



**SERVICE DE TRANSPORT DES
ÉLÈVES
WINDSOR-ESSEX STUDENT
TRANSPORTATION SERVICES**

STRATEGIC PLAN

September 2010

1.0 INTRODUCTION

The Service de Transport des élèves Windsor Essex Student Transportation (WESTS) Strategic Plan is a dynamic document, and, therefore it is intended that this plan be the subject of continuing review. The Governance Committee is charged with the responsibility of reviewing the Strategic Plan on an annual basis making amendments and changes that are in the best interest of the organization as it transitions through the plan.

1.1 PURPOSE OF PLAN

The purpose of the plan is to establish a number of goals and objectives for the organization. A goal is a desired state which reflects the long-range purpose of the plan and is related to a major area of concern. An objective is a short-term range step towards a goal. It is concrete, realistic, action-oriented and attainable within a short period of time. The achievement of an objective should move the goal closer to reality.

1.2 BASIS OF THE PLAN

The basis of the plan arises out of the Ministry of Education Student Transportation, Leading Practices Guide, which identifies the following four areas, which will be addressed in the Strategic Directions:

- Consortium Management
- Policies and Practices
- Routing and Technology
- Contracts

The Ministry conducted an Efficiency and Effectiveness Review on the consortium in January 2010 and identified areas for improvement. The consortium received a rating of Moderate. The rating levels are: Low; Moderate Low; Moderate; Moderate High; High. The completion of a strategic plan will assist in addressing the identified areas for improvement and move the consortium to a High rating.

There are a number of issues facing student transportation that require a defined plan to ensure that the consortium is positioned to meet these objectives in an efficient and effective manner. Some of the identified issues are:

- Declining enrolment
- Separate legal entity
- Changing student demographics
- Ministry of Education initiatives (e.g. Early Learning Program)

2.0 ORGANIZATION STATUS

The Governance Committee approved a Mission Statement for the organization in October 2009 that states:

“Service de transport des élèves Windsor-Essex Student Transportation Services (WESTS) is committed to supporting the education of our students by providing safe, effective and efficient transportation”

This statement provides the vision for the organization. There is a strong commitment from the Governance Committee and staff in embracing this vision and the Strategic Plan will act as the guide to assist in fulfilling the mandate of our mission statement.

In order to move forward in a strategic manner it is important to understand the current status of the organization. A SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis provides an overview of the organization and the environment in which it is operating. This will also pinpoint specific areas and issues that need to be addressed in the plan.

2.1 STRENGTHS

WEST has operated under a consortium model since 1989. At inception the consortium provided transportation services for the Essex County School Board. In 1998 the amalgamated boards of Greater Essex County District School Board, Windsor Essex Catholic School Board and the Conseil scolaire de district des écoles catholiques du Sud-Ouest joined together to access transportation services through the consortium, with Le conseil scolaire de district du Centre-Sud-Ouest purchasing transportation under an agreement. The existing consortium model comprised of all four coterminous boards was formed in 2008.

This long history has provided the organization with a solid understanding of the requirements of working with coterminous boards and the need to rationalize transportation services to reduce transportation costs.

The staff of the organization continues to be one of the major strengths with over 114 years in transportation experience and 57 years specifically with school bus administration. Although there were several new staff, including the General Manager, added in 2009, there has been great strides in moving to a professional and organized operation. Policies and procedures have been developed and processes have been implemented that streamline work functions and ensure efficiencies in the provision of service.

The relationship between the four coterminous boards is also a source of strength for the organization. The governance of the consortium is operationalized through the members of the committee who are all Superintendents' of Business and bring many years of experience in dealing with student transportation. This level of leadership provides the support to the organization to successfully implement sound business practices.

The transportation software, Georef, is another major contributor to the success of the organization. This tool has allowed the consortium to increase the efficiency of routing and ensure that students can be provided with the appropriate transportation on a timely basis.

The final identified strength is the relationship between the direct service providers, bus operators, and the consortium. The programs that have been developed in conjunction with the operators such as First Ride, Bus Patrol Training and recognition as well as driver training are concrete examples of the shared goal of providing excellent transportation service. The consortium recently negotiated a two year agreement with the bus operators which will provide stability for both parties as we embark on the Request for Proposal process in 2012/13.

2.2 WEAKNESSES

Although the consortium has been operating for a long period of time in this area it is only in the last few years that the Ministry of Education has supported and identified the need to provide transportation through this model. They have identified Leading Practices for the operation of transportation consortia and have and continue to conduct Efficiency and Effectiveness reviews to assess consortia and provide direction. These reviews also impact funding, based on the review rating. An area of weakness for the consortium is that these Leading Practices have not been fully implemented as the new organizational structure has only been in place for over a year as well as the change to the new software which occurred late in the 2008/09 school year.

A significant barrier for the organization is the lack of a Separate Legal Entity Status. The consortium operates as a quasi-independent organization with no defined status. The consortium is experiencing some human resource issues that can threaten the stability of the organization due to the lack of a separate legal entity. There needs to be agreement from the coterminous boards regarding this direction.

2.3 OPPORTUNITIES

There are a number of initiatives that are being presented by the Ministry of Education that present opportunities for the consortium to improve operations. The Leading Practices that have been developed can be utilized to ensure an improved organizational structure.

The partnering with the Ministry of Education in the third stage of the pilot project for the Request for Proposal offers the opportunity to develop a stable service delivery model as well as improved service levels.

The Georef software offers opportunities for efficiencies in routing as well as providing tools for analyzing service delivery so that improvements can be made both in routing and operational tracking. The ability to integrate our bus operator contracts in the

software offers a tool for tracking operator performance and ensures greater accuracy in billing.

2.4 THREATS

The changing environment which includes declining enrolment, school closures and the shift in the demographics of areas of Windsor Essex County require ongoing changes to the transportation service delivery. The need for a strong organizational structure to meet these challenges is required. This threat is increased by the consortium's lack of a separate legal entity status.

3.0 SCOPE OF THE PLAN




The scope of the strategic plan is to establish a general framework within which the delivery of transportation can be provided. This framework includes a focus on long term strategic directions that assign priorities and recommendations for the implementation of sustainable mechanisms for service delivery.

The directions will be focused on organizational structure, well defined policies and procedures, routing and technology solutions and well developed key stakeholder relationships. The plan will be based on the current environment but will position the consortium to be able to address future changes.

The Strategic Directions will be evaluated on an ongoing basis. A measurement tool has been developed to allow the Governance Committee to evaluate the progress of the consortium and keep the organization focused on the goals and objectives.

4.0 STRATEGIC DIRECTIONS

The Strategic Directions will be set out in the following categories:

-  Customer Service
-  Fiscal Responsibility
-  Continuous Improvement

4.1 CUSTOMER SERVICE

The customers for the consortium can be categorized as follows:

- Students/Parents
- Boards
- Schools/Principals
- General Public

In order to provide excellent customer service we need to ensure that we know our customers and understand their needs, that we are accessible to our customers and that

our service meets our customers' expectations.

STRATEGIC DIRECTIONS - CUSTOMER SERVICE

1. Develop a strong working relationship with all our customers.
2. Develop a communication strategy that recognizes the diversity of our customers and key stakeholders.
3. Provide a first class transportation experience for all WESTS customers.

4.2 FISCAL RESPONSIBILITY

A critical component for the consortium is the fiscal responsibility. The challenges with funding in the face of declining enrolment as well as other Ministry of Education initiatives require increasing due diligence to ensure that the transportation funds are being expended in the most efficient manner.

STRATEGIC DIRECTIONS - FISCAL RESPONSIBILITY

1. Implement the Leading Practices as identified in the Efficiency and Effectiveness review to improve the rating.
2. Utilize functions in the Georef software to improve efficiencies and track operational costs more effectively.
3. Develop and rollout automated financial reports to track actual costs.

4.3 CONTINUOUS IMPROVEMENT

An ongoing process is required to continuously develop processes and procedures that increase the efficiency and effectiveness of the service delivery. The major factor in implementing a continuous improvement process will be the separate legal entity status for the consortium.

STRATEGIC DIRECTIONS - CONTINUOUS IMPROVEMENT

1. Pursue the separate legal entity status.
2. Develop a review process for the operational and administrative functions.

5.0 GOALS & OBJECTIVES

The strategic directions have established the general framework and the goals and objectives will establish the priorities and recommendations to implement the strategic directions. There will be overlap in the long term and short term goals and objectives as these goals and objectives assist in meeting more than one strategic direction.

5.1 CUSTOMER SERVICE

STRATEGIC DIRECTION	LONG TERM GOAL	SHORT TERM GOALS & OBJECTIVES
<p><i>Develop strong working relationships with all our customers</i></p>	<p>Develop a culture of professionalism and ensure the work environment is able to attract competent and skilled employees.</p> <p>Ensure that operators meet the Key Performance Indicators as identified by the Consortium.</p>	<p>Annual performance reviews will be completed with all staff allowing them the opportunity for input into their professional development and training.</p> <p>Address office equipment needs both for the improved morale as well as a preventative measure for health and safety issues.</p> <p>Cross train employees so that staff are able to develop additional skills.</p> <p>Complete audits of operator service in each category a minimum of once per year. Analyze operator reports from Georef quarterly. Identify deficiencies and work with operator to implement a plan to address the issues.</p>
<p><i>Develop a communication strategy that recognizes the diversity of our customers and key stakeholders.</i></p>	<p>Ensure comprehensive documentation of all policies, procedures and practices.</p> <p>Ensure the www.buskids.ca website provides comprehensive information in a user friendly environment.</p> <p>Ensure that school administrations are</p>	<p>Continue to update and develop policies and procedures for all administrative and operational practices.</p> <p>All approved policies and procedures will be updated on the website.</p> <p>Conduct an annual review of the website layout and functionality.</p> <p>Updates regarding the status of transportation will be sent</p>

	<p>informed on a timely basis regarding any transportation issues.</p>	<p>out to the schools during the September start up each year and any changes that take place during the school year will be communicated to the schools through email.</p>
<p><i>Provide a first class transportation experience for all WESTS customers.</i></p>	<p>Ensure that all school loading zones are safe and provide efficient loading of students.</p> <p>Participate in boundary reviews to ensure that the transportation requirements are considered.</p> <p>Ensure the bus operators meet the requirements of the contract and provide a superior level of service.</p> <p>Provide programs that promote a safe and enjoyable transportation experience for students.</p> <p>Develop benchmarks for performance for staff, operators and service.</p>	<p>Meet with school staff at schools identified as having bus loading issues to problem solve. Provide feedback for new school sites for appropriate bus loading facilities.</p> <p>Develop a list of areas that have boundaries that have been contentious with respect to transportation for each of the coterminous boards for their review.</p> <p>Conduct surveys to gather feedback on operator service levels. Review incidents/accidents of each operator to identify trends and possible problem areas on an annual basis.</p> <p>Incorporate tenets of excellent customer service in the Request for Proposals for service for the 2012/13 school start up.</p> <p>Continue to review and update the safety program for both students and operators, including a pilot project “Peaceful School Bus”.</p> <p>Identify levels of service requirements for operators and include in the RFP document.</p>

		Include benchmarks for optimization of routing for the Route Planners and include the review of actual performance to benchmarks on their annual performance reviews.
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5.2 FISCAL RESPONSIBILITY

STRATEGIC DIRECTION	LONG TERM GOAL	SHORT TERM GOALS & OBJECTIVES
<i>Implement the Leading Practices as identified in the Efficiency and Effectiveness review to improve the rating.</i>	To implement the Leading Practices as identified by the Ministry of Education.	Continue to update and develop policies and procedures based on the Leading Practices document.
	To receive a High rating on the Efficiency & Effectiveness review from the Ministry of Education.	Develop and implement a plan to address the issues identified in our E&E review including pursuit of a Separate Legal Entity status.
<i>Utilize functions in the GEOREF software to improve efficiencies and track operational costs more effectively.</i>	Utilize the software to produce invoices for all transportation services.	Work with GEOREF to develop the invoice module. Add Public Transit, taxi and parent driver contract information to the GEOREF system.
	Utilize optimization functions to increase efficiencies in routing.	Optimization of all routes will take place in March each year.
	Bell times will be reviewed to determine optimum timing for the most efficient routing.	Bell times will be reviewed in February for implementation the following September.
<i>Develop and rollout automated financial reports to track actual costs.</i>	All financial information would reside with the banker board allowing for more accurate reporting of financial information.	Pursuing the separate legal entity to eliminate staffing coming from two different boards. Work with GECD SB finance staff to streamline

		<p>accounts for more user friendly reporting.</p> <p>Continue to report financial information to the Executive Transportation Committee on a quarterly basis.</p> <p>Develop a budget process that is comprehensive and captures the issues from each of the coterminous boards.</p>
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5.3 CONTINUOUS IMPROVEMENT

STRATEGIC DIRECTION	LONG TERM GOAL	SHORT TERM GOALS & OBJECTIVES
<i>Pursue separate legal entity status.</i>	Achieve separate legal status.	Bring recommendation to move to separate legal entity status to the individual boards
<i>Develop a review process for the operational and administrative functions.</i>	<p>Annual review of the strategic plan document.</p> <p>Annual review of all policies and procedures.</p>	<p>Bring forward the Strategic Plan to the Governance Committee on an annual basis for review.</p> <p>Calendarize all policies and procedures for review and bring forward amendments for approval at the ETC meeting.</p>

6.0 IMPLEMENTATION OF PLAN

The Draft Strategic Plan has been shared with staff for input and comment. Upon approval by the Governance Committee the plan will be shared with staff and key stakeholders to ensure that the objectives are understood.

The goals and objectives will be included in work plans and staff meetings to ensure all parties are working toward the common goals.

7.0 MEASUREMENT OF GOALS AND OBJECTIVES

The ultimate responsibility for ensuring that the goals and objectives are implemented is with the General Manager. The General Manager will bring forward the goals and objectives to be reviewed by the Governance Committee on an ongoing basis to measure progress and identify areas of concern. Reporting time frames will be as follows:

Long Term Goals	once per year
Short Term Goals & Objectives	2 times per year

The following template will be utilized when reporting to the Governance Committee. The information will allow the Committee to determine if the action is appropriate to meet the goals and objectives, what resources are required and if the deadlines are being met.

REPORT TEMPLATE

Goal & Objective	Action Required	Resources Required	Status	Time Frame	On Target (Y/N)

8.0 CONCLUSION

The Strategic Plan is a fluid document that will be amended to adjust to changes in the environment. This document lays out the framework structure to allow for the consortium to operate within the parameters as approved by the Governance Committee.

Approved by Governance Committee, Motion GC-10-02, dated September 15, 2010.