

**SCHOOL DISTRICT NO. 8 (KOOTENAY LAKE)**  
**STUDENT TRANSPORTATION SERVICES REVIEW**

SUBMITTED TO  
**BOARD OF EDUCATION**  
**SCHOOL DISTRICT NO. 8 (KOOTENAY LAKE)**

PREPARED BY  
**TRILLIUM *BUSINESS STRATEGIES INC.***

IN ASSOCIATION WITH  
**GRITTNER & ASSOCIATES**

**APRIL 2009**

# STUDENT TRANSPORTATION SERVICES REVIEW

## 1. INTRODUCTION

Student transportation services are an important component in the delivery of public education in the Kootenay Lake School District. Almost half of all students in School District No. 8 ride a school bus to and from school.

In recent years the transportation system has responded to service changes necessitated by declines in enrolments, closure of schools, changes to catchment areas and increased client expectations. Escalating energy costs have placed additional pressure on the system's limited resources.

In response to this situation, the Board of Education initiated a comprehensive review of student transportation services.

The expectation is that the review will provide answers to the following questions:

1. Is the system providing relatively equitable levels of transportation service to enable students to get to and from school?
2. Are there ways transportation service delivery arrangements can be optimized to achieve efficiencies?

The School District engaged Doug Hibbins of TRILLIUM *Business Strategies Inc.* and Kelly Grittner of Grittner and Associates to complete this review. Both have extensive experience in administration of public education and the delivery of student transportation services. Information about the review team is presented in Appendix A.

This report presents the findings of the review and makes specific recommendations on how the transportation system can be improved and efficiencies can be achieved.

## 2. APPROACH

Upon commencement of the project, we developed a preliminary work plan and reviewed it with the School District. The Preliminary Work Plan is presented in Appendix B. We asked the School District to assemble and make the following information available for review:

- a) All relevant Board policies including:
  - Entitlement to student transportation
  - Cross-boundary attendance within District
- b) Non-Teaching Collective Agreement
- c) Catchment area maps
- d) Service delivery arrangements (by region)
- e) Bus Routes
- f) Bus Schedules
- g) School Bus Capital Stock
- h) Unique geographic constraints
- i) Budgeted and Actual Student Transportation Expenditures (2003/04 to 2007/08)
- j) Building Capacities (Nominal and Operating)
- k) September 2008 enrolment by school and grade level
- l) Ministry enrolment projections (by school)
- m) Any enrolment projections developed by the School District
- n) Most recent Capital Plan Submission
- o) School Condition Surveys
- p) School line drawings if available electronically (AutoCAD or .pdf format)
- q) All relevant information relating to Programs of Choice (e.g. French Immersion, StrongStart)
- r) All relevant information relating to International Education programs
- s) All relevant information relating to Out-of-District enrolments

During the project we met with the two Transportation Coordinators to obtain detailed information regarding the operation of the transportation system.

A Transportation Services Review Advisory Committee was formed to offer perspectives on the challenges of delivering student transportation services in the Kootenay Lake School District and to assist in identifying opportunities for providing equitable levels of service and achieving service efficiencies.

The Advisory Committee consisted of:

- Two Trustees
- District Parent Advisory Council Representative
- Kootenay Lake Teachers Association Representative
- Two Canadian Union of Public Employees Representatives
- Two School Principals
- Secretary-Treasurer
- Director of Student Services
- Director of Operations
- Manager of Operations
- Transportation Coordinators

Our initial meeting with the Board of Education was held on February 24, 2009.

Meetings with the Advisory Committee were held on January 14<sup>th</sup> and March 24<sup>th</sup>, 2009.

Materials presented to the Board of Education and the Advisory Committee were similar in content. Materials included

- Preliminary work plan
- Legislative framework
- Relevant District policies and regulations
- Evolution of student transportation funding arrangements
- School District Transportation Budget 2008/09 Year
- Comparison of School District Bus Transportation Costs (District-owned)
- District enrolment trends
- School capacity utilization
- Range of efficiency opportunities
- Potential approach for School District No. 8 (Kootenay Lake)

Our work with the Board of Education and the Advisory Committee focused on the range of efficiency opportunities that are often available to school districts. The potential opportunities are as follows.

#### **A. OPPORTUNITIES INVOLVING NO CHANGE TO SERVICE LEVELS**

- Standardize school calendar
- Optimize bell times (minor adjustments)

- Implement full-day kindergarten
- Implement four-day school week
- Optimize bus size
- Reduce operating costs (fuel, O&M)
- Reduce dead-head mileage
- Implement alternative service delivery arrangements

## **B. OPPORTUNITIES INVOLVING CHANGES TO SERVICE LEVELS**

- Increase walk limits
- Increase walk-to-stop distances
- Increase trip duration (time on bus)
- Adjust delivery arrangements for students with special needs
- Optimize bell times (major adjustments)
- Implement alternative service delivery arrangements
  - transportation assistance
  - other service providers

## **C. OPPORTUNITIES INVOLVING ELIMINATION OF SERVICE**

- Eliminate or charge for services for ineligible students
- Eliminate noon kindergarten service
- Eliminate cross-boundary service
- Eliminate extra runs
- Eliminate French Immersion service
- Establish threshold for minimum number of students (route terminus)

We reviewed the range of potential opportunities and noted that the School District has already achieved the following efficiencies.

### ***Standardized School Calendar***

The School District has adopted a standardized school calendar where the days of instruction are common to all schools within a service area. This approach ensures that the number of days that the District offers student transportation services are minimized.

### **Noon Kindergarten Service**

The School District does not provide transportation services to kindergarten students at noon. This approach ensures that additional bus runs are not operated for only a few students.

### **Optimized Bus Size**

The School District has standardized on 72 passenger buses, a size which is considered optimal for most school districts. This approach enables the school district to minimize the total kilometers of bussing each day which maintaining a reasonable level of service.

We then developed a possible approach based on the remaining opportunities, and presented the list of potential changes to the Board of Education for consideration. The potential changes are as follows.

1. Modify and adhere to walk limits (*see note*)
2. Establish and adhere to walk-to-stop limits (*see note*)
3. Discontinue out-of-catchment area bus service (*see note*)
4. Provide transportation assistance for students in remote areas
5. Adjust bell times
6. Optimize routes.
7. Explore synergies with BC Transit

(*Note: with some discretion for special circumstances*)

The Board of Education was asked for direction as to which of these potential changes approaches should be pursued. The consensus was that all should be included in the list of potential changes.

The list of potential changes was presented to the Advisory Committee on March 24<sup>th</sup>, 2009 and each potential change was discussed in some detail. Committee members were asked for input on each of the potential changes identified by the review team for consideration. Suggested distances for walk limits and walk-to-stop limits were discussed and recorded.

### 3. GENERAL OBSERVATIONS

This process has enabled us to hear and gather input and information from diverse sources. We note with appreciation the openness with which strong opinions were voiced and the respect with which participants listened to one another. While people had differing views, they expressed their views in an atmosphere of mutual respect. For the most part, participants clarified information that was previously provided or offered new information relevant to the potential opportunity.

At each meeting, participants shared the view that the transportation system was providing an excellent service to the students of the Kootenay Lake School District. Participants also observed that many small accommodations made over time have resulted in differing service levels for the various service areas within the District.

There was widespread agreement that the system should be “tweaked” to achieve efficiencies but in doing so, consideration needed to be given to the safety of students. We noted concern over what would constitute a “special circumstance” and who would determine which circumstances were special enough to warrant some variation in service levels prescribed in policy and regulations.

Participants expressed an appreciation of challenge facing a school district in resetting student transportation service levels. We heard that it is important to set a base level for student transportation services and ensure that the base level provides equitable access to services.

The issue of parental responsibility was raised several times. It was suggested that any changes in the transportation system will need to be accompanied by a policy statement clarifying the responsibilities of the School District and the responsibilities of parents regarding the provision of student transportation services, and the responsibility for supervision at stops and at school.

We noted that the primary reason for conducting a student transportation services review was to ensure that equitable levels of service are in place and that services are being delivered efficiently. We did not hear suggestions that efficiencies need to be made in the transportation system so as to cover budgetary shortfalls in other areas.

There is a general awareness that funding levels for student transportation services were set by the Province in 2001/02 and that School District No. 8 (Kootenay Lake) current student transportation spending levels remain are only slightly above the 2001/02 funding level.

During the discussions we noted a continued reference to the need for a transportation system that meets the basic needs of the students. There appears to be strong consensus that implementing the recommended changes will accommodate that need in a fiscally responsible manner.

#### 4. SPECIFIC FINDINGS AND RECOMMENDATIONS

Findings and recommendations are presented in the same order as they appeared in the list of potential changes presented in Section 2 of this report.

##### **Walk Limits**

We noted that the formal Board policy sets out walk limits of:

Grades K-7 4.0 km

Grades 8-12 4.8 km

These are similar to limits which the Ministry of Education used previously to determine eligibility for transportation funding. School Districts have always been free to determine if student transportation services should be provided, and what service levels are appropriate.

School District No. 8 (Kootenay Lake) has generally not enforced walk limits in recent years. Statistics gathered for the Creston area show that nearly 25% of elementary students receiving school bus service in the morning would be ineligible under the published walk limits of 4.0 km. In the afternoon the percent of students rises to almost 50%. At the secondary level the rate of ineligible students riding the bus is approximately 25% in the morning and 35% in the afternoon.

Statistics were not available for the Nelson area but anecdotal evidence suggests a similar level of ineligible ridership under these walk limits.

##### **Recommendation #1**

*It is recommended that the District modify and adhere to the following walk limits (with some discretion for special circumstances):*

*2.5 km for Elementary*

*3.0 km for Secondary*

*Examples of special circumstances will need to be developed and noted in policy/regulations (i.e. illness with a medical certificate, special needs student, etc). Final approval of exemptions or modifications of walk limits should rest with the Director of Operations.*

*The School District may need to consider some means of ensuring that ineligible students are not boarding school buses. This could involve the issuance of bus passes to eligible students.*

### **Walk to Stop Limits**

We were advised that the School District has not enforced walk-to-stop limits for some time.

An examination of routes and distances between stops indicates that stops are often less than 1 km apart and in some cases buses are stopping every .5 km to pick up and drop off students.

Ideally bus stops along the routes should be spaced equidistant between side roads and driveways, thereby providing students with walks to stops that are less than the walk-to-stop limit.

The reality is that in Kootenay Lake School District many buses travel on busy highways and on gravel side roads. Both of these conditions compromise the spacing bus stops. The safety of students must always be the prime consideration when determining stops.

We noted that a procedure is in place which brings the Ministry of Transportation, the RCMP and the Bus Coordinators together to review the safety of bus stops. This procedure seems to be working well and should be continued.

#### **Recommendation #2**

*It is recommended that the School District:*

- *establish and adhere to walk-to-stop limits of 2.5 km, and*
- *plan routes based on pick up points located approximately 2.5 km apart (with some discretion for special circumstances)*

*Examples of special circumstances need to be developed and noted in policy/regulations (i.e. illness with a medical certificate, special needs student, road conditions, special traffic situations, etc.)*

### **Out of Catchment Bus Service**

The *School Act* requires that a school district define the catchment area for each of the schools in the district. Students generally complete an application form requesting permission to attend a school other than their home school. The decision to grant the cross boundary application rests with the local school district. The decision to provide bus service to students attending a school outside their catchment area is also a decision of the local school district.

#### **Recommendation #3**

*It is recommended that the School District discontinue out-of-catchment area bus service with some discretion for special circumstances.*

*Examples of special circumstances need to be developed and noted in policy/regulations (e.g. to attend a District program).*

### **Transportation Assistance, New Routes and Route Extensions**

In School District No. 8 (Kootenay Lake) transportation assistance is paid to parents who live beyond existing bus routes. This is not a frequent occurrence given the vast network of bus routes and stops. There is evidence that in some areas, providing transportation assistance is a better solution than creating a new route or extending an existing bus routes.

#### **Recommendation #4**

*It is recommended that the District continue the practice of providing transportation assistance for students in remote areas and in situations where transportation assistance is a viable option due to road conditions.*

*New bus routes should only be considered where a sufficient number of students reside beyond walk limits and road conditions are sufficient for safe operation of a school bus.*

*It is recommended that the District consider discontinuing school bus service and instead provide transportation assistance in remote areas where there are less than eight students.*

*Extension of an existing bus should only be considered if eight or more students reside beyond walk limits to the nearest bus stop. Road conditions and the impact on the existing run schedule are to be considered before approval is given.*

*The payment of transportation assistance should also be considered before approving any request for route extension.*

### **Bell Time Adjustments**

Adjusting bell times can be an effective way of reducing costs of providing student transportation services. Bell time optimization is generally implemented by scheduling an elementary school to start or dismiss earlier than a neighbouring secondary school. This allows for separate elementary and secondary runs to be completed by one bus rather than two. In some cases there is only a partial saving given that the double route takes longer to complete resulting in additional time being added to the other driver's shift.

In the Creston area, several elementary schools are dismissed earlier than the secondary school. Elementary students are transported home and the buses return to pick up the secondary students. This practice is actually more costly for the School District, as it has resulted in additional daily kilometers for several buses. It also appears

to be one of the reasons for an additional afternoon bus run to Yahk. It is estimated this level of service costs an extra \$200 per day or \$38,000 per annum.

**Recommendation #5**

*It is recommended that the School District explore opportunities to optimize bell times with a view to reducing before school and after school waiting time for bus students, decreasing trip duration, and optimizing service delivery within the service area.*

*These improvements can be explored and implemented over time.*

**Route Optimization**

Implementing changes to walk limits, walk-to-stop limits and cross boundary transportation services will create opportunities to optimize bus routes and achieve some efficiencies. The Transportation Coordinators will be responsible for collecting information and planning any route changes required as a result of this review. This information will allow for an initial “tweaking” of the system. A second review of routes and stops should be conducted to identify further opportunities that may have been created as a result of the initial changes to service levels.

Route optimization computer services are available from several sources and there are several software options available to school districts to assist them in optimizing student transportation services. These services and systems can be valuable tools in the planning of routes and optimizing of service levels.

**Recommendation #6**

*It is recommended that the School District complete a supplementary review of bus routes in February 2010 and that the District consider an upgrade of the existing transportation software to provide additional tools for managing and auditing the transportation system.*

**Synergies with BC Transit**

There is a growing trend in school districts, particularly in urban areas, to encourage students to utilize transit service as a convenient and cost effective means of traveling to and from school.

Almost two decades ago, the former Trail School District (which now forms part of the Kootenay-Columbia School District), and the Kootenay Boundary Transit System agreed to utilize the municipal transit service to provide transportation service to eligible secondary students in the Trail area. Transit routes and schedules were adjusted to serve students more directly and a special discounted student monthly transit pass was introduced.

Kootenay-Columbia School District purchases bus passes for all eligible secondary students. The passes entitle the students to use transit buses. Student demographics and the school calendar are taken into consideration when transit routes and schedules are determined. The School District continues to provide school bus service to eligible elementary students in the Trail area using District owned and operated school buses.

While students and parents had reservations about the new service delivery model when it was first implemented, it appears that the model is now well accepted. Today, almost 400 students make use of the transit system to get back and forth to school. Students have greater flexibility in getting to and from school, and enjoy the use of a bus pass for non-school travel.

Transit users have also benefited from these arrangements. The Kootenay Boundary Transit System has been able to offer transit service to marginal ridership areas because of fare box revenues generated through the sale of bus passes to the School District.

We note that similar arrangements may be possible in the Nelson service area. We understand that BC Transit and the City of Nelson recently developed a Strategy for the Conventional and Custom Transit System, and these entities are working together to improve services for the people of Nelson.

***Recommendation #7***

*It is recommended that the District explore opportunities to provide secondary student transportation services in the Nelson area through a partnership with the Nelson Transit System, and explore opportunities to provide services to students with special needs in the Creston area through a partnership with BC Transit.*

***Management of the Transportation System***

The Director of Operations has overall responsibility for delivery of student transportation services.

Two Transportation Coordinators; one for the Creston area and one for the Nelson area, are responsible for day-to-day service delivery. Each Coordinator has an excellent understanding of student transportation services in their service area, and has a basic working knowledge of the other service area.

The Coordinator in the Creston area drives one route a day; the Coordinator in the Nelson area does not have a regular run. Both fill in occasionally when spare drivers are not available.

**Recommendation #8**

*It is recommended that the School District plan to consolidate the responsibilities of the Transportation Coordinators at such time as one of the Coordinator positions becomes vacant.*

*The plan should allow for the Coordinator to live in Nelson but spend at least one day per week in the Creston service area. While the District would incur travel costs and a living out allowance, the consolidation of these positions will result in efficiencies for the District.*

**5. CONCLUSION**

The recommendations contained in this report contemplate a resetting of basic service levels for student transportation in School District No. 8 (Kootenay Lake). Some of the opportunities identified can be implemented for the next school year. Others will need to evolve over time and be implemented as opportunities arise.

Prior to adoption of some or all of these recommendations, it is suggested that students, parents, staff and other stakeholders be given an opportunity to express their views about the proposed changes.

The approach that we have recommended can ensure that relatively equitable levels of student transportation services are provided in all service areas, and will achieve operating efficiencies, thereby maximizing resources available for student achievement.

## APPENDIX A

### THE PROJECT TEAM

***Douglas Hibbins, Principal***  
**TRILLIUM Business Strategies Inc.**

TRILLIUM *Business Strategies Inc.* was founded in 1999 and provides a variety of business planning and infrastructure development services to a broad range of public clients including the Ministry of Education, numerous BC school districts, post-secondary institutions, and municipal governments.

Douglas Hibbins, P.Eng., Principal has extensive experience in the education sector.

Doug was employed by the Board of Education, School District No. 15 (Penticton) from 1979 to 1989, serving first as Assistant Secretary-Treasurer and then as Secretary-Treasurer.

Doug served as Director, School Finance Branch, Ministry of Education from 1989 to 1990, and as Assistant Deputy Minister, Ministry of Education from 1990 to 1994 and was responsible for Schools Finance, Schools Capital and Student Transportation.

TRILLIUM has undertaken a number of student transportation projects for the Ministry of Education, BC school districts, and BC Transit.

**Kelly Grittner**  
**Grittner and Associates**

Kelly has extensive experience in the delivery of public education, particularly in rural areas. He has served as Secretary-Treasurer for a number of BC School Districts including Armstrong, Summerland, Keremeos, Southern Okanagan, Queen Charlottes, and Sunshine Coast.

For the past 5 years, Kelly has provided a range of consulting services to BC school districts, and has devoted a large portion of his time to community service in the North Okanagan.

Most recently Kelly has been responsible for optimizing student transportation services in all regions of the province for the Conseil Scolaire Francophone.

## APPENDIX B

### PRELIMINARY WORK PLAN

1. Familiarization
2. Meet with Review Advisory Committee to discuss project objectives and possible outcomes January 14, 2009
3. Undertake analysis of current service levels, service delivery arrangements January / February
  - Review capacity utilization of school facilities January / February
  - Explore possible synergies with BC Transit January / February
4. Meet with Review Advisory Committee and present observations and potential opportunities to achieve efficiencies February 24, 2009
5. Report progress to Board of Education February 24, 2009
6. Finalize next steps February 24, 2009

Depending on outcome of previous work:

6. Undertake public consultation regarding possible changes in service levels, service delivery arrangements March / April 2009
7. Present outcomes of public consultation and proposed recommendations to Review Advisory Committee late April 2009
8. Present findings and recommendations to Board of Education late April 2009
9. Submit final report April 30, 2009