



Memorandum

Date: January 31, 2020
To: Planning and Facilities Committee
From: Ryan Stierman, Secretary-Treasurer/CFO

Information Item: Transportation Task Force Steering Committee Recommendations

1.0 RELEVANT BOARD MOTION/DIRECTION

Public Board Meeting – February 27, 2019

Main 19P-031 as Amended by Amendment 19P-034

THAT: The Board of Education strike a Transportation Task Force to review the District's transportation service and bring back recommendations by April 30, 2019 for implementation in the 2019-2020 school year;

AND THAT: The Transportation Task Force bring back all other recommendations by January 31, 2020 for implementation in the 2020-2021 school year.

Public Board Meeting – March 13, 2019

Main 19P-043

THAT: The Board of Education approve the Transportation Task Force Terms of Reference, as attached to the Agenda, and as presented at the March 13, 2019 Public Board Meeting.

2.0 BACKGROUND

Formed in the 2018-2019 school year in response to increasing community demands and unsustainable cost increases in Transportation, the Transportation Task Force Steering Committee was established by the Board of Education to make recommendations to create a sustainable transportation system that better meets the needs of the community.

As part of its work, the Transportation Task Force Steering Committee conducted a comprehensive community consultation that consisted of two surveys and five public consultation sessions. With over 3,500 responses and over 100 parents that attended the public sessions, the Committee was provided with a significant feedback to develop its recommendations.

All of the timelines, presentations and survey results for the Committee's work is published on the [Transportation Review Website](#).

The Steering Committee is recommending the changes as summarized in Appendix A:

- Increase of the Transportation Charge to \$450.00
- Changes to 425R – STUDENT FEES (Appendix B)
- New 470R – TRANSPORTATION SERVICES MANAGEMENT (Appendix C)

3.0 NEXT STEPS

Date	Action
February 5, 2020	Recommendations reviewed and recommended to the Board of Education as presented or amended by the Planning and Facilities Committee (Public Meeting 6:00 PM at School Board Office)
February 12, 2020	The Board of Education reviews and approves the recommendations of the Planning and Facilities Committee as presented or amended. (Public Meeting 6:00 PM at School Board Office)
February 13, 2020	Final decision and information package sent out to all parents
February 17, 2020	Registration opens for busing service

4.0 INFORMATION STATEMENT

Per the analysis below the proposed \$450 fee will:

- Provide funding for inflation (2% wage increase, higher insurance and fuel costs expected)
- Provide funding for the operating and potential capital costs for the expected 5 additional routes due to lower eligibility limits.

	Projected 30-Jun-19	Proposed 30-Jun-20
Riders	5,554	5,792
Unpaid	(773)	(773)
Subsidies	(673)	(873)
Net Fees Paid	4,108	4,146
Rate	\$ 225	\$ 450
Busing Fees	\$ 924,300	\$ 1,865,700
Busing Funding	\$ 600,000	\$ 600,000
Total Revenue	\$ 1,524,300	\$ 2,465,700
Total Operating Costs	\$ 4,684,429	\$ 5,128,118
Shortfall	\$ (3,160,129)	\$ (2,662,418)
Operating Funding Supplement	\$ 3,160,129	\$ 2,662,418
Funding per rider		
Fees	\$ 166.42	\$ 322.12
Funding	\$ 108.03	\$ 103.59
Operating Subsidy	\$ 568.98	\$ 459.67

5.0 SECRETARY-TREASURER/CFO'S COMMENTS

The Transportation Task Force Steering Committee has authentically listened to the feedback received from the community and believes the recommend changes to the transportation system will better meet the needs of the community and allow for a more sustainable transportation system.

6.0 STEERING COMMITTEE'S RECOMMENDATIONS:

THAT: The Planning and Facilities Committee recommends to the Board:

THAT: The Board of Education set the transportation fee to \$450/year for each bus rider for the period effective July 1, 2020 to June 30, 2021.

THAT: The Board of Education approves the amendments to Regulation 425R – Student Fees (Regulations), as attached to the Agenda and presented at the February 5, 2020 Planning and Facilities Committee Meeting.

THAT: The Board of Education approves the rewrite to Regulation 470R – Transportation Services Management (Regulation) Guiding Principles for Transportation in Central Okanagan Public Schools, as attached to the Agenda and presented at the February 5, 2020 Planning and Facilities Committee Meeting.

7.0 APPENDICES

- A. Summary of Significant Recommendations
- B. Amended 425R – Student Fees (Regulations)
- C. Rewritten 470R – Transportation Services Management (Regulation) Guiding Principles for Transportation in Central Okanagan Public Schools
- D. Current 470R – Transportation Services Management (Regulation) Guiding Principles for Transportation in Central Okanagan Public Schools



TRANSPORTATION RECOMMENDATIONS

<u>WHAT WE'VE HEARD</u>	<u>OUR RESPONSE</u>
Parents need to be notified of their seat status earlier so they can make arrangements.	<ul style="list-style-type: none">• Deadline of May 31 to register for busing.• Any eligible applications after May 31 will be provided a seat if there are seats available.• Any applications made by the deadline will be informed of their status by July 31.
Eligibility distances need to be reviewed to reflect the age of students and challenges with topography.	<ul style="list-style-type: none">• Eligibility limits lowered for elementary (3.0 km) and middle school students (3.6 km).• More stops established in areas with challenging topography than flat areas to reflect more difficult walking conditions.• Limit remains at 4.8 kms for secondary school students.
Courtesy seat assignment should be prioritized based on distance and age.	<ul style="list-style-type: none">• Courtesy seats are those seats not required for eligible riders.• Courtesy seats are first allocated to elementary school and middle school students.• Distance continues being the main determining factor.• Other criteria such as grade and timestamp have been added when distance is the same.
Public transit is a viable option for secondary school students, if there is adequate service available.	<ul style="list-style-type: none">• No areas will be defined as having adequate service for the 2020/21 school year.• The District will work with BC Transit and if an area has sufficient public transit service to support secondary school transportation, the District will redirect resources to support other areas.• District staff will continue to collaborate with BC transit to create better transit opportunities for secondary students.
Fees should increase to cover a greater share of costs and/or increase service	<ul style="list-style-type: none">• Fees are recommended to increase to \$450 per year.• This amount matches the amount charged for youth to ride transit for 10 months. All students that require busing will pay the same amount.• This amount will generate between \$900,000 and \$1,000,000 to cover the anticipated costs to implement the new eligibility limits in the first year and to reduce the operating subsidy in future years.• This amount increases the family's portion of transportation costs to 48%.
A family's situation should be considered when setting policy on fees.	<ul style="list-style-type: none">• Continue to provide multiple student discounts of 50% for the 3rd and 4th child and no charge for the 5th and additional children in a family.• Allow for payment plans for the transportation charge through the District's fee system.• Allow parents to apply for a fee subsidy under low income thresholds.
Busing for schools and programs of choice should remain status quo.	<ul style="list-style-type: none">• No changes are being proposed to busing for schools or programs of choice.• Busing will continue to be provided if the program is at the student's English catchment school.



Policies And Procedures

Section Four: Students*“Together We Learn”***425R – STUDENT FEES**

Schools may assess and collect the goods and services fees, distinct schools, unique programs and specialty academy fees, rentals, deposits, and charges described below, providing that the ability to pay is not a prerequisite to taking an educational program and that the charge is not for an activity that directly relates to achieving the prescribed learning outcomes of a course or program except where permitted by legislation. All goods, services, distinct schools, unique programs and specialty academy fees and supplies referred to in these Regulations shall be optional to students. The financial hardship Policy (section 8) applies to all student fees.

The Board may assess and collect a Student Transportation Charge for students requesting access to the District transportation system.

Interpretation

For the purpose of these Regulations:

Goods and Services

Include but are not limited to:

- Materials and equipment of a nature, or of a quality or quantity, beyond that which is necessary to meet the required outcomes or assessment requirements of an educational program,
- Paper, writing tools, calculators other than graphical calculators, student planners, exercise books, computer storage media and other school supplies and equipment for a student's individual use,
- The provision of a musical instrument for a student's individual use, and
- The payment of expenses in respect of field trips or special events including expenses for transportation, accommodation, meals, entrance fees and equipment rentals.
- Student bus passes or replacement bus passes.

Student Transportation Charge

Representing a portion of the cost to transport the student to and from school as per Policy 470.

Supplies

Items which are purchased and used personally by the student; (examples: school supplies available through the bulk purchase plan, gym strip, exercise books, binders, loose-leaf refills, blank computer diskettes, home economics and technology education projects)



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<i>Educational Resource Materials</i>	Information, represented or stored in a variety of media and formats, that is used for instruction in an educational program and materials and equipment necessary to meet the learning outcomes or assessment requirements of an educational program provided by the Board of Education.
<i>Musical Instruments</i>	School District owned musical instruments used in the curricular and extracurricular school-based music programs.
<i>Merchandise</i>	Merchandise of a non-educational nature available through the schools for the benefit of its students (examples: personal foods and beverages, T-shirts and book fairs).
<i>Activities</i>	Optional activities of a non-educational or supplemental nature that are made available through the schools for the benefit of students (example: co-curricular programs).
<i>Distinct School</i>	A school that provides a curriculum with a specific school-wide educational focus (e.g. traditional or fine arts), or creates a unique school identity (e.g. mandatory uniforms).
<i>Unique Program</i>	A program that fulfills a recognized educational need separate from existing programs and services, but within the parameters of provincially prescribed and/or Board authorized curriculum, and provides educational options for students, parents and staff (e.g. International Baccalaureate, Advanced Placement or Elementary/Middle School Okanagan Language).
<i>Specialty Academy</i>	An educational program that emphasizes a particular sport, activity or subject area, and meets the prescribed criteria set out in the regulations (BC Ministry of Education Specialty Academy Criteria Regulation 219/08 dated October 15, 2009).

1. Goods and Services and Supplies

The Superintendent of Schools may approve the charging of specific fees and levies to students for goods and services and supplies not normally provided free-of-charge by the district's schools.

2. Student Transportation Charge

The Board may approve the charging of a portion of the cost to transport the student to and from school as per Policy 470.



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3. Educational Resource Materials

Secondary and middle schools may require a deposit (caution fee) for equipment or materials on the following basis:

- 3.1 individual fee
- 3.2 family fee

Upon the return of such equipment or materials in working order and good condition, all of the deposit shall be refunded to the student.

4. Activity Charges

Schools may collect an activity charge (student council/supplemental field trips/extra-curricular activities/cultural performance) providing the charge for the activity or resources does not relate directly to a prescribed outcome. Also, alternative activity must be provided to non-participating students. Activity charges should be on a cost-recovery basis or, where common among schools, shall be applied consistently and shall reflect reasonable cost recovery.

5. Approval and Publication

- 5.1 Applications for the charging of goods and services fees activity charges, and the requiring of deposits referred to in subsections 1 to 3 above, shall be submitted to the Superintendent of Schools or his designate for approval.
- 5.2 Upon receiving approval of the applicable goods and services fees, student transportation charge, charges, and deposits, each school shall publish a schedule of such fees, charges and deposits, and shall make the schedule available to students and children registered under Section 13 of the School Act, and to the parents of those students before the beginning of the school year.

6. Merchandise and Activities

6.1 Merchandise:

Schools will be free to sell a wide range of merchandise beyond the Goods and Services and supplies, a general list of such known merchandise must be approved by the principal and filed with the office of the Superintendent of Schools or his designate for information purposes.

6.2 Band instruments:

Schools may charge a nominal fee (below market rate) for the rental of School District owned band instruments. The rental fee will be established by the school principal.

6.3 Activities:

Although schools will be free to undertake a number of activities beyond those required in the educational program, a list of such known activities with estimated



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charges is to be approved by the principal and filed with the office of the Superintendent of Schools or his designate for information purposes.

6.4 **Specialty Academy Fees:**

A school may charge a fee for an authorized academy to recover supplementary instruction and resource costs (e.g. professional coaches, facility rentals) provided that Academy and associated fees are approved by the school's School Planning Council on a yearly basis. Authorized Secondary School Apprenticeship specialty academies and Dual Credit Program specialty academies may charge for tools, equipment and materials directly related to the academy.

7. **Accounting**

All monies collected and distributed by a school are public funds and are subject to an audit by the office of the Secretary-Treasurer.

7.1 Proper accounting procedures shall be maintained at each school.

7.2 The principal shall be responsible for authorizing all expenditures.

7.3 Separate accounts shall be maintained for each approved specialty academy.

8. **Financial Hardship**

8.1 Principals shall annually notify parents through newsletters, notices to parents, and at the time of registration, that a student will not be excluded from any educational program due to financial hardship.

8.2 Principals shall facilitate participation in courses by fully or partially waiving the schedule for payment of goods, services, supplies, project fees, distinct schools, unique programs, specialty academies and charges for students unable to pay because of financial hardship. Where fees are fully or partially waived, the principal may explore with the student options to recover the fees through school-sponsored fundraising, other school funds or community sources. Parents of other participating students are not expected to fund financial hardship.

8.3 Principals shall facilitate exemption requests for the student transportation charge by meeting with the parents seeking the exemption and completing the student transportation fee Subsidy Request form. The form must be submitted confidentially to the Secretary-Treasurer for final approval.

8.4 Parents may also submit exemption requests directly to the Secretary-Treasurer should they qualify under income thresholds.



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- 8.5 Principals are directed to establish a procedure in each school which will allow for the private and confidential consideration of financial circumstances of individual students and families. Such procedures will preserve the dignity of families who may be unable to pay.

AMENDMENT



Policies And Procedures

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**470R – TRANSPORTATION SERVICES MANAGEMENT
(REGULATIONS)**

**GUIDING PRINCIPLES for TRANSPORTATION
in Central Okanagan Public Schools**

Registration

- 1) A student must be registered and have a seat assigned in order to ride the school bus. Registration will be available online year-round.
- 2) Priority registration shall be open in the spring and until May 31 for the upcoming school year. Applications made after May 31 for students deemed to be eligible riders shall be accommodated if there is a seat available.

Eligible Riders

- 3) An Elementary school student will be considered eligible for transportation if their home address is at least 3.0 km from the school or schools designated for the catchment area (measured as actual driving distance).
- 4) A Middle school student will be considered eligible for transportation if their home address is at least 3.6 km from the school or schools designated for the catchment area (measured as actual driving distance).
- 5) A Secondary school student will be considered eligible for transportation if their home address is at least 4.8 km from the school or schools designated for the catchment area (measured as actual driving distance) and the student does not live in a neighborhood deemed to have adequate transit service.
- 6) If a student meets the criterion for eligibility distance after being placed by the District at a school other than their catchment area school(s), the student will be given the same consideration and priority as other eligible students. These students will only be designated as “redirected” students by the appropriate Assistant Superintendent.
- 7) Special Education students identified by the Student Support Services Department as requiring a specially equipped bus will be considered as eligible students.



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Courtesy Riders

- 8) Courtesy seats shall not be provided to students who reside less than 2.0 km from their catchment school.
- 9) Seats that are not required for eligible students on school bus routes will be made available to Elementary and Middle school students as courtesy riders based on the following criteria on a route by route basis:
 - a) Furthest home to school distance
 - b) If distance is the same, grade level
 - c) If distance and grade level are the same, application date and timestamp
- 10) Seats that are not required for eligible students and Elementary and Middle School courtesy riders on school bus routes will be made available to secondary students who reside in a neighborhood not deemed to have adequate transit service as courtesy riders based on the furthest home to school distance. If distance is the same, application date and timestamp will be used.
- 11) In the case of a student residing with parents or caregivers in more than one home, one address will be accepted for eligibility purposes. However, where possible, consideration will be given to an alternate stop on the same route or a courtesy seat on another route within the same catchment, if a parent submits an application and provided there are no remaining courtesy applications on that route. A transportation charge will be assessed for each route assigned.
- 12) Transportation will not be provided to a school or program of choice outside a student's English catchment area unless approved by the Board (e.g. French Immersion or locally developed courses).

Conduct

- 13) Students must abide by their school's Code of Conduct expected of all riders.

Routes

- 14) School bus routes are established on the basis of safety and efficiency of service for students who meet the criteria for eligibility.
- 15) Route changes must be approved by the Director of Operations or delegate.



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- 16) A minimum of fourteen (14) eligible students is required for the establishment of a bus route.
- 17) Where possible, routes will be designed to minimize the time students spend on a bus with an upper limit of 60 minutes as a guideline.
- 18) Where reasonable, a bus driver will be assigned to the morning and afternoon routes for a given run.

Fees and Payments

- 19) Eligible riders and courtesy riders registered on bus routes must pay the student transportation charge; however, Board Policy 425 – Student Fees and 425R – Student Fees (Regulations) is in place for those families who are experiencing financial hardship and are unable to pay the transportation charge.
- 20) Families with more than two children assigned to a bus will receive a 50% subsidy of the Student Transportation Charge for the third and fourth child assigned to a bus and a 100% subsidy of the Student Transportation Charge for the fifth and any additional children who are assigned on a bus.
- 21) The student transportation charge is to be paid or payment arrangements setup in the District's fee system and all past due school and transportation fees must be paid prior to a student being provided a bus pass.
- 22) Failure to pay the transportation charge or follow payment arrangements may result in the removal of service.
- 23) If an eligible rider or courtesy rider discontinues using the transportation service prior to March 31 of any year, a prorated refund will be issued upon request and once the bus pass is surrendered to the School District. The refund will only cover the months after the month in which the pass is surrendered. No refunds will be issued after March 31.
- 24) The student transportation charge will be communicated each year in accordance with Policy 425 – Student Fees
- 25) Students will not ride the bus unless they have received a valid bus pass.
- 26) Additional Service Routes – If approved by the Board, parent requested routes will be charged the actual cost of the route. Approval by the Board is required on an annual basis.



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Transportation Assistance Payments

- 27) If there are less than fourteen (14) eligible students for a bus route, the individual providing transportation of the student(s) to the catchment school may be eligible for transportation assistance payment based on mileage from the home address to the school.
- 28) Transportation assistance payments described in the above guideline are calculated at the rate of 60% of the rate paid to staff for personal use of vehicles for Board business, based in one round trip per day, for the days on which the student(s) attend(s) school. To a maximum of \$625 per year, per family. This annual maximum transportation assistance rate will be adjusted as the five (5) year average cost/student changes.
- 29) If a family has more than one student attending a given school, only one transportation assistance payment will be made.
- 30) If transportation or a transportation assistance payment is provided on behalf of a student on the wait list for their catchment area school and the invitation to return mid-year is declined in favour of a September entry, school bus transportation or the transportation assistance payment will be continued for the balance of the current school year. However, if the student remains at this school in the following year the student transportation charge will apply or transportation assistance payments will be discontinued.



Policies And Procedures

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**470R – TRANSPORTATION SERVICES MANAGEMENT
(REGULATIONS)**

**GUIDING PRINCIPLES for TRANSPORTATION
in Central Okanagan Public Schools**

Rider Eligibility

- 1) A student must be registered as an eligible or courtesy rider in order to ride the school bus. Registration will be available online year round.
- 2) A student will be considered eligible for subsidized transportation if his or her home address is at least 4.0 km (Elementary) or at least 4.8 km (Middle/Secondary) from the school or schools designated for the catchment area (measured as actual shortest driving or walking distance).
- 3) If a student meets the criterion for home-school distance after being placed by the District at a school other than his or her catchment area school(s), the student will be given the same consideration as other eligible students. These students will only be designated as “capped” students by the appropriate Assistant Superintendent.
- 4) Seats that are not required for eligible students on school bus routes will be made available to courtesy riders based on the criterion of furthest home to school distance. Courtesy ridership is subject to cancellation at any time, with a one-week notice, based on the receipt of an application for the transportation for a newly identified eligible student living within the catchment area.
- 5) In the case of a student residing with parents or caregivers in more than one home, one address will be accepted for eligibility purposes. However, where possible, consideration will be given to an alternate stop on the same route or a courtesy seat on another route within the same catchment if a parent submits an application.
- 6) In situations in which a student in Kindergarten through Gr. 3 qualifies as an eligible or courtesy rider and an older sibling travelling to the same school does not, the older sibling will be given courtesy riding privileges on the same bus if space permits.
- 7) In the event that students with courtesy riding privileges have to be displaced due to the registration of eligible students living further from the school, the first criterion for priority will be distance from the school and the second criterion will be the accommodation of an older sibling travelling with a younger student. Ties will be broken in favour of the youngest student.
- 8) Transportation will not be provided to a school elective program outside a student’s catchment area (e.g. French Immersion or locally developed courses).



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Conduct

- 9) Students must abide by their school’s Code of Conduct expected of all riders.

Routes

- 10) School bus routes are established on the basis of safety and efficiency of service for students who meet the criteria for eligibility.
- 11) Route changes must be approved by the Director of Operations or delegate.
- 12) A minimum of fourteen (14) eligible students is required for the establishment of a bus route.
- 13) Where possible, routes will be designed to minimize the time students spend on a bus with an upper limit of 40 minutes as a guideline.
- 14) Where reasonable, a bus driver will be assigned to the morning and afternoon routes for a given run.
- 15) Where reasonable, bus stops at sites other than school sites will have 15 or fewer students.
- 16) Where reasonable, routes will be planned so that students are able to travel without having to transfer from one bus to another in a single direction.

Fees and Payments

- 17) Eligible riders and courtesy riders registered on bus routes must pay the student transportation charge; however, Board Policy 425 – Student Fees and 425R – Student Fees (Regulations) is in place for those families who are experiencing financial hardship and are unable to pay the transportation charge.
- 18) Special Education students identified by the Student Support Services Department as requiring a specially equipped bus will be considered as eligible students.
- 19) Families with more than two children assigned to a bus will receive a 50% subsidy of the Student Transportation Charge for the third and fourth child assigned to a bus and a 100% subsidy of the Student Transportation Charge for the fifth and any additional children that are assigned on a bus.
- 20) Once the Board has established a student transportation charge for a year of service, a minimum 50% of the charge must be paid by June 30th of the year prior to the year of service, and the charge must be fully paid by October 15th of the year of service.
- 21) If there are less than fourteen (14) eligible students for a bus route, the individual providing transportation of the student(s) to the catchment school may be eligible for transportation assistance payment based on mileage from the home address to the school.

- 22) Transportation assistance payments described in the above guideline are calculated at the rate of 60% of the rate paid to staff for personal use of vehicles for Board business to a maximum of 100 kilometres per day, based in one round trip per day, for the days on which the student(s) attend(s) school. To a maximum of \$625 per year, per family. This annual maximum transportation assistance rate will be adjusted as the five (5) year average cost/student changes.
- 23) If a family has more than one student attending a given school, only one transportation assistance payment will be made.
- 24) If transportation or a transportation assistance payment is provided on behalf of a student on the wait list for his or her catchment area school and the invitation to return mid-year is declined in favour of a September entry, school bus transportation or the transportation assistance payment will be continued for the balance of the current school year. However, if the student remains at this school in the following year the student transportation charge will apply or transportation assistance payments will be discontinued.
- 25) Students must be registered and assigned to a route by the Transportation Department before the student transportation charge will be accepted.
- 26) The student transportation charge is to be paid before the bus pass will be issued.
- 27) Students added to a route midyear will be required to pay for the current and remaining months before the pass will be issued.
- 28) A current identified eligible student who does not register by the established new year registration date and has not submitted the student transportation charge by the cut-off date will not be eligible to 'bump' a courtesy rider. Upon registration such a student will be placed at the top of the waiting list for the next available seat.
- 29) If a courtesy rider is 'bumped' by a newly identified eligible rider, the courtesy rider will receive a refund pro-rated from the last day of service.
- 30) If an eligible rider or courtesy rider discontinues using the transportation service prior to March 31 of any year, a prorated refund will be issued upon request and once the bus pass is surrendered to the School District. The refund will only cover the months after the month in which the pass is surrendered. No refunds will be issued after March 31.
- 31) The student transportation charge and lost and damaged bus pass charge will be communicated each year in accordance with Policy 425 – Student Fees
- 32) Students will not ride the bus unless they have been registered, have paid the student transportation charge and have received a valid bus pass.
- 33) Additional Service Routes - parent requested routes will be charged the minimum of the student transportation charge or actual cost if higher than the student transportation charge.