

# CBE Master Transportation Strategy Engagement Roadmap



Calgary Board  
of Education

*dialogue)))*

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## 1. CONTEXT

The CBE made changes to transportation service levels for some elementary and junior high school students for the start of the 2015-16 school year, which resulted in these students travelling further than 1.6 and 1.8 km from home to their bus stop. Concerns were raised by the affected families that the new travel distances were not appropriate. As a result, the CBE took the necessary steps to ensure that all students riding yellow school buses would be accessing stops in alignment with the travel distances of 1.6 and 1.8 km for elementary and junior high students. It was recognized at the time the decision was made that these changes represented a one-year solution. In an October 15, 2015 Report to the Board of Trustees, it was stated that “The CBE will continue to be challenged to balance the cost of transportation with the level of fees and service expectations (i.e. ride times and travel distances to bus stops) within the current provincial government funding model. CBE administration is committed to working with all stakeholders in the development of a sustainable, long term transportation strategy.”

## 2. THE PROBLEM

The CBE’s current level of transportation services exceeds the available budget. The gap between provincial funding provided for transportation and the expected transportation costs for the 2016-17 school year at current service levels is expected to be approximately \$13.2 million.

## 3. WHAT IS TO BE DECIDED?

The CBE must deliver transportation services that are sustainable into the future. It is acknowledged these changes will require up to three years to implement. As a responsible steward of public funds, the CBE makes budgeting decisions that affect students and their families. Some of these decisions involve difficult choices and so the CBE has decided that:

*By early summer, the Calgary Board of Education will have consulted with parents, students, staff and other stakeholders to establish a Master Transportation Strategy (MTS) that outlines changes to CBE transportation services and/or fees in order to establish financial sustainability.*

## 4. DECISION MAKER

CBE Superintendents’ Team

The CBE receives most of its funding from the Alberta Government. With that funding, the CBE prepares a budget (which includes transportation services) each year that is approved by the Board of Trustees. Trustees will be updated on a regular basis on the progress of this engagement and the decision-making process.



## 5. PURPOSE OF ENGAGEMENT

The purpose of engaging stakeholders as part of the transportation strategy development process is to work directly with parents, students, staff and other stakeholders in order to ensure a safe, reliable and cost-efficient program. Specifically, the expected 2016-17 budget gap must be closed.

A recent technical review by School Bus Consultants has found that the budget gap cannot be closed through operational efficiencies. This means there are three possible areas where adjustments could help close the gap: transportation service levels, user fees and government funding. The CBE will work directly with stakeholders to develop options that close the gap. All options must ensure student safety is protected.

Aspects of transportation services that will be considered within the engagement and potentially changed include:

- a. Travel distances from student's home to the bus stop (calculated as a walking distance)
- b. Bus ride time
- c. Eligibility for ridership (considers age, program affiliation and other factors)
- d. Bell times
- e. Number and location of pick-up stops
- f. Access to waivers
- g. User fees
- h. Two-year or three-year implementation plan for changes
- i. Low ridership routes

## 6. GIVENS

Givens are those aspects of strategy development that are outside the scope of engagement, which means they are not negotiable. The givens for this engagement will include the following:

- a. minimizing or eliminating the learning dollars spent to subsidize transportation services
- b. transportation for students with complex learning needs<sup>1</sup>

<sup>1</sup> "Complex learning needs" means physical, medical or social/ emotional needs that require support for transportation



## 7. STRATEGY

There are several time pressures affecting this engagement, principally collecting input in sufficient time for analysis and consideration for route planning that takes place in late April/early May, which allows the CBE to inform transportation users about changes for the coming school year. The strategy is to engage internal stakeholders in March. We will also inform/educate stakeholders about the complexities of the transportation system and collective stakeholder concerns and aspirations in March. An advisory committee, with internal and external representatives, was established in February to provide advice on the Master Transportation Strategy and the engagement design. After this period of preparation and planning, stakeholders will be informed and educated so they can provide practical suggestions in support of adjustments to service levels and/or user fees. Suggested engagement activities include interviews with key stakeholders, focus groups with principals and superintendents, school-based group discussions with parents and other stakeholders, and then community/public forums in April. Following that, the input will be analyzed and the preferred strategy will be identified for consideration.

CBE values will help guide decision-making. They are as follows:

- Students come first.
- Learning is our central purpose.
- Public education serves the common good.

In addition, the CBE is committed to delivering programs and services in a fiscally-responsible way. With this in mind, the amount of learning dollars used to support transportation services should be minimized or eliminated. Ideally, the transportation services budget would not exceed its budget envelope (provincial funds and user fees). Parents, students, principals and other stakeholders will work collaboratively, in small and medium-sized groups, through March and April to form a clear understanding of issues and aspirations and then, in mid-April, come together in larger groups to define transportation strategy options that respect the transportation budget envelope. The objective of these larger “community forums” is to encourage consensus on the way forward. In the event that a consensus is not possible, the decision-maker will adopt the advice received during the engagement as much as possible in making the required adjustments. A number of design parameters will guide the strategic approach to this engagement:



- a. Engagement conversations will be values-based. That is, they will be framed by CBE values: Students Come First, Learning is our Central Purpose, Public Education Serves the Common Good.
- b. Other values will be introduced or flow from these higher level values, such as student safety, equitable access to learning opportunities, fiscal responsibility and others.
- c. We will communicate values and educate stakeholders about complexity before the active engagement period, in order to raise the general level of understanding around transportation issues.
- d. Communication of background information and engagement opportunities (times, dates and venues) to parents will happen in a reasonable time prior to engagement.
- e. We will involve key stakeholders in information collection to demonstrate process integrity and build credibility for results.
- f. Existing communication channels and mechanisms will be exploited to the maximum degree. This includes communication through schools, through partners, the CBE website and paid advertisements.
- g. We will set out the context for the conversation early. (see 5. Givens)
- h. Information derived from the SBC review will be provided as part of the engagement communication plan.
- i. Both internal and external stakeholders will be engaged and have opportunities to provide input.
- j. Concerns and aspirations will be discussed in order to formulate options for consideration.
- k. We will concentrate the external engagement period by holding concurrent in-person meetings at a variety of locations in a defined period of time.
- l. Engagement formats will be guided by stakeholder preference.
- m. CBE trustees and senior staff are encouraged to attend engagement events. Their primary role is to listen to the concerns and aspirations of stakeholders.
- n. Social media and online engagement opportunities will be created.
- o. In-person engagement is most preferred. Therefore, as possible, superintendents and principals will be engaged through focus groups, and parents, students and community members will be engaged through a series of school-based workshops as well as broad, large-scale community forums.
- p. An advisory committee will provide guidance and input throughout the engagement process.



## 8. ENGAGEMENT OBJECTIVES

This dialogue seeks to achieve several objectives in order to support meaningful, community-centric engagement. Principally, the engagement seeks to achieve three goals: build understanding about the fiscal realities for transportation services, facilitate inclusive conversations among stakeholders in order to document community concerns and aspirations, and then to use community input as part of a collaborative problem-solving with all stakeholders, in order to address the budget gap. This requires the CBE to meet several objectives, which will result in outputs (tangible deliverables) and outcomes (changes in understanding, perspective, relationships, level of trust, etc.). Both the outputs and outcomes will support the CBE in reviewing and adjusting the transportation budget towards sustainable levels.

References in the objectives to inform, consult, involve and collaborate are explained in Appendix A.

**Objective #1:** *To inform, and more importantly, to educate stakeholders about the pressing need for changes to transportation services in order to achieve financial sustainability.*

- a. *Outcome<sup>1</sup>: An external advisory committee is established.*
- b. *Outcome: Stakeholders understand the extent of the current fiscal realities.*
- c. *Outcome: Stakeholders understand the history of how the current situation came about.*
- d. *Outcome: Stakeholders know how to get engaged.*
- e. *Outcome: Stakeholders are motivated and participate in engagement activities.*

**Objective #2:** *To involve stakeholders in development of the engagement process.*

- a. *Outcome: Stakeholders (through the advisory committee process) are involved in developing the engagement process.*
- b. *Outcome: Stakeholders acknowledge the engagement process is fair and accessible.*
- c. *Outcome: Stakeholders participate in engagement activities and recognize their participation to be meaningful.*
- d. *Output: An engagement plan that includes a timeline and step-by-step engagement process (this document).*



**Objective #3:** To collaborate with stakeholders on how to develop financially-sustainable transportation services.

- a. *Outcome: Stakeholders say they have been meaningfully involved in the development of changes to transportation services.*
- b. *Outcome: Stakeholders accept the changes as necessary.*
- c. *Output: A series of criteria and/or options that will be used to make decisions about services, fees and costs.*
- d. *Output: Detailed records of engagement.*
- e. *Output: Contact lists of stakeholders who wish to continue the dialogue on transportation planning or other related CBE issues.*

**Objective #4:** To consult with stakeholders on options for addressing the budget gap.

- a. *Outcome: Stakeholders understand the trade-offs that must be made to close the budget gap.*
- b. *Output: A series of options are generated based on analysis and stakeholder input.*
- c. *Output: Stakeholder preferences are documented.*

**Objective #5:** To inform stakeholders how their involvement led to changes in transportation services.

- a. *Outcome: Stakeholders understand and accept that changes are required to close the budget gap.*
- b. *Outcome: Stakeholders can see they have impacted decision-making.*
- c. *Output: A summary of participant evaluation scores.*
- d. *Output: Appropriate communications to stakeholders summarizing input and how it influenced transportation decisions.*



## 9. COMMUNICATIONS & EDUCATION

A comprehensive communications and education effort is critical to the engagement's overall success. Stakeholders will need to see that adjustments are necessary in order to sustain transportation services over the long-term. Communications for awareness and education will launch after plans for engagement are announced.

### KEY MESSAGES

- The CBE is committed to safe and reliable transportation in support of student success.
- Changes to transportation are required to ensure efficiency and responsible management of the CBE budget.
- The input gathered from stakeholders will play an important role in decision-making on changes to transportation.

### CHANNELS

We will communicate regularly and consistently through multiple communication channels. The launch period may include paid advertisement. Discussion booklets will be prepared to support the school-based workshops and community forums. These will be a short, factual accounting of the current situation made available online and print-ready from the CBE Public Engagement webpage. Questions for the booklets will be released prior to the external engagement.

### AUDIENCES

- Parents
- Students
- The public
- Staff
- Trustees
- School bus providers
- Calgary Transit



## PHASED COMMUNICATION / EDUCATION MESSAGING

### Phase One -February to March: Scoping the Conversation

- Technical review completed in support of public engagement.
- Technical review found very few opportunities to gain operational efficiencies.
- The CBE's values and mission are clear. Student success is the priority. Therefore, this strategy seeks to minimize or eliminate the learning dollars spent to subsidize transportation.
- The CBE will be conducting intensive internal engagements in March to identify potential solutions.
- In Early April the CBE will engage students, parents and other stakeholders to help define a strategy towards a sustainable transportation program.

### Phase Two - Early-March to Mid-April: Build Understanding

- Student success is our primary goal.
- There are no other funding sources, i.e. provincial supplements or reserve funds.
- As responsible stewards of public funds, the CBE aims to deliver a balanced budget.
- The transportation budget must reach sustainable levels within three budget cycles (i.e. three years).
- This strategy seeks to minimize or eliminate the learning dollars spent to subsidize transportation.
- Trade-offs must be made. These will be guided by CBE and community values.
- Scope of engagement includes the parameters:
  - transportation fees,
  - service levels,
- Transportation service for students with complex learning needs will be maintained.

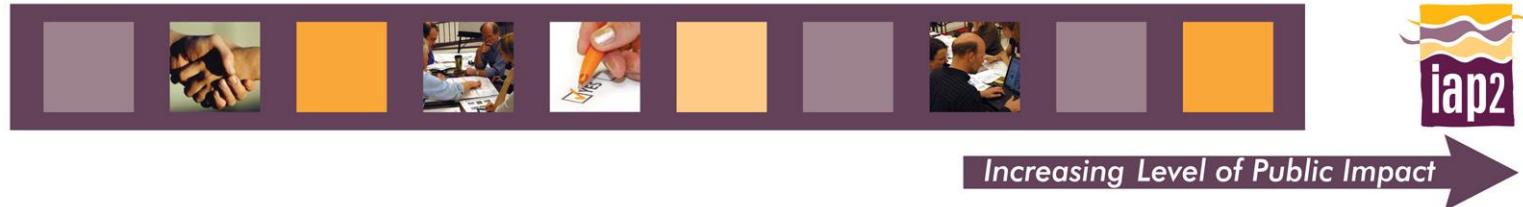


## 10. ENGAGEMENT TIMELINE

Phase I	Phase II	Phase III	Phase IV	Phase V	Phase VI	Phase VII	Phase VIII
Pre-Consultation / Engagement Design	Approvals & Announcement	Communication & Education	Key Stakeholder Interviews	Internal Engagement	Community Engagement	Analysis & Preliminary Report	Follow-up Communications
Feb 2 - Mar 1	Feb 4 - Mar 11	Feb 19 - Apr 16	March	March	April 6- May 4	April 18-29	May 10-13
Establish advisory group.	Research / environmental scanning. Work with Trustees and CBE senior staff to develop / confirm approach.  Announce transportation review and engagement.	Launch and operate communication plan.	Conduct 8-10 key stakeholder interviews.	Conduct interviews and focus groups with school principals, directors and superintendents; build on input from Phase IV interviews.	Conduct 15 school-based evening workshops (5 concurrent sessions - 1/Area - on three different evenings).  Conduct two community forums - May 3 and 4.	Compilation and analysis of input in order to identify themes and trends in order formulate recommendations.	Provide summary of input, recommendations, influence on decision, as well, summary of evaluation results.
1. Telephone interviews 2. Preliminary engagement plan 3. Advisory group	4. Approved meeting minutes 5. Approved engagement plan 6. News Conference 7. Press Release 8. Update CBE engagement page	9. Fact sheets 10. Direct email/letter home 11. Twitter 12. Additional communications if possible	13. Completed interview guides as input for next phase of engagement	14. Summary of focus group input 15. Themes and trends from engagement so far	16. School-based forum groups 17. Community forum	18. Report on findings and recommendations	19. Direct email 20. Web page update 21. News release

## Appendix A

### IAP2's Public Participation Spectrum



Public participation goal	Inform	Consult	Involve	Collaborate	Empower
Promise to the public	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.
Example techniques	<ul style="list-style-type: none"><li>■ Fact sheets</li><li>■ Web sites</li><li>■ Open houses</li></ul>	<ul style="list-style-type: none"><li>■ Public comment</li><li>■ Focus groups</li><li>■ Surveys</li><li>■ Public meetings</li></ul>	<ul style="list-style-type: none"><li>■ Workshops</li><li>■ Deliberative polling</li></ul>	<ul style="list-style-type: none"><li>■ Citizen advisory Committees</li><li>■ Consensus-building</li><li>■ Participatory decision-making</li></ul>	<ul style="list-style-type: none"><li>■ Citizen juries</li><li>■ Ballots</li><li>■ Delegated decision</li></ul>

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