General Manager shall be delegated authority to enter into transportation related contracts on behalf of the Boards.
- 4.2 Along with the position of General Manager, the positions of Operations Manager and Technology & Planning Manager will be created to provide services exclusively to the Consortium. The base salary of these positions will be based on TDSB job evaluations and associated salary rates. Both Boards agree to pay 50% of all the costs associated with the base salary and benefits of these three positions. Other than salary, all terms and conditions of employment for each of these three positions will be consistent with the policies, procedures and practices of the Board with which the employee remains employed.
- 4.3 No additional new positions are to be created at this time and the consortium shall be staffed by current members of the two Transportation Departments from each Board. All positions serving the Consortium shall continue to be held and staffed by employees of their respective Board. Discussions will be held with appropriate union officials when necessary regarding the Consortium organization including reporting structures.
- 4.4 Other than items set out in 4.2 above, each Board will be responsible for all employment costs associated with their staff who will be servicing the Consortium, unless otherwise mutually agreed and described in a separate service agreement. All unionized staff will continue to report to a Board employee serving the consortium on behalf of their respective Board. An organizational chart that outlines the positions and corresponding Board affiliation is attached as Schedule D.
- 4.5 All unionized positions will follow current job posting protocols as per their respective collective agreements.

#### **5. Administration of Finances:**

- 5.1 The Boards agree that the administration costs of the operation of the Consortium will be borne by each Board for its respective employees. This will include, but is not limited to, computers, office supplies and furniture, network and phone equipment.

- 5.2 The Board in whose premises the Consortium offices are located agrees to pay all real estate related and facility maintenance costs associated with the operation of the Consortium.
- 5.3 Should the Consortium relocate to a non Board facility, real estate and related and facility maintenance costs associated with the operation of the Consortium will be shared based on the number of students registered in each Board. This value will be calculated on October 31<sup>st</sup> of each year and costs will be invoiced starting November 1<sup>st</sup> of that same year.
- 5.4 All costs associated with transportation staff members who are not part of the Consortium or referenced in a separate service agreement, but are shared between the Boards will have all their costs equally split between the Boards.
- 5.5 Any administrative expenses not detailed in this section or outlined in a separate service agreement will be shared between the Boards based on the number of students registered in each Board.

## **6. Operations:**

- 6.1 The allocation of routes that each Board is responsible to fund is determined through a route optimization. The Boards will route all their students separately first to ascertain the number of vehicles that are required to transport the students of each Board. A second optimization combining the students from each Board will generate a savings that each member Board will equally share. The number of routes to be funded is equal to the number of buses in the original optimization minus the number of shared buses saved in the second optimization. Details of this cost methodology are located in Schedule “A” attached.
- 6.2 The route optimizations will be generated every four years to ensure that any changes to policy or programming are accurately reflected in the allocation of buses for each Board.
- 6.3 During the interim all changes to the number of buses will be attributed to the Board that is determined to have triggered the change. Transportation planning staff will provide their analysis on this change to the Operations Committee and the Operations Committee will determine the distribution of routes for each board.
- 6.4 Each of the Boards shall be responsible for developing and maintaining its own student database and shall provide student database information in a timely fashion to the Consortium.

- 6.5 Each Board agrees that it shall provide its share of the funding for the administration and operating costs of the Consortium in a timely fashion, and as indicated on Schedule “A” attached.

## **7. Existing Board Policies Reserved:**

- 7.1 The respective Boards acknowledge the value of having a common transportation policy, which they agree to work toward where appropriate. The Consortium shall take its direction from existing Board policies in the operation of the management of transportation services.
- 7.2 In the event that either Board shall change its current policies, which may be of significance to the ongoing operations of the Consortium, the Board shall consult with the other Board and shall notify the Operations Committee of the proposed changes providing sufficient notice to implement those changes.
- 7.3 If a change in a member Board’s policy is identified by the Consortium Operations Committee as having adverse financial or operating implications, the Board adopting the policy change shall be solely responsible for the increased costs and liability associated with the change. Similarly, if a change of a Board’s policy decreases the cost of transportation, and that change is the sole reason for the decrease, then that Board will be credited with the savings.
- 7.4 As part of this Agreement, each Board shall provide to the Consortium its current bell times when pupils are allowed to enter the school building for classes and when pupils are expected to leave the school building after the end of classes.

The Consortium will plan its routes based on the most efficient and effective use of resources. Where changes are required for schools for either or both Boards, the Consortium will be required to provide a transportation impact study to be completed by the Consortium. The impact study will include a review of any incremental student supervision costs and savings in transportation costs.

## **8. Insurance**

- 8.1 The Boards shall agree to provide and maintain sufficient liability and all perils coverage as if they were operating separately, and which shall be determined by the present insurance provider, the Ontario School Board Insurance Exchange.

## **9. Term and Early Termination**

- 9.1 This Agreement shall be effective as of the 1st day of December, 2010, and shall continue in full force and effect until the 31st day of August, 2011 (the “Term”),



unless sooner terminated as hereinafter set out. After the 31st day of August, 2011, this Agreement will be renewed on an annual basis unless either Board expresses, in writing, its intent to terminate the Agreement after said anniversary date. Notice of such intent to terminate must be given to the other Board by the Board wishing to terminate at least one hundred and eighty (180) days prior to the next August 31 anniversary date.

- 9.2 The Boards acknowledge and agree that subject to the provisions of Section 11.0 Dispute Resolution and notwithstanding the foregoing, either Board shall be entitled to terminate this Agreement in the event of a breach of any provision of this Agreement by the other Board, which breach is not remedied within thirty (30) days of written notice thereof. In the event of any such termination, an accounting of any outstanding financial transactions shall be affected to the effective date of termination.

## **10. Amalgamation:**

- 10.1 In the event that either of the Boards which are party to this Agreement is by law, policy or are by direction of a competent government authority having jurisdiction, required to amalgamate or combine with the other Board or a board not a Party to this Agreement, the member Boards as presently constituted hereby agree to meet to determine the impact of such change on the continuation of the Consortium. In the absence of unanimous consent, this Agreement shall be deemed to be terminated and shall be of no further force or effect, except for any provisions which are expressly stated to survive termination of this Agreement.

## **11. Dispute Resolution:**

- 11.1 Any disputes concerning the operations of the Consortium will first go to the General Manager to resolve. Should the dispute still not be resolved, the matter will be referred to the Senior Administrators responsible for transportation at their respective Board within the Operations Committee. Should the dispute still not be resolved it will be referred to the Director of Education for each Board.
- 11.2 Should the Parties not be able to resolve the matter, then all differences or disputes which arise between the Parties in relation to the interpretation of this Agreement or to any act or omission of any party to the dispute or to any act which ought to be done by the Parties in dispute or in relation to any other matter whatsoever touching the terms and conditions of this Agreement shall be referred to a mediator jointly selected by the Parties. Such mediation to take place within 30 days of the referral unless such period is extended by consent of both Parties. If such mediation is unsuccessful, the matter will be referred to a single arbitrator to be agreed upon by the Parties to the dispute and in default of agreement to a

single arbitrator appointed by the Court under the provisions of the *Arbitration Act*, 1991, S.O. 1991, c.17. Upon any such irreconcilable difference or dispute arising either party may give notice as provided for herein to the other. The award or determination which shall be made by the above named arbitrator shall be final and binding upon the Parties hereto, their successors and assigns, and there shall be no appeal from such award or determination. The mediator should, as part of the final decision decide, what costs should be attributed to each Board as part of the mediation process.

## **12. Indemnification:**

- 12.1 Each Board shall indemnify, defend and hold harmless the other Board, and its respective directors, officers, Trustees, employees and agents from and against any and all claims, demands, damages, liabilities, costs and expenses, including solicitor's fees and expenses, which may be suffered by, accrued against or charged to the other Board by reason of or arising out of (i) an independent contract for transportation services which was not reviewed by the other Board or the General Manager of the Consortium; or (ii) the breach of this Agreement, material or otherwise, including without limitation, the breach of any of the representations, warranties, or covenants made by Boards in or under this Agreement; (iii) any claim, action or proceeding brought by an employee or former employee of the Board arising out of or based upon any law, regulation, requirement, contract or award relating to the hours of employment, working conditions, wages or compensation of any such employee; (iv) personal injuries, including death sustained by any person or persons (including, without limitation, the Board's employees) caused or occasioned, directly or indirectly, to the services for the Consortium rendered hereunder and/or the acts or omissions of a Board or its servants, agents or employees; or (v) injury or destruction of property caused or occasioned directly or indirectly by any act or omissions of a Board or its servants, agents or employees, provided, however, that in the case of clause (iv) and (v) above, a Board shall not indemnify, defend or hold harmless the other Board from or against any liability, cost or expense where such claim or damage is due to the negligence of the other Board.

- 12.2 The provisions of Section 12.1 shall survive the termination of this Agreement.

## **13. No Partnership:**

- 13.1 Each Board expressly disclaims any intention to create a partnership or joint venture by entering into this Agreement. Nothing in this Agreement shall constitute the Boards as partners or joint venturers. The Boards strictly deny any intention or agreement to be or become agents one for the other or to create a partnership or other relationship whereby either would be held liable for torts,

negligence or contractual or other acts, either of omission or commission, of the other. Neither Board shall have any authority to act for or to assume or to incur any obligations or responsibilities on behalf of the other Board save and except as expressly provided herein. Each Board covenants and agrees to indemnify the other Board from all claims, losses, costs, charges, fees, expenses, or damages that arise out of or are incurred or suffered as a result of a Board acting outside the scope of authority expressly granted pursuant to the provisions of this Agreement.

## **14. Confidentiality**

- 14.1 The Parties acknowledge that through their participation in the Consortium, they may have access to the personal information of staff, students and other individuals of and related to the other Board (the “Personal Information”). The Parties agree to use all reasonable efforts to protect the security of the Personal Information and further agree to comply with all applicable legislation in connection with the collection, use or disclosure of the Personal Information.

## **15. Procurement Policies**

- 15.1 The Consortium shall procure goods and services through the services provided by a lead Board. The lead Board and the consortium shall sign a service agreement that outlines the policies, procedures, and billing practices that are to be followed.
- 15.2 In regards to the Student Transportation Contract specifically these services will be secured through a competitive contracting practice as outlined in the Boards procurement policies.

## **16. Miscellaneous**

- 16.1 Either party may assign this Agreement to a successor Board with the consent of the other Board on the condition that the assignee agrees in writing to comply with all the assignor’s obligations as if the assignee were an original party to this Agreement.
- 16.2 This Agreement contains the entire agreement between the Parties and supersedes any previous Agreement in writing or otherwise made between the Parties hereto with respect to the subject matters hereof. The parties agree that separate service agreements will be executed subsequent to the execution of this Agreement.

- 16.3 This Agreement shall be governed by and construed in accordance with the laws of the Province of Ontario.
- 16.4 If any provision of this Agreement is invalid or unenforceable, it shall be severed from the Agreement without affecting the validity or enforceability of remaining portions of this Agreement.
- 16.5 This Agreement shall inure to the benefit of and be binding upon the respective successors and permitted assigns of the Parties hereto.
- 16.6 This Agreement may be executed in several counterparts, each of which so executed shall be deemed to be an original, and such counterparts together shall constitute one and the same instrument.
- 16.7 Primary data storage will be allocated to the production server for transportation services at a location that the Operations Committee deems suitable. This location may change from time to time. A secondary server that receives a copy of the data will be activated at a facility within the other Board to provide disaster recovery and business continuity.
- 16.8 The Head Office of the Consortium shall be at a location specified from time to time by the Operations Committee of the Consortium.

IN WITNESS WHEREOF, the Parties have executed this Agreement as of the date first written above.

TORONTO CATHOLIC DISTRICT SCHOOL BOARD

Signature

Title Ann Perron  
Director of Education

Signature

Title Angela Gauthier  
Associate Director of Education  
Academic Affairs

I / We have the authority to bind the Corporation

TORONTO DISTRICT SCHOOL BOARD

Signature

Title

Signature

Title

I / We have the authority to bind the Corporation

# SCHEDULE “A”

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## Schedule of Costs

1. Each Board understands that it is responsible for the processing and payment of transportation costs that are identified as belonging to that Board.
2. Each Board’s allocation is defined as the number of vehicles and/or students that each Board is required to transport. This number is derived from a route optimization using the Consortium’s transportation management software to define the number of buses required to provide service for students. A route optimization of each member Board’s system will be performed first to provide the basic number of buses required for each Board. A second optimization will be run in order to establish the number of vehicles required to provide service for the Consortium. The allocation of costs is the number of buses from the first optimization minus 50% of the savings from the second optimization. These optimizations should take place every four years to address any changes in the transportation population.
3. During interim years, any changes to the number of buses will result in the Board that is determined to have triggered the change to pay for these costs or obtain the savings if a reduction to bussing is implemented.
4. All wheelchair students will continue to be charged on a per head basis while the school bus operators continue to provide this service. Should the routing be performed by Consortium staff then the allocation would follow the same methodology as set out in Section 2. above.
5. Each Board agrees to pay for any buses that are assigned to the Board and are required to be in service as part of the regular transportation schedule if students from the other Board are assigned to it.
6. Each Board agrees to pay for any special arrangement that is required for any student regardless of whose vehicle the student is scheduled on. A special arrangement means but is not limited to a late in, early out, transportation out of hours for exam schedules, or specific transit for transportation home due to sickness.
7. Each Board will pay for any utilization costs on any vehicle assigned to the Board regardless of which Board triggers the cost when the bus route runs over three hours.
8. All other supplies and services will be procured through a lead Board and service agreements signed by all parties will govern aspects of this relationship.

# SCHEDULE “B”

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## Operations Committee

### Purpose

The purpose of the Operations Committee is to provide day to day operation of the Consortium through the actions of the General Manager.

### Composition

The Operations Committee will be composed of the Senior Supervisory Officer from each Board that is responsible for transportation and the General Manager.

### Roles & Responsibilities

The roles and responsibilities of the Operations Committee through the General Manager are as follows:

- Make recommendations concerning the financial planning, annual budgeting, and financial reporting of the Consortium to the Boards.
- Deal with Operator related contract issues including negotiations and dispute resolution.
- Identify and advise on policy and regulation matters.
- Deal with transportation issues including service levels and parent requests for exceptions to policies.
- Communicate and correspond with the various Provincial Ministries regarding policy direction and regulations.
- Deal with staffing and safety issues from the employee unit.

### Meetings

The Operations Committee will meet bimonthly during the course of the active school year between September and June. The General Manager will be responsible for creation and distribution of agendas and minutes. Additional meetings can be called by the General Manager as needed.

### Reporting



The General Manger is responsible for the reporting of Committee meeting minutes and the distribution to the School Boards and electronic posting. The General Manager will attend any Board meeting at the invitation from either Board should a Transportation matter be considered at the Board meeting.

# SCHEDULE “C”

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## Governance Committee

### Purpose

The purpose of the Governance Committee is to provide direction, oversight and advice with respect to transportation within the Consortium.

### Composition

The Governance Committee shall be composed of 4 members. Each Board will appoint a single Trustee to sit on the committee for a period of one year. The Senior Business Officer from each Board or designate will complete the Governance Committee. The chair of the Governance Committee will be elected originally through consensus amongst the members and will rotate yearly. The chair will be responsible for the conduct of meetings, including agendas, information processes, and the oversight of reporting and action items.

### Roles & Responsibilities

The roles and responsibilities of the Governance Committee are as follows:

- On an annual basis review the Governance Committees annual agenda of activities, mandate, and terms of reference.
- Review and report to the Boards any proposed policy changes
- Develop in conjunction with the Operations Committee a method for selecting the General Manager of the Consortium
- Perform an annual performance review of the General Manager position
- Review policies and procedures to ensure they are consistent with the goals and priorities of the Consortium.
- Mediate and resolve any unresolved issues brought forward by the Operations Committee.
- Approve and publish an annual report on the performance and accomplishments of the Consortium.

### Meetings

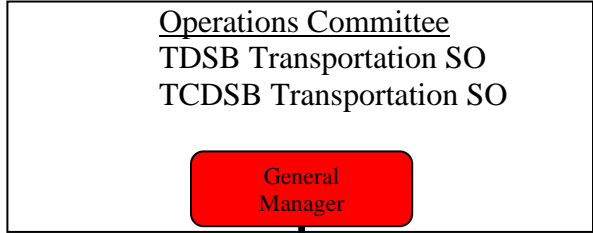
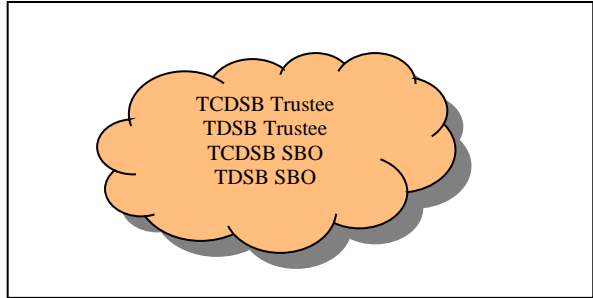
The Governance Committee will meet quarterly either face to face or through teleconference or video conference. Additional meetings may be called at the request of the Chair.

### Reporting

The Committee will ensure that minutes are taken at each meeting and that they are circulated to the Boards and posted for public review as per Board by-laws.

Assignment to the Consortium

## Governance Committee



General Manager

Office Assistant

Operations Manager

Technology & Planning Manager

Department Secretary

Technical Analyst

Transportation Planning & Technology Supervisor

Special Needs Supervisor

Area Supervisors (5)

Transportation Safety Officer

Clerk (1)

Planner (1)

Planner (6)

Area Clerk (5)

Planning Clerk (1)

**Operations (12)**

**Safety (1)**

**Planning (12)**



# **TSTG Organizational Review Phase 2 Discussion**

February 12, 2021

# Project Overview

## TSTG's Organizational Design Options were assessed based on:

- **Phase I Session held on June 24, 2020** – with TCDSB / TDSB Trustee and Senior Management Representatives on the Governance and Operations Committees, and TSTG General Manager to discuss the following topics:

- TSTG's context, and current organizational model
- Design options to explore
- Assessment Criteria to guide the analysis of identified options

## ■ **Research on best practices:**

- Selected Consortia
- Ministry sponsored studies
- Expert Reports

## ■ **Internal and External Reports**

- TSTG Membership and Service Level Agreements
- TSTG/SB Organizational Charts.
- Ombudsman, E&E, Office of the Auditor General of Ontario

# Agenda

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**The focus of this session will be on:**

- **Ranking of Options Assessment Criteria**
- **Key Observations and Recommendations**
- **High Level Assessment of Recommendations**
- **Implementation/Transitional Plan**
- **Next Steps and Report Requirements**





# Options Evaluation Criteria

# Options Evaluation Criteria

Evaluation Criteria (Guiding Values)	Description	Rating (pts)
<b>Cooperative Governance</b>	<ul style="list-style-type: none"> <li>• Ensures equal partnership among School Board « owners »</li> <li>• Recognizes the sphere of control of the SB « owners »</li> <li>• Fosters the principles of cooperation to achieve common purpose</li> </ul>	<b>37</b>
<b>Independance</b>	<ul style="list-style-type: none"> <li>• Enables TSTG flexibility, responsiveness and impartiality</li> <li>• Avoids perception of conflict of interest</li> </ul>	<b>37</b>
<b>Value Creation</b>	<ul style="list-style-type: none"> <li>• Provides opportunity for TSTG to augment organizational competencies, efficiencies and performance</li> </ul>	<b>28</b>
<b>Equitable Treatment</b>	<ul style="list-style-type: none"> <li>• Ensures fair and equitable treatment of school boards, students, parents and other stakeholders</li> </ul>	<b>27</b>
<b>Accountability</b>	<ul style="list-style-type: none"> <li>• Provides clarity in accountability and delegation of authority within TSTG and between TSTG and the SB « owners »</li> </ul>	<b>23</b>
<b>Transparency</b>	<ul style="list-style-type: none"> <li>• Ensures independant oversight of TSTG operations by relevant stakeholders</li> </ul>	<b>21</b>

# Options Evaluation Criteria

Vote Summary											
Criteria	Most (5 points)		High (3 points)		Moderate (2 points)		Low (1 point)		Ranking (Total points)		Assessed Importance
	GC	All	GC	All	GC	All	GC	All	GC	All	
Cooperative Governance	2	3	3	6	1	2			21	37	Primary
Independence	1	3	3	7			1		14	37	
Value Creation	0	1	3	7		1			9	28	Secondary
Equitable Treatment	0	1	2	6	1	2			8	27	
Accountability	0	0	3	7		1			9	23	
Transparency	0	0	3	5		3			9	21	



# Key Observations and Recommendations



# Key Observations and Recommendations

## Current State – Key Observations

### Organizational Capabilities

- TSTG is generally reactive. Its focus is on maintaining operations rather than on understanding on how performance may be improved. Strategic plan concentrates on responding to audits rather than on creating value for students.
- TSTG is dealing with staff skills and resources deficits. Organizational goals such as managing HR issues, communications, technological and service innovations remain unachievable.
- Most transportation consortia have moved on from these discussions to focus on improving efficiencies, investing in innovation, and to better managing risk.
- TSTG funding issues affect both boards and cannot currently meet transportation needs. Projected deficits for 2019-20 total \$8,4 M (TCDSB – \$5,2M) (TDSB – \$3,2M). There is no clear accountability for sustainable performance.

### Organizational Climate

- TSTG school board assigned staff have different employment conditions (including pay schedules) and reporting structures which create confusion and impact on employee morale.
- There are divided loyalties between School Board employer and the TSTG. Most employees feel they are part of School Board parent organizations rather than part of TSTG. The Ombudsman Report attributed the lack of coordination and responsiveness to issues to the dysfunctional work environment and organizational structure.

## Recommendations

1. That TSTG be incorporated as a legal entity as an enabling means to become an employer.
2. That the TSTG is empowered to direct and control over the work environment for its staff, including establishing reporting structures, employment conditions, and HR policies independent of school boards.
3. That TSTG undertake an assessment of human resource skill sets, and position profiles required to match its current and future needs.

## Implications – Value Considerations

- Organizational capabilities emerge when the collective skills, abilities and expertise of individuals are brought together to accomplish work.
- Performance accountability becomes an organizational capability when employees clearly understand what matters.
- To foster performance and cooperation, the roles and responsibilities should be sharply focused on what matters most
- Competent employees have the proper skills, while committed employees deploy those skills regularly and predictably



# Key Observations and Recommendations

## Current State – Key Observations

### Organizational Structure

- TSTG goal to reduce duplication and associated costs remains an unrealized goal. The duplication of work within the existing dual school board centric organizational structures makes it difficult to reallocate work. The Auditor General and Ombudsman reports reinforce these points.
- TSTG is missing on some if not all of the three success factors – structure, resources and tools. Most consortia have moved on and are more consolidated.
- TSTG’s divided organizational structure impedes information from flowing rapidly and clearly from the TSTG Governance Committee to management, and to staff. Lack of coordination within the current organizational structure and the degree of siloing is surprising.

### Governance Leadership and Structure

- A lack of trust between the founding school boards is at the root of the current organizational design issues. It manifests itself in the TSTG’s divided organizational structure – setting the improper tone for the organization – and influencing staff behaviour
- TSTG governance structure is dysfunctional in dealing with dispute resolution.
- Governance committee members may not have the knowledge and skills sets to understand the increasingly complex transportation environment and operations.
- There is an absence of governance policies to provide clarity around the roles, responsibilities and accountabilities of those responsible for TSTG’s Governance and Management - at all levels of the organization.
- Transparency in transportation cost allocation formula is an issue.

## Implications – Value Considerations

- Organizational structure defining the reporting relationship profoundly affects employee behaviour.
- Cooperation involves employee collaboration and coordination to increase the effectiveness of a group in pursuit of shared goals.
- A leader to exercise leadership must have the appropriate authority and influence to secure cooperation among employees.
- When decision rights and motivators are established, accountability can take hold.

“Cooperative inter-organizational relationships” (between organizations that view themselves as competitors) are created to pool support activity resources to increase efficiencies. Trust is perceived through the dimensions of cost efficiency, transparency of information, and accountable governance.

- The level of trust in leaders, and between staff is indispensable for smooth operation and long-term existence of inter-organizational relationships
- Governance structures address a board’s commitment to its “owners”, its process for making decisions and how it will assure organizational performance.
- Independent board members can contribute significantly to the decision making of a board. They can bring an objective view to the evaluation of the performance of the board and management.

## Recommendations

4. That TSTG review and consolidate its organizational structure independent of school board
5. That TSTG governance board composition include independent directors with transportation sector knowledge
6. That TSTG adopt governance policies to delineate governance and management roles and accountabilities



# High Level Assessment of Recommendations



# Recommendation 1 : TSTG as a Single Legal Entity

<b>Recommendation</b>	<ul style="list-style-type: none"> <li>• That TSTG be incorporate as a legal entity (corporation without share capital) under the Ontario <i>Corporations Act (OCA)</i>.</li> </ul>
<b>Related Org. Design Factors</b>	<ul style="list-style-type: none"> <li>• Organizational Structure, Capabilities, Climate and Culture, and Governance Leadership</li> </ul>
<b>Key Benefits - relative to the current situation</b>	<ul style="list-style-type: none"> <li>• TSTG is capable of hiring employees, to negotiate collective agreements and to bind contracts</li> <li>• Allows TSTG to optimize organizational structure, governance and accountability, reducing current organizational structure complexity and confusion by providing TSTG with the authority and control over the management of operations, staff performance and reporting structure.</li> <li>• Allows TSTG to set employment conditions and to define a distinctive organizational culture and climate</li> </ul>
<b>Key Dependencies</b>	<ul style="list-style-type: none"> <li>• By-laws defining governance structure and school board member (owner) rights</li> <li>• Corporate Membership Agreement setting out school board « owners' » understanding of the partnership arrangement.</li> </ul>
<b>Key Evaluation Criteria</b>	
<b>Cooperative Governance</b>	<ul style="list-style-type: none"> <li>• By-laws and Corporate Membership Agreement clearly define the relationship with School Board (SB) « owners », as well as SB « owner » rights and foster the principles of cooperation to achieve common purpose.</li> </ul>
<b>Independence</b>	<ul style="list-style-type: none"> <li>• Separate legal entity with control over organizational structure and staff enables TSTG's flexibility, responsiveness and impartiality.</li> </ul>
<b>Value Creation</b>	<ul style="list-style-type: none"> <li>• Separate legal entity provides opportunity for TSTG to augment organizational competencies, efficiencies and performance with control and authority over its organizational structure and staff performance</li> </ul>
<b>Equitable Treatment</b>	<ul style="list-style-type: none"> <li>• Separate impartial TSTG entity fosters fair and equitable treatment of school boards, students, parents and other stakeholders</li> </ul>
<b>Accountability</b>	<ul style="list-style-type: none"> <li>• By-laws and governance structure provide clarity in accountability and delegation of authority within TSTG and between TSTG and the SB « owners »</li> </ul>
<b>Transparency</b>	<ul style="list-style-type: none"> <li>• By-laws and governance structure and policies ensures independant oversight of TSTG operations by relevant stakeholders.</li> </ul>



# Recommendation I : TSTG as a Separate Legal Entity

## Organizational Considerations

### Single Legal Entity (SLE)

#### Governance

- Board of Directors have a higher degree of accountability to school board “owners”
- By-laws requires SLE board to report to school board “owners” on organizational performance, including financial performance
- External audits make SLE more accountable on financial matters and operational efficiencies

#### General Management

- General Manager a higher degree of accountability to Board of directors for organizational results
- General Manager more accountable for service delivery to students and for compliance to school board service levels policies (ie: Annual Report)
- More flexibility in adapting to changes, to introducing innovation (ie. technology) in dealing with a Board of Directors

#### Organizational Capabilities - Operations

- More autonomy and control over operations and resources - less operational and administrative duplication - policies, procedures and processes aligned with transportation operational environment rather than school board’s - more opportunity to access expertise and to deal with inefficiencies.
- Easier to achieve equity with student transportation service delivery without school board influence

#### Organizational Climate and Structure

- Control over staffing – hiring, job descriptions, staff performance, clarity in reporting and accountabilities - HR policies and employment condition aligned with student transportation consortium’ s mission and operational environment rather than school board’s

### Non-Single Legal Entity

- Consortium Governance Committees often regarded a school board operational committee - no formal requirement to report to school board
- Transportation decisions are brought often brought back to the school board delaying consortium governance committee decision making, which in turn impacts operational responsiveness.

- General Manager often regarded as a school board department manager; often required to attend school board meetings
- School boards are “ingrained” into consortium operations as transportation decisions are brought often brought back to them.
- School boards are less nimble to making change management decisions.

- Invoices and contracts often require additional school board authorization and signatures
- Consortium must often comply with differing school board administrative policies and processes - boards must comply to their process, which also introduces their own biases in the decisions

- Difficulty in managing human resources - HR practices, hiring matrices, union, salary scales, health breaks, holidays differ for transportation staff assigned or seconded by multiple school boards – creates tension and affects employee morale

# Recommendation I : TSTG as a Separate Legal Entity

School Board Defined

## TSTG Articles of Incorporation

- TSTG's legal framework and purpose (*Ontario Corporations Act*).

## TSTG By-laws

- Sets out how the TSTG will be governed by the school board « owners » (i.e.) election of board, board size, quorum, attendance, officers, meetings, indemnities, membership, member voting rights.

## School Board Corporate Membership Agreement

- Sets out school board « owners' » understanding of the inter-organizational arrangement (i.e.) TSTG scope of services (ex: to manage student transportation for SBs, to follow SB specific service levels policies), responsibility of the school boards, cost sharing formula(e), dispute resolution, indemnification.

## School Board Service Level Policies

- Sets out school board specific student transportation policies to which TSTG must adhere (i.e.) distance and program based policies

## TSTG Board Policies

- Governance policies defining TSTG Board's job, TSTG outcomes and operational expectations, GM authority and accountability

## TSTG Operational Policies

- Management policies operationalizing governance policies (i.e.) operational rules/procédures

TSTG Defined

# Recommendation I : TSTG as a Separate Legal Entity

<b>High Level Organizational Considerations</b>	
<b>Best Practice</b>	<ul style="list-style-type: none"> <li>Incorporating the TSTG is a leading practice recommended by the Ministry of Education and highlighted in the Auditor General of Ontario's.</li> <li>18 (56%) the transportation consortia are incorporated, of which 14 (78%) received a high E&amp;E rating (compared to 2 unincorporated).</li> </ul>
<b>Moving Forward</b>	<ul style="list-style-type: none"> <li>The School Board (of Trustees) would have to approve the incorporation as shareholders of the legal entity.</li> <li>The legal status provides the enabling vehicle for TSTG to hire and manage employees, and to establish employment and working conditions that create a TSTG brand and purposeful culture aligned with its mission.</li> <li>The independent legal structure helps ensure that TSTG's mandate remains consistent despite changes in board members, school board "owners" and trustees.</li> </ul>
<b>High Level Implementation Considerations</b>	
<b>Financial</b>	<ul style="list-style-type: none"> <li>Legal cost for incorporating entity, drafting by-laws, and corporate membership agreement.</li> </ul>
<b>Operational</b>	<ul style="list-style-type: none"> <li>Review operational processes and systems carried out by school boards on behalf of TSTG, service agreements signed on behalf of TSTG.</li> </ul>
<b>Legal</b>	<ul style="list-style-type: none"> <li>School Boards to adopt recommendation to proceed with TSTG incorporating as a legal separate entity.</li> <li>Legal counsel to assist incorporation of single legal entity without share capital under the Ontario Corporations Act, and to develop By-Laws and Corporate Membership Agreement</li> <li>School Board « owners » to adopt corporate By-Laws</li> <li>Corporate Membership Agreement may set out that service levels require consent from affected shareholders (TCDSB/TDSB board of trustees) – TSTG acts as a service provider.</li> </ul>
<b>Governance</b>	<ul style="list-style-type: none"> <li>Development of governance framework of policies would follow the incorporation of the separate legal entity</li> <li>Governance Policies reflect School Board « owner » values</li> </ul>
<b>Timeline (est)</b>	<ul style="list-style-type: none"> <li>Less than 6 months</li> </ul>
<b>Responsibility</b>	<ul style="list-style-type: none"> <li>TSTG Governance Committee</li> </ul>

# Recommendations 2-3: TSTG as an Employer

<b>Recommendations</b>	<ul style="list-style-type: none"> <li>• That the TSTG is empowered to direct and control over the work environment for its staff, including establishing reporting structures, employment conditions, and HR policies independent of school boards.</li> <li>• That TSTG undertake an assessment of human resource skill sets, and position profiles required to match its current and future needs.</li> </ul>
<b>Related Org. Design Factors</b>	<ul style="list-style-type: none"> <li>• Organizational Structure, Capabilities, Climate and Culture, and Governance Leadership</li> </ul>
<b>Key Benefits - relative to the current situation</b>	<ul style="list-style-type: none"> <li>• Allows TSTG to set employment conditions and to define a distinctive organizational culture and climate</li> <li>• Provides TSTG with unambiguous authority over HR management, including control over performance levers and enablers (i.e.) hiring and talent management practices, employment conditions, workplace policies and environment. assessment of the skill sets and position profiles to match its current and future needs.</li> </ul>
<b>Key Dependencies</b>	<ul style="list-style-type: none"> <li>• TSTG is a legal entity capable of hiring employees, negotiate collective agreements and establish HR policies.</li> <li>• Transfer of SB employees currently assigned to TSTG – can initially be seconded until a collective agreement is negotiated.</li> <li>• Harmonization of current SB collective agreements</li> </ul>
<b>Key Evaluation Criteria</b>	
<b>Cooperative Governance</b>	<ul style="list-style-type: none"> <li>• TSTG Board governance policies set out General Manager’s authority and accountability for HR relationship and performance management, and for operational expectations in relation to SB « owners’ » values.</li> </ul>
<b>Independence</b>	<ul style="list-style-type: none"> <li>• A separate legal entity employer with control over structure, HR management, employment conditions, and workplace enables TSTG’s flexibility, responsiveness and impartiality.</li> </ul>
<b>Value Creation</b>	<ul style="list-style-type: none"> <li>• Provides opportunity for TSTG to augment organizational competencies, efficiencies and performance with control and authority over organizational structure, selection of employees, HR policies and performance management</li> </ul>
<b>Equitable Treatment</b>	<ul style="list-style-type: none"> <li>• Separate impartial entity and policies foster fair and equitable treatment of school boards, students, parents and other stakeholders</li> </ul>
<b>Accountability</b>	<ul style="list-style-type: none"> <li>• TSTG Board governance policies and HR policies provide clarity in accountability and delegation of authority to TSTG GM and staff</li> </ul>
<b>Transparency</b>	<ul style="list-style-type: none"> <li>• As separate entity and employer, TSTG reporting and information structures are clearer and more transparent.</li> </ul>



# Recommendations 2-3: TSTG as an Employer

High Level Organizational Considerations	
<b>Best Practice</b>	<ul style="list-style-type: none"> <li>• Employer-Employee relationships are less complicated and the preferred approach rather than a secondment arrangement with a “host” organization that defines duration and terms of employment. An employer maintains direction and control over employee terms and conditions of employment.</li> <li>• Consortia hire their own staff but can purchase HR recruiting services from school boards. HR support and payroll services may be outsourced to a school board or other service provider. Benefits are available through a provincial employee health trust.</li> <li>• As an employer, the TSTG would have better control over its organizational capabilities – collective skills, abilities, and expertise to accomplish the work – all outcomes from managing in hiring and managing staff.</li> <li>• As an employer, the TSTG would have control over the levers that define its cultural values that guide employee behaviour and the desired focus and commitment required to deliver on TSTG’s mission and strategy - hiring and talent management practices, employment conditions, workplace environment.</li> <li>• As employer, TSTG would have control over its capacity to create a more cohesive, co-operative, and co-ordinated workplace culture - organizational performance accountability improves strongly when the level of cooperation is raised among individual staff members, and where TSTG goals are aligned with individual goals</li> </ul>
High Level Implementation Considerations	
<b>Financial</b>	<ul style="list-style-type: none"> <li>• Cost to assist on HR transitional matters from school boards to TSTG</li> </ul>
<b>Operational</b>	<ul style="list-style-type: none"> <li>• Transfer TSTG assigned employees from school boards to TSTG legal entity (new employer) - secondment arrangements between SB and TSTG until collective agreements have been finalized.</li> <li>• Review skill set requirements, position profiles, reporting and accountability structures, employment conditions</li> <li>• HR support and payroll services may be outsourced to school board(s) or other service provider(s).</li> </ul>
<b>Legal</b>	<ul style="list-style-type: none"> <li>• Legal counsel to assist in various HR transitional matters</li> </ul>
<b>Governance</b>	<ul style="list-style-type: none"> <li>• Governance policies to define delegation of authority to management, accountability for strategic outcomes and operational expectations</li> </ul>
<b>Timeline (est)</b>	<ul style="list-style-type: none"> <li>• Approximately (2) years - time to ascertain union certification, complete contract negotiations with unions.</li> </ul>
<b>Responsibility</b>	<ul style="list-style-type: none"> <li>• TSTG Board and General Manager, with school board support.</li> </ul>

# Recommendation 4: TSTG's Organizational Structure

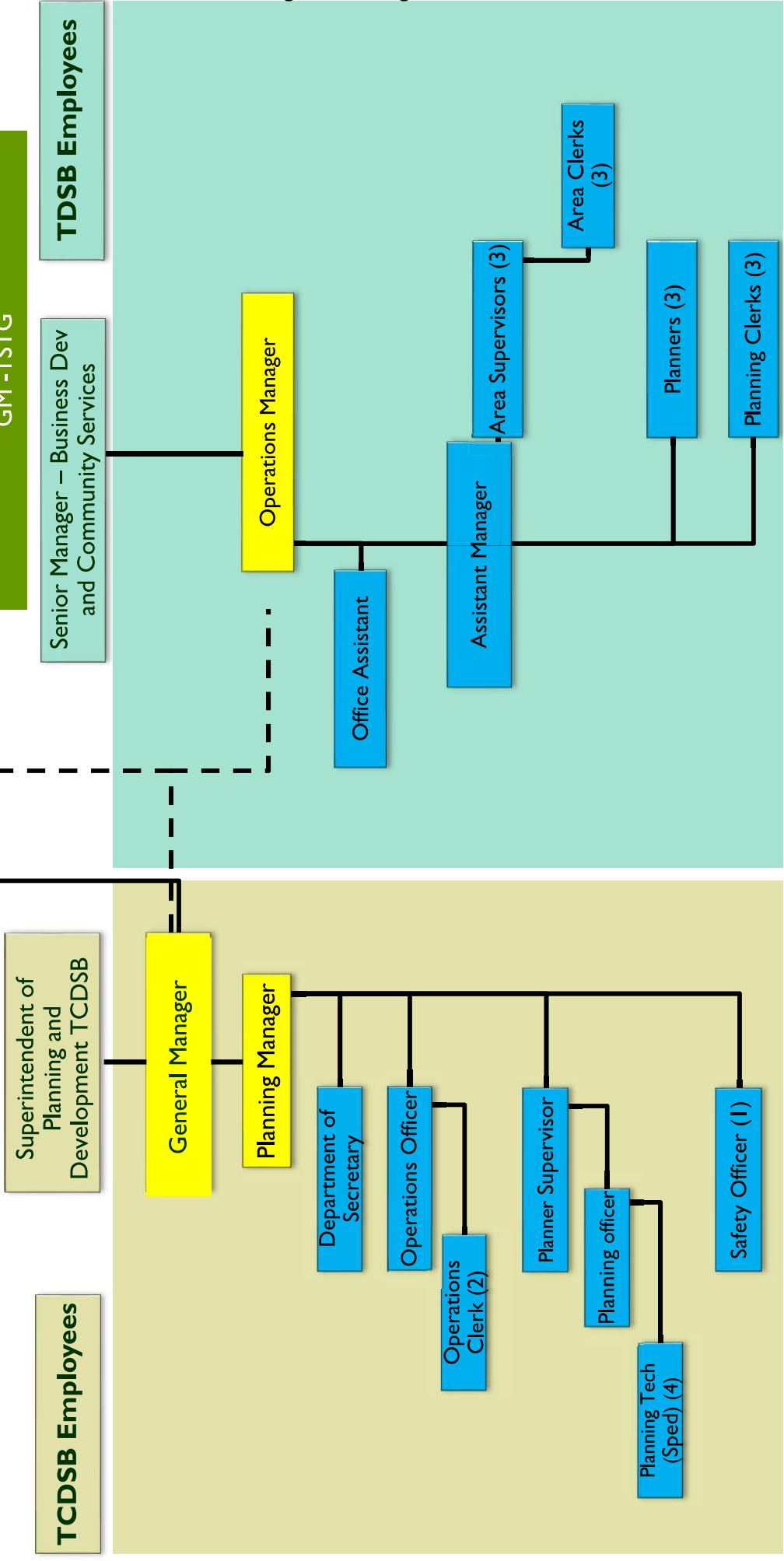
<b>Description</b>	<ul style="list-style-type: none"> <li>That TSTG review and consolidate reviews its organizational structure independent of school boards.</li> </ul>
<b>Related Org. Design Factors</b>	<ul style="list-style-type: none"> <li>Organizational Capabilities, Climate and Culture and Governance Structure</li> </ul>
<b>Key Benefits - relative to the current situation</b>	<ul style="list-style-type: none"> <li>Allows TSTG to define a single reporting relationship that affects its employee behaviour and drives TSTG performance</li> <li>Allows TSTG to improve efficiency and capabilities by addressing confusion and duplications in the current organizational structure: (i.e.) roles, accountabilities, cooperation among staff.</li> </ul>
<b>Key Dependencies</b>	<ul style="list-style-type: none"> <li>TSTG is allowed to operate as a independent entity.</li> </ul>
<b>Key Evaluation Criteria</b>	
<b>Cooperative Governance</b>	<ul style="list-style-type: none"> <li>TSTG Board governance policies set out General Manager's authority and accountability for HR relationship and performance management, and for operational expectations in relation to SB « owners' » values</li> </ul>
<b>Independence</b>	<ul style="list-style-type: none"> <li>A separate legal entity employer with control over structure, HR management, employment conditions, and workplace enables TSTG's flexibility, responsiveness and impartiality.</li> </ul>
<b>Value Creation</b>	<ul style="list-style-type: none"> <li>Provides opportunity for TSTG to augment organizational competencies, efficiencies and performance with control and authority over organizational structure, selection of employees, HR policies and performance management</li> </ul>
<b>Equitable Treatment</b>	<ul style="list-style-type: none"> <li>Separate impartial entity and policies foster fair and equitable treatment of school boards, students, parents and other stakeholders</li> </ul>
<b>Accountability</b>	<ul style="list-style-type: none"> <li>TSTG Board governance policies and HR policies provide clarity in accountability and delegation of authority to TSTG GM and staff</li> </ul>
<b>Transparency</b>	<ul style="list-style-type: none"> <li>As separate entity and employer, TSTG reporting and information structures provide clarity and transparency to TSTG Board, and to its SB « owners' ».</li> </ul>



# TSTG Organizational Structure - Current

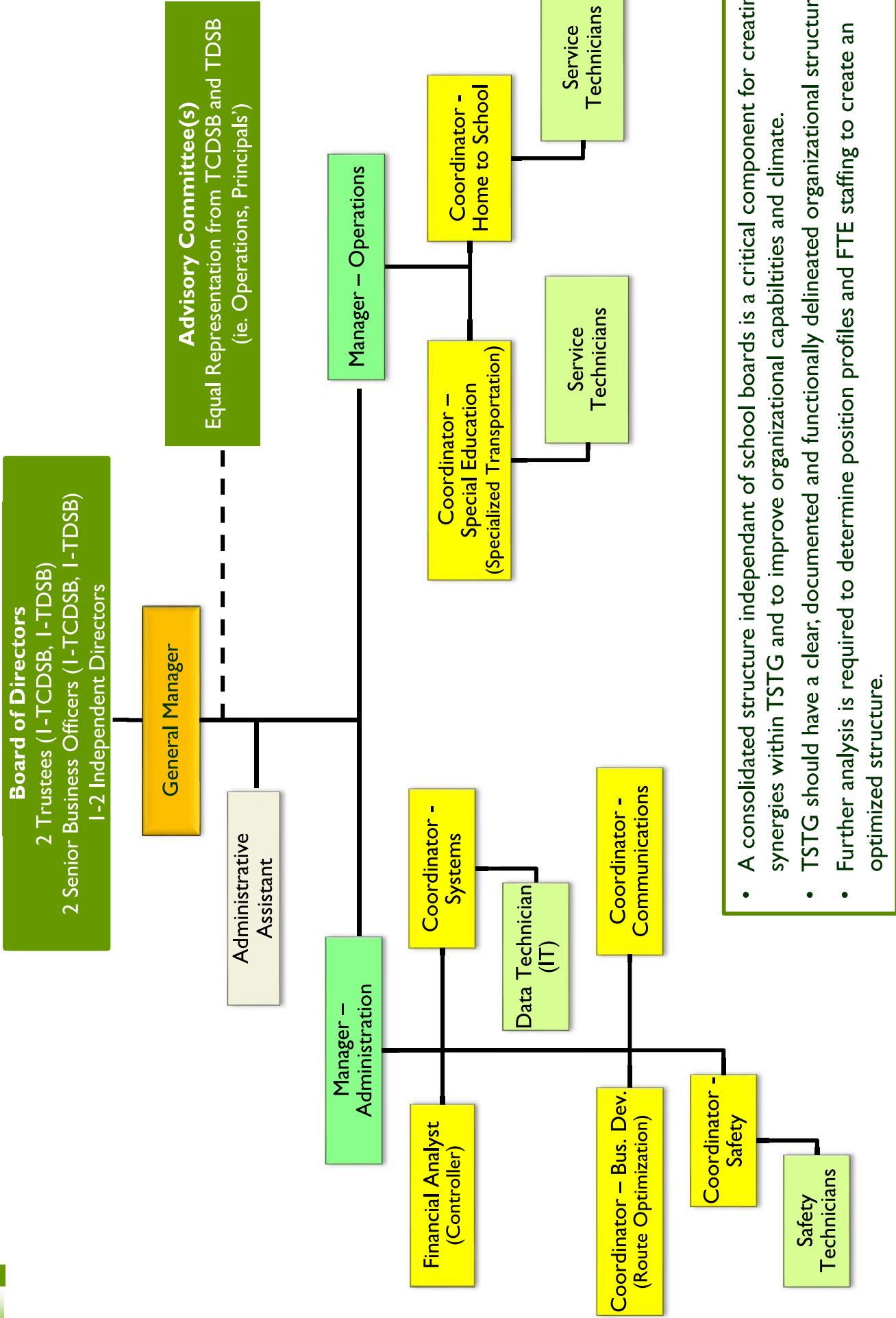
**Governance Committee**  
 2 Trustees (1-TCDSB, 1-TDSB)  
 2 Senior Business Officers (1-TCDSB, 1-TDSB)

**Operations Committee (Advisory)**  
 2 Senior Managers (1-TCDSB, 1-TDSB)  
 GM - TSTG



- TSTG's divided organizational structure impedes information flow from the TSTG governance to management, and to staff.
- The dual reporting structures to TSTG and to school boards create confusion, and divided loyalties which impact on employee morale.

# TSTG Organizational Structure - Proposed



- A consolidated structure independent of school boards is a critical component for creating synergies within TSTG and to improve organizational capabilities and climate.
- TSTG should have a clear, documented and functionally delineated organizational structure.
- Further analysis is required to determine position profiles and FTE staffing to create an optimized structure.

# Recommendation 4: TSTG's Organizational Structure

High Level Organizational Considerations	
<b>Best Practice</b>	<ul style="list-style-type: none"> <li>Organizational structures defining the reporting relationship affects employee behaviour. It promotes effective communication and coordination which will enable operations to run more effectively.</li> <li>The Transportation Consortium organizational structure is independent or delineated from the school boards it serves.</li> </ul>
<b>Moving Forward</b>	<ul style="list-style-type: none"> <li>Eliminating the TSTG's current dual organizational structure would gain efficiencies of operation through the pooling of resources, and through the sharing of ideas and talents across boundaries.</li> <li>A centralized TSTG structure will encourage cooperation and cohesive teamwork, and allow the GM to exercise leadership</li> <li>A an optimize organizational structure, will reduce employee confusion as to who is the employer, align decision making, and strengthening loyalty to TSTG with clearer and more effective mechanisms for planning, information sharing and for resolving issues.</li> <li>Organizational performance improves strongly when the level of cooperation is raised among individual staff members.</li> </ul>
High Level Implementation Considerations	
<b>Financial</b>	<ul style="list-style-type: none"> <li>Operational efficiency gains from eliminating position duplications in the current dual organizational structure.</li> <li>TSTG may require the assistance of an organizational consultant to propose the optimized structure</li> </ul>
<b>Operational</b>	<ul style="list-style-type: none"> <li>Transfer TSTG assigned employees from school boards to TSTG legal entity (new employer) – transitional structure</li> <li>Note: most employees accept to transfer to consortia after the transitional - secondment period</li> <li>Review roles, reporting and accountability structures to determine long-term organizational structure and HR requirements</li> </ul>
<b>Legal</b>	<ul style="list-style-type: none"> <li>TSTG must be a legal entity to become an employer.</li> </ul>
<b>Governance</b>	<ul style="list-style-type: none"> <li>Governance policies to define delegation of authority to management and accountability for strategic outcomes and operational expectations</li> </ul>
<b>Timeline (est)</b>	<ul style="list-style-type: none"> <li>Approximately 3 months - Phase 1 – transition structure - to execute employee secondment arrangements</li> <li>Less than 3 years – to review L/T Organizational Structure</li> </ul>
<b>Responsibility</b>	<ul style="list-style-type: none"> <li>TSTG Board and General Manager</li> </ul>

# Recommendations 5-6: TSTG's Governance Structure

<b>Recommendations</b>	<ul style="list-style-type: none"> <li>• That TSTG governance board composition includes independent directors with transportation sector knowledge</li> <li>• That TSTG adopt governance policies to delineate governance and management roles and accountabilities</li> </ul>
<b>Related Org. Design Factors</b>	<ul style="list-style-type: none"> <li>• Governance Leadership</li> </ul>
<b>Key Benefits - relative to the current situation</b>	<ul style="list-style-type: none"> <li>• Allows TSTG Board to improve board and management accountability to SB “owners”</li> <li>• Allow TSTG to benefit from independent directors with transportation sector expertise for strategy setting and risk oversight and in exercising objective independent judgements.</li> </ul>
<b>Key Dependencies</b>	<ul style="list-style-type: none"> <li>• By-law defining governance structure and school board member « Owner » rights</li> </ul>
<b>Key Evaluation Criteria</b>	
<b>Cooperative Governance</b>	<ul style="list-style-type: none"> <li>• By-laws and Corporate Membership Agreement clearly define the relationship with School Board (SB) « owners », SB « owner » rights and the principles of cooperation to achieve common purpose.</li> <li>• TSTG governance policies define its commitment and accountability to SB “owners, TSTG Board’s job, TSTG outcomes and operational expectations, GM authority and accountability.</li> </ul>
<b>Independence</b>	<ul style="list-style-type: none"> <li>• A board make-up including independent directors reinforces board impartiality and objectivity.</li> </ul>
<b>Value Creation</b>	<ul style="list-style-type: none"> <li>• Independent director with transportation sector knowledge provides opportunity to improve assessment of organizational competencies, efficiencies and performance</li> </ul>
<b>Equitable Treatment</b>	<ul style="list-style-type: none"> <li>• Separate legal entity and governance policies, board make-up including independent directors, foster fair and equitable treatment of school boards, students, parents and other stakeholders</li> </ul>
<b>Accountability</b>	<ul style="list-style-type: none"> <li>• TSTG Board governance policies provide clarity in accountability and delegation of authority within TSTG and between TSTG and the SB « owners</li> </ul>
<b>Transparency</b>	<ul style="list-style-type: none"> <li>• Separate legal entity, by-laws and governance policies, and board make-up including independent directors ensure independent oversight of TSTG operations by relevant stakeholders</li> </ul>



# Board Composition Scenarios

Scenario	Implications – Value Considerations
<p><b>General Comment - Board Chair</b></p> <ul style="list-style-type: none"> <li>As to whether the Chair is required to cast a vote at board meetings, a Chair’s role is to try and achieve board member consensus on an issue. Boards stuck at a 50/50 vote on an issue, would probably want to discuss the matter more thoroughly and get consensus on the decision rather than pass something through because it won by one vote</li> <li>Where the Chair has a casting vote on a tie, they may or may not be compelled to cast it. A Chair must act in good faith in casting a tiebreaking vote.</li> </ul>	
<p><b>Scenario 1a: Appoint One Independent Director as Board Member</b></p> <ul style="list-style-type: none"> <li>Jointly appointed by school board “owners”</li> <li>The independent member is not eligible to assume role of Chair, where school board “owners” prefer to continue practice of having the chairperson position rotate among school board appointed representatives.</li> </ul>	<p><b>Board size: 5 (Status quo +1)</b></p> <ul style="list-style-type: none"> <li>The independent director contributes expertise and independent judgment to the board</li> <li>Board decisions would normally be made by an even number of four board members.</li> <li>School board representative chairperson may be compelled to vote in conformity with other school board representatives if board at 50/50 vote.</li> </ul>
<p><b>Scenario 1b: Appoint One Independent Director as Board Chair</b></p> <ul style="list-style-type: none"> <li>Jointly appointed by school board “owners”</li> </ul>	<p><b>Board size: 5 (Status quo +1)</b></p> <ul style="list-style-type: none"> <li>Same as 1a, except:</li> <li>The independent director would likely add neutrality and impartiality to the Chairperson role, if board at 50/50 vote.</li> </ul>
<p><b>Scenario 2a Appoint two Independent Directors as Board Members</b></p> <ul style="list-style-type: none"> <li>Jointly or independently appointed by school board “owners”</li> <li>The independent member is not eligible to assume role of Chair, where school board “owners” prefer to continue practice of having the chairperson position rotate among school board appointed representatives.</li> </ul>	<p><b>Board size: 6 (Status quo +2)</b></p> <ul style="list-style-type: none"> <li>TSTG benefits from additional expertise and independent judgment on the board</li> <li>Board decisions would normally be made by an odd number of five board members.</li> <li>School board representative chairperson may be compelled to vote in conformity with other school board representatives to defeat a motion.</li> </ul>
<p><b>Scenario 2b: Appoint two Independent Directors, among which one as Chair</b></p> <ul style="list-style-type: none"> <li>Jointly appointed by school board “owners”</li> </ul>	<p><b>Board size: 6 (Status quo +2)</b></p> <ul style="list-style-type: none"> <li>Same as 2a, except:</li> <li>The independent director would likely add neutrality and impartiality to the Chairperson role.</li> </ul>

# Recommendation 5-6: TSTG's Governance Structure

<b>High Level Organizational Considerations</b>	
	<ul style="list-style-type: none"> <li>Expert independent board members can contribute significantly to the decision making of a board. They can also bring an objective view to the evaluation of the performance of the board and management.</li> <li>Odd number of directors and presence of independent directors are more likely to improve voting efficiency and in decisions based on organizational performance as opposed to the “conformity preference”, especially among smaller constituency representative boards. However, the “conformity preference” becomes less important for even number boards that include independent directors.</li> <li>Governance framework of policies address four things in an organization’s relationship with “owners” and with management:             <ul style="list-style-type: none"> <li>Governance Process – defines Board’s mandate, its commitment to its “owners”, its process for making decisions.</li> <li>Board-Management Delegations – defines Board’s delegation of authority to, and oversight over management</li> <li>Strategic Direction - defines Board’s expectations about outcomes</li> <li>Operational Direction – defines Board’s operational expectations within limits of prudence (risk) and ethics within which operational (management) decisions can be made.</li> </ul> </li> <li>The TSTG board size could range between five and six members, with the addition of one or two independent board members knowledgeable in the transportation field. The school boards could individually appoint or jointly appoint independent directors. School board owners could consider jointly appointing an independent board member as Board Chair.</li> <li>Develop a skills and competence matrix to define the independent director profile.</li> <li>Development of governance framework of policies would follow the incorporation of the separate legal entity</li> </ul>
<b>Best Practice</b>	
<b>Moving Forward</b>	
<b>High Level Implementation Considerations</b>	
<b>Financial</b>	<ul style="list-style-type: none"> <li>An honorarium may be necessary to attract independent directors</li> <li>Cost to develop governance policies</li> </ul>
<b>Legal</b>	<ul style="list-style-type: none"> <li>By-laws to define board size, composition and director appointment process involving school board « owners »</li> <li>In relation to independent directors, if desirable by school board « owners », by-laws would reflect director appointment process and also the appointment of the Board Chair.</li> </ul>
<b>Governance</b>	<ul style="list-style-type: none"> <li>Process to develop governance framework and policies</li> </ul>
<b>Timeline (est)</b>	<ul style="list-style-type: none"> <li>Less than 2 years - time to incorporate legal entity and develop governance policies</li> </ul>
<b>Responsibility</b>	<ul style="list-style-type: none"> <li>TSTG Board following school board approval to establish TSTG as a legal entity</li> </ul>







# Next Steps

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- **Complete the Case for Change**
  - Project Champions – trustees, senior management within the TCDSB and TDSB
  - SB Senior Management approval for project
  - SB Trustee approval for project
  - Final Report Requirements



# Our Mission

To enable all students to reach high levels of achievement and well-being and to acquire the knowledge, skills and values they need to become responsible, contributing members of a democratic and sustainable society.

## We Value

- Each and every student's interests, strengths, passions, identities and needs
- A strong public education system
- A partnership of students, staff, family and community
- Shared leadership that builds trust, supports effective practices and enhances high expectations
- The diversity of our students, staff and our community
- The commitment and skills of our staff
- Equity, innovation, accountability and accessibility
- Learning and working spaces that are inclusive, caring, safe, respectful and environmentally sustainable

## Our Goals

### **Transform Student Learning**

We will have high expectations for all students and provide positive, supportive learning environments. On a foundation of literacy and math, students will deal with issues such as environmental sustainability, poverty and social justice to develop compassion, empathy and problem solving skills. Students will develop an understanding of technology and the ability to build healthy relationships.

### **Create a Culture for Student and Staff Well-Being**

We will build positive school cultures and workplaces where mental health and well-being is a priority for all staff and students. Teachers will be provided with professional learning opportunities and the tools necessary to effectively support students, schools and communities.

### **Provide Equity of Access to Learning Opportunities for All Students**

We will ensure that all schools offer a wide range of programming that reflects the voices, choices, abilities, identities and experiences of students. We will continually review policies, procedures and practices to ensure that they promote equity, inclusion and human rights practices and enhance learning opportunities for all students.

### **Allocate Human and Financial Resources Strategically to Support Student Needs**

We will allocate resources, renew schools, improve services and remove barriers and biases to support student achievement and accommodate the different needs of students, staff and the community.

### **Build Strong Relationships and Partnerships Within School Communities to Support Student Learning and Well-Being**

We will strengthen relationships and continue to build partnerships among students, staff, families and communities that support student needs and improve learning and well-being. We will continue to create an environment where every voice is welcomed and has influence.

### **Acknowledgement of Traditional Lands**

We acknowledge we are hosted on the lands of the Mississaugas of the Anishinaabe (ANISH NA BEE), the Haudenosaunee (HOE DENA SHOW NEE) Confederacy and the Wendat. We also recognize the enduring presence of all First Nations, Métis and Inuit people.

### **Planning and Priorities Committee Mandate**

The Planning and Priorities Committee shall make recommendations to the Board on:

- (a) the development and coordination of a strategic plan for the Board, in consultation with the Director and the standing Committees;
- (b) the Board's inter-governmental relations;
- (c) matters relating to meetings of the Board and the standing Committees;
- (d) the Board's Bylaws and procedures;
- (e) professional development for members of the Board;
- (f) planning and other related matters; and,
- (g) facility and property matters, including property disposition, major capital projects, boundary changes; and,
- (h) other issues referred time to time by the Board or the Chair of the Board or Committee.

## **Funding Information Requirement**

At the special meeting held on March 7, 2007, the Board decided that to be in order any trustee motion or staff recommendation that would require the Board to expend funds for a new initiative include the following information: the projected cost of implementing the proposal; the recommended source of the required funds, including any required amendments to the Board's approved budget; an analysis of the financial implications prepared by staff; and a framework to explain the expected benefit and outcome as a result of the expenditure.

### **[1]Closing of certain committee meetings**

(2) A meeting of a committee of a board, including a committee of the whole board, may be closed to the public when the subject-matter under consideration involves,

- (a) the security of the property of the board;
- (b) the disclosure of intimate, personal or financial information in respect of a member of the board or committee, an employee or prospective employee of the board or a pupil or his or her parent or guardian;
- (c) the acquisition or disposal of a school site;
- (d) decisions in respect of negotiations with employees of the board; or
- (e) litigation affecting the board. R.S.O. 1990, c. E.2, s. 207 (2).

(2.1) Closing of meetings re certain investigations – A meeting of a board or a committee of a board, including a committee of the whole board shall be closed to the public when the subject-matter under considerations involves an ongoing investigation under the Ombudsman Act respecting the board