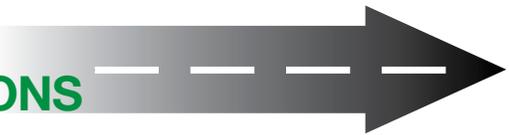


Accelerating Rural Transportation Solutions

TEN COMMUNITY CASE STUDIES FROM ONTARIO



**ACCELERATING RURAL
TRANSPORTATION SOLUTIONS**



AUTHORSHIP AND ACKNOWLEDGEMENTS

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Robb MacDonald, *MacComm International*

Special appreciation is extended to the key informants from each of the case study groups who provided the information that comprised the bulk of the case studies. They are the following:

- **Colltrans - Wasaga Beach/Blue Mountains Transit Links:** Kris Wiszniak, Engineering Technician, Town of Collingwood
- **Community Care Northumberland Specialized Transportation Program:** Jessica Hoskin, Specialized Transportation Coordinator, and Alicia Vandine, Regional Community Relations Coordinator
- **Corridor 11 Bus:** Shonna Caldwell, Program Information Manager, Community Services, District Municipality of Muskoka
- **Deseronto Transit:** Susan Stolarchuk, Transit Administrator, Town of Deseronto
- **Dial A Ride Rural Route Transit:** Enzo Ingrubelli, Public Works Transportation Supervisor, City of Kawartha Lakes
- **EasyRide:** Melanie Higgins, Transportation Supervisor & EasyRide Lead Transportation Coordinator, ONE CARE Home and Community Support Services
- **Lanark Transportation Association:** Marilyn Bird, Executive Director
- **Ride Norfolk:** Brad Smith, Public Transportation Coordinator, Norfolk County
- **Saugeen Mobility and Regional Transit (SMART):** Roger Cook, Manager
- **The Rural Overland Utility Transit (TROUT):** John Keith, Manager of Transportation Services, and Gord MacDonald, Executive Director, Community Care North Hastings

Appreciation is also expressed to members of the *Accelerating Rural Transportation Solutions* Project Management Team, listed below, and the Project Advisory Committee, who are too numerous to mention, as they contributed to identifying potential case study groups and assisted with the development of the research methodology.

Project Management Team:

Norman Ragetlie, *Rural Ontario Institute*

Rob Black, *Rural Ontario Institute*

Scott Currie, *Rural Ontario Institute*

Lorna McCue, *Ontario Healthy Communities Coalition*

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Brad Smith, *Ride Norfolk*

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INTRODUCTION

1. Background

Rural residents have voiced concerns about transportation challenges for a long time. The lack of viable transportation options in rural areas makes it difficult for many adults and youth, especially those with low incomes, to take advantage of employment and educational opportunities, attend health and social service appointments, or participate in social and leisure activities. This is a persistent issue and, given the aging demographic of rural Ontario, the need for affordable and accessible transportation services will increase in the future. The assumption that social, economic and health needs can be met solely by private cars and volunteer programs is becoming increasingly untenable. Transportation services are also needed for rural communities to thrive economically by supporting a skilled, mobile labour force within the region. However, rural transportation is a complex and challenging problem, and the solutions will almost certainly require many organizations to work together to support new approaches.

Responding to these concerns, the Rural Ontario Institute and the Ontario Healthy Communities Coalition collaborated on a project to share knowledge of effective models and emerging innovation in rural regional transportation. “Accelerating Rural Transportation Solutions”, funded by the Ontario Trillium Foundation was designed to:

- Identify and document case studies of effective rural regional transportation approaches in Ontario
- Implement and report on a study of the current and potential business models and financing sources for cost-shared rural transportation systems
- Communicate and facilitate dialogue to share the above resources at events and through learning channels including workshops, webinars and forums.

Many organizations expressed support for this project, several of which appointed delegates to a Project Advisory Committee. A Project Management Team, consisting of representatives of the collaborating organizations, transportation providers and others, was also established to oversee and coordinate project operations.

The Project Management Team identified a number of models of collaborative rural transportation solutions that have emerged and are continuing to evolve in Ontario. Several leaders of those programs were able to share their stories and engage in a cross-sector dialogue with rural stakeholders as a result of their participation in the project. Some participated in workshops and forums or provided expert advice in various areas of the project. For instance, a three-part webinar series was offered in partnership with HC Link in February and March, 2014. Recordings of the webinars, slides and related documents are available at: www.ohcc-ccso.ca/en/rural_transportation_webinars.

Also, a user-friendly resource to allow transportation service providers to assess and identify opportunities to collaborate and develop a coordinated transportation model was created. It is entitled Towards Coordinated Rural Transportation: A Resource Document (Dillon Consulting, 2014) and available at: www.ruralontarioinstitute.ca/resources-reports/ under the heading “Rural Transportation”.

2. Scan of Rural Transportation Programs

One of the initial activities of the project was to conduct a scan to identify transportation initiatives that appear to be successful and potentially sustainable. Various types of initiatives were sought out, including public transit, agency collaborations, ride-sharing/car-pooling and coordination and planning initiatives. We invited anyone we knew to be involved in a rural transportation program to fill out an online survey, and we asked them to pass the invitation along to others. The survey gathered basic information about the programs, including, for example, the type of program, whom it serves, what vehicles are used, and information about fares and schedules. We produced a list of programs of varying types, such as public transit, volunteer driver programs and ride-sharing initiatives. Below is a list of the 35 public and not-for-profit programs that participated in the scan:

Special Populations

1. Community Care City of Kawartha Lakes Transportation Services
2. EasyRide
3. MOVIN'GB Transportation
4. Saugeen Mobility and Regional Transit (SMART)
5. South-East Grey Support Services
6. Beaver Valley Outreach Special Needs Transportation
7. Belvedere Heights Community Support Services Volunteer Transportation
8. Canadian Red Cross
9. Community Care for South Hastings
10. Community Reach
11. Elmira Kiwanis
12. Lanark Transportation Association
13. Georgian Handivan Association
14. Muskoka Family Focus and Children's Place
15. Volunteer Transportation Program (Picton)
16. Wheels 4 Wheels – Huronia Seniors Volunteer Care Team

General Population

17. Collingwood-Wasaga Beach/Collingwood-Blue Mountains Transit Links
18. Deseronto Transit
19. Elmira Bus Route Service
20. Community Care Northumberland Specialized Transportation Program
21. Kawartha Lakes Dial a Ride Rural Transit
22. Perth East Transportation
23. Ride Norfolk
24. Corridor 11 Bus
25. The Rural Overland Utility Transit (TROUT)
26. Town of Cobourg

Information, Planning and Coordination

27. Bruce Grey Poverty Task Force – Transportation Action Group
28. Coordinated Transportation Strategy Committee (Grey County)
29. Huron Perth Transportation Network
30. Headwaters Communities in Action
31. Community Transportation Committee (Simcoe County)
32. Tillsonburg Transportation Working Group
33. Alzheimer Society of Simcoe County

Active Transportation

34. Haliburton Communities in Action

Ride-Sharing

35. Haliburton Rideshare – Rural Transportation Options

3. Scope of the Case Studies

The case studies attempted to answer the question “How can an effective, sustainable transportation system be created to serve a rural community?” The consultants set out to examine transportation initiatives within Ontario

that appear to be successful and potentially sustainable. Public transit, volunteer driver, carpooling/ride-sharing and active transportation initiatives were all initially considered. Ten programs were identified and selected to be the subject of a case study designed to explore:

- a) how well rural transportation needs are being met
- b) financial viability and the probability of long term sustainability
- c) the health, social, economic and environmental impacts of the initiative.

4. Criteria for Case Study Selection

The programs selected for case study:

- represent a diverse mix of locations, community forms and types of initiatives
- meet a range of needs broader than those of a single agency's client population
- are sufficiently established to assess results
- serve rural Ontario
- operate on a not-for-profit basis
- provided a key informant who shared information, documents and photos about their program.

5. Research Methodology

The case study method combined the collection of primary qualitative data and secondary quantitative data. Quantitative data was collected regarding community characteristics, analyses of transportation supply and demand, and service outputs. Qualitative data, in the form of information, personal perceptions and reflections, were obtained from key informant interviews. The schedule of questions used in the key informant interviews is provided in Appendix A. A case study template was developed and each consultant undertook a study of three or four transportation initiatives. Interviews were conducted by phone or in-person, and the results of each case study were validated by the key informants.

6. Case Study Components

Data was collected and analyzed regarding:

a) Community Profile

- Geography
- Demographics
- Density
- Political and governance structures
- Major industries
- Major travel destinations
- Community form
- Relationship to surrounding area
- Community resources
- Community culture and social capital
- Transportation nodes and corridors
- Existing transportation plans

b) Local Transportation Issues

- Summary of overall transportation demand
- Summary of overall transportation supply prior to the establishment of the initiative being studied
- Issues identified that led to the establishment of the initiative

c) Initiative Background

- History of the specific program being studied
- Objectives
- Partnerships
- Development Process
- Capital investments
- Initial funding sources

d) Current Operations

- Demographic description of ridership, members and/or participants
- Organizational Structure
- Operating costs and revenues

- Source of revenues (taxes, grants, public/private donations and sponsorship)
- Case statements to support funding requests (“selling points”)
- Staffing (paid and unpaid)
- Kilometres travelled
- Distances traveled
- Routes and schedules
- Partnerships, coordination or sharing of resources with other service providers
- Challenges & Successes

e) Impacts

- Economic impact (cost, employment and business activity)
- Social impact (mobility and independence, leisure activities)
- Health impacts (physical and mental health, medical appointments, active transportation)
- Environmental impact (vehicle emissions)

f) Future Considerations

- Future plans
- Projected costs and revenues
- Anticipated changes in demographics, funding arrangements, etc.

It was not possible to collect data on all of the items listed above within the time frame allotted for this project for each of the case studies. The variance in the level of detail among the studies is due to the varying availability of secondary data and the level of knowledge of the key informants.

7. Analysis and Reporting

The data collected during the research has been summarized for each case study to provide practical examples of successful and potentially sustainable rural transportation programs. In addition, a basic analysis of similarities and differences across the programs was undertaken and emergent themes relating to issues, challenges and experiences are documented in the Summary.

8. Publication

The report of the case studies has been published in three formats:

- a) The full study has been formatted for web-based publication, on the partner organizations’ websites at: <http://www.ohcc-ccso.ca/en/rural-transportation> and www.ruralontarioinstitute.ca/resources-reports/;
- b) A full-colour, print version is also available for download from these sites, or may be ordered from info@ohcc-ccso.ca; and
- c) Single copies of each case study have been delivered to the organizations that participated in the case studies.

We all pay property taxes either directly through home ownership or indirectly as renters. These taxes pay for all municipal services, including roads. Since auto ownership is a surrogate of income, it means that the lower income resident who cannot afford a car is paying taxes to support a higher income resident who owns a car. Yet if there is no transit service then the higher income resident does not support the low income resident through the taxes needed to support a good level of transit service; herein lies the unfairness.

Beck, Wally and Mark Mis, HDR | iTRANS Right-Sizing Transit: What Is A Reasonable Level of Transit Investment. 2010.

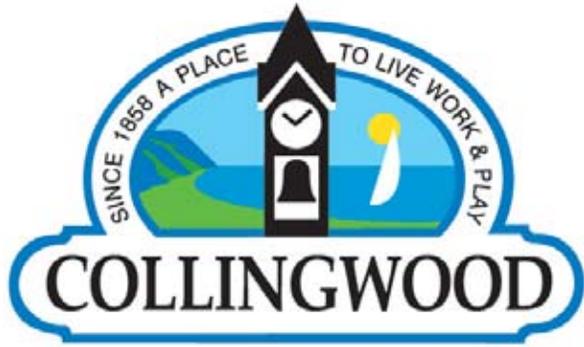
www.hdrinc.com/about-hdr/knowledge-center/white-papers/2011-right-sizing-transit-what-is-a-reasonable-level-of-tran

CASE STUDY #1

COLLTRANS

COLLINGWOOD-WASAGA BEACH
AND COLLINGWOOD-
BLUE MOUNTAINS TRANSIT LINKS

Information for this case study was provided by
Kris Wiszniak, Engineering Technician, Town of Collingwood.



A. Overview of Transportation Initiative

The Collingwood-Wasaga Beach and Collingwood-Blue Mountains Transit Links programs are relatively new initiatives in the South Georgian Bay area. The Collingwood-Wasaga Beach Link was started in August 2011 as a pilot partnership between the municipalities of Collingwood and Wasaga Beach with support from the County of Simcoe.

Since then, it has become an integral component of the public transit systems for both communities operating seven-days-a-week.

The Collingwood-Blue Mountains Link was launched in November of 2013, also as a pilot service between the two municipalities. However, this pilot has been funded through a public private partnership among The Towns of Blue Mountains and Collingwood, as well as Blue Mountain Resorts Limited and the Blue Mountain Village Association.

Both Link programs have had higher than expected ridership figures, with transportation to and from school and work being the primary benefits for the Collingwood-Wasaga Beach route, while the Collingwood-Blue

Mountains service has been largely used for employees getting to work at the Resort and other businesses in the Village.

B. Context

Location

The three communities that are part of this initiative are Collingwood, The Blue Mountains and Wasaga Beach. Together with Clearview Township, they are often referred to regionally as South Georgian Bay.¹

The three communities are situated along the southern most part of Georgian Bay with the Town of Blue Mountains the furthest west, followed by Collingwood and then Wasaga Beach.

Demographics/Density

Collingwood (population 19,241)² is the business centre for the larger region. It is the largest of the four communities by population but the smallest by area.

The Blue Mountains (population 6,453)³ is actually part of Grey County (the other three communities are in Simcoe County). The community has two urban areas, Clarksburg

¹ South Georgian Bay Regional Economic Development Strategic Plan (June 2011).

² 2011 Census Profile for the Town of Collingwood: <http://www12.statcan.gc.ca/census-recensement/2011/dp-pd/prof/details/page.cfm?Lang=E&Geo1=CSD&Code1=3543031&Geo2=CD&Code2=3543&Data=Count&SearchText=Collingwood&SearchType=Begins&SearchPR=35&B1=All&Custom=&TABID=1>.

³ 2011 Census Profile for the Town of the Blue Mountains: <http://www12.statcan.gc.ca/census-recensement/2011/dp-pd/prof/details/page.cfm?Lang=E&Geo1=CSD&Code1=3542045&Geo2=CD&Code2=3542&Data=Count&SearchText=The%20Blue%20Mountain&SearchType=Begins&SearchPR=01&B1=All&Custom=&TABID=1>.

and Thornbury plus the Village at Blue Mountain Resort, which was developed as a mixed use (resort/retail/residential) development with fractional ownership properties.

The Town of Wasaga Beach (population 17,537)⁴ is the location of the “longest sandy largest freshwater beach in the world” and is the fastest growing community in the region.

The municipal boundaries of Collingwood and Wasaga Beach are very compact. Clearview and The Blue Mountains, on the other hand, have hundreds of square kilometres of agricultural land within their boundaries.

The region as a whole has experienced more than 10% growth over the last decade, prompted in part by the development of the Intrawest Blue Mountain Ski Resort and the rapid development of condos and new single family housing in Collingwood, The Blue Mountains and Wasaga Beach.

Wasaga Beach in particular has experienced very strong growth, expanding by 21% between 2001 and 2006. It accounted for more than half (53%) of all growth across the four municipalities. The population growth of the entire region at 10.1% exceeded the 6.1% provincial growth rate by a substantial margin.

Economy

The Town of Collingwood is the regional economic hub. According to the South Georgian Bay Regional Economic Development Strategic Plan, approximately 50% of the region’s retail and service sectors are in Collingwood. Additionally, the health, manufacturing, accommodation and food sectors are strong in Collingwood. Of the 20,000 jobs in the region, more than half (54.6%) are in Collingwood.

In the Town of The Blue Mountains, the economy is dominated by the Intrawest Blue Mountain Ski Resort,

which is the largest ski resort in the province. In 1999, Intrawest became a majority owner, taking over from the Weider family. Since then, the resort has undergone several major expansions.

The Town of Wasaga Beach is also dependent on tourism for its economy. With the longest fresh water beach in the world (at 14 kilometres), this natural tourism phenomenon is responsible for attracting hundreds of thousands of visitors each summer.

From an employment perspective, the region’s top six sectors are:

1. Retail (2,470 jobs)
2. Accommodation and food (2,610)
3. Manufacturing (2,190)
4. Health and social services (1,995)
5. Construction (1,115)
6. Agriculture (710)⁵

C. Background

Public Transit in Collingwood and Wasaga Beach

The Collingwood Public Transit system, or Colltrans as it is commonly known, began in 1982, beginning with two routes. In 2007, with the aid of the provincial and federal gas tax monies, three new buses were purchased. The existing routes were also modified and a third route was added thereby increasing service levels. The system operates seven days per week except on statutory holidays.

The fleet is comprised of three buses that are “fully accessible and can be used for wheelchairs, motorized scooters, pull behind shopping carts, as well as strollers. The buses are all equipped with a passenger side access ramp, which is available for use upon request as well as Q-STRAINT securement. All buses are outfitted

⁴ 2011 Census Profile for the Town of Wasaga Beach: <http://www12.statcan.gc.ca/census-recensement/2011/dp-pd/prof/details/page.cfm?Lang=E&Geo1=CSD&Code1=3543064&Geo2=CD&Code2=3543&Data=Count&SearchText=Wasaga%20Beach&SearchType=Begins&SearchPR=35&B1=All&Custom=&TABID=1>.

⁵ South Georgian Bay Regional Economic Development Strategic Plan (June 2011).

with bike racks as well which are available for use at no extra charge.”⁶

The Collingwood Public Transit system is also responsible for operating the Accessible Transit Service and the Collingwood Accessible Shuttle. The Town of Collingwood also provides operating funding and two Accessible Vehicles for The Red Cross Accessible Service that operates within Collingwood.

In 2008, Wasaga Beach introduced its public transit system, beginning with two routes. The municipality has since expanded the service to three routes.

Background of Current Initiative

According to Kristofer Wiszniak, Engineering Technician with the Town of Collingwood, talks began in 2009-10 among municipal politicians from the Towns of Blue Mountains, Collingwood, Wasaga Beach the County of Simcoe about the feasibility of creating a transit service that would link the three communities.⁷

At approximately the same time, researchers conducted a number of stakeholder consultations, including six sector-specific focus groups in the South Georgian Bay area. One of the key issues emerging from the focus groups was the lack of a coordinated regional transit service.⁸

Participants in the focus groups identified that a regional transportation system – in this case, a connection between Wasaga Beach and Collingwood – would help with the following:

- Attracting and supporting younger families who might otherwise not consider living in the area
- Providing transportation support for post-secondary programs

- Improving opportunities for young adults to work in other areas within the region, particularly The Blue Mountains
- Improving access to health care facilities, particularly those in Collingwood.⁹

The focus group participants also reported that improved regional cooperation was the key to building a successful regional transit system (among other priorities) and could build upon regional successes like sewage and water treatment; police servicing; the Georgian Trail; and the regional airport, to name a few.¹⁰

Initial Funding

In the summer of 2011, the Towns of Collingwood and Wasaga Beach were presented with an opportunity from the County of Simcoe: \$36,000 was to be made available in pilot seed funding for creating the first transit link between Collingwood and Wasaga Beach.

The funding was designed to accommodate a six-month pilot with the expectation that, if the ridership numbers warranted it, the transit link would continue to be supported by the two municipalities.

Initially, the municipalities rented a bus from the operator that won the bid for the pilot project – Sinton Transportation (the company also responsible for Collingwood’s other transportation services).

The Pilot Project – Collingwood-Wasaga Beach Transit Link

The pilot started on August 12, 2011, with one bus providing service in the morning between 6:00 and 9:30 am and in the afternoon between 3:00 and 7:00 pm, Monday through Saturday.

⁶ From the About Collingwood Public Transit webpage: <http://www.collingwood.ca/Colltrans>. Accessed on May 7, 2014.

⁷ Telephone interview, May 8, 2014.

⁸ South Georgian Bay Regional Economic Development Strategic Plan (June 2011).

⁹ Ibid.

¹⁰ Ibid.



Once the pilot started, the project managers began surveying riders to gauge their needs and develop rider profiles. Several key trends emerged:

First, the biggest demand was from high school students commuting to school from Wasaga Beach to Collingwood.

The second greatest need was for people getting to and from work. The initial assumption was that there would be a greater flow of riders from Wasaga Beach to Collingwood for people going to work. However, they found that there was an almost equal flow from Collingwood to Wasaga Beach.

Third, many people began using the service to get to medical appointments in Collingwood, particularly younger mothers who did not have a vehicle, driver's license or family/friends who could drive them.

Initial Challenges

Kris reported the challenges there were when developing the service. First, riders almost immediately wanted an extended service and not just the 'broken' peak service that the pilot could accommodate.¹¹

Second, because of the need to cross two different municipal boundaries, the provincial Ministry of Transportation required a Public Vehicle License; however, because the company operating the bus, Sinton, already held such a license, there were no significant delays.

D. Current Operations – Collingwood to Wasaga Beach

Schedule and Fares

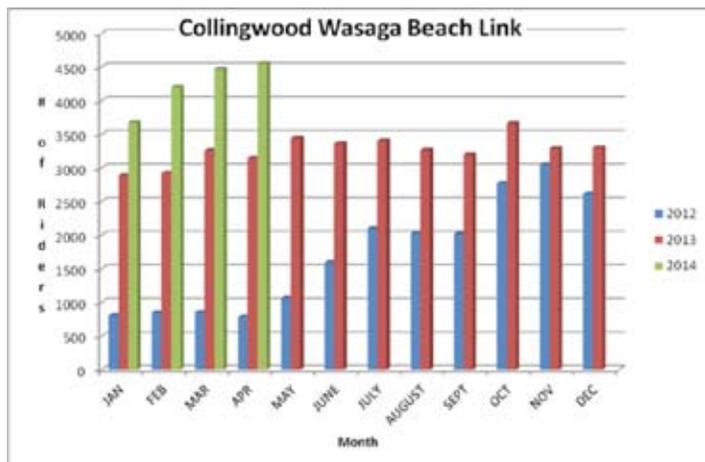
The Collingwood Wasaga Beach Link now runs as a continuous loop from Monday to Saturday between 6:00 am and 7:00 pm. The bus (there is only one bus) leaves/arrives Collingwood on the hour and arrives/leaves Wasaga Beach on the half hour.

A single fare is \$2.00 for all riders (regardless of age). Monthly passes are available for \$40.00. Recently, a "Universal Transit Pass" was created that, for \$120/month, allows unlimited access to the Link, Wasaga Beach Transit and Colltrans.

The service is coordinated out of the Collingwood office.

¹¹ Telephone interview, May 8, 2014.

Ridership



Partnership Structure

Currently, there is a partnership between the towns of Collingwood and Wasaga Beach. Through this partnership, a new bus was purchased to replace the one previously rented from Sinton Transportation. Sinton continues to operate the bus and was recently awarded the bid for a seven-year contract to run all of the Colltrans services.

Revenues

In addition to the individual and monthly fares, the program now benefits from the monthly passes purchased by Ontario Works (Simcoe County). This predictable and significant monthly purchase on the part of the County “offsets the operating costs immensely.”¹²

There are also provincial gas tax dollars that help fund the Transit Link; however, because the majority (70%) of potential funding is population-based and therefore already captured through each municipality’s respective agreements with the Province, the remaining 30%, which is based on ridership numbers, is relatively low.

Collingwood to The Blue Mountains – Pilot Project

A report submitted to The Blue Mountains Council by The Blue Mountain Resorts Limited and Blue Mountain Village Association states that a link between Collingwood and The Blue Mountains dates back to October of 2007. However, The Blue Mountains was not in a position to pursue the transit link initiative for several more years.¹³

As part of their report, the authors identified a number of potential benefits to the Town of The Blue Mountains, including:

- Support to regional economic development by: addressing the “biggest barrier to working at the Resort as well as the over 40 Blue Mountain Village employers”; assisting Resort employers; expanding regional commerce; connecting affordable housing with employment opportunities; and
- Support to sustainability by: ensuring provincial gas tax funding is received; providing a green transportation solution; providing expansion possibilities within the community.¹⁴

With the financial commitment of The Blue Mountain Resort and the Blue Mountain Village Association, combined with the support of a petition signed by 2000 residents, The Blue Mountains Council voted in favour of a pilot project to start in November of 2013 and conclude in May of 2014.¹⁵

Like the initial Collingwood to Wasaga Beach pilot, the Collingwood Blue Mountains service is broken up, with service in the morning between 7:00 and 10:00 am and in the afternoon between 3:00 and 7:00 pm, Monday to Sunday.

¹² Ibid.

¹³ Part of a Staff Report to Committee of the Whole of The Town of Blue Mountains (DOR.14.06; February 3, 2014) by Shawn Everitt, Director of Community Services; accessed at http://www.thebluemountains.ca/public_docs/events/B.6.2%20DOR.14.06%20Update%20re%20Link%20to%20Collingwood%20Transit.pdf on May 24, 2014. The report is dated October 7, 2013.

¹⁴ Ibid.

¹⁵ Ibid.

Unlike the initial funding for the Wasaga Beach to Collingwood service, which came from the County of Simcoe, \$40,000 in funding for the Collingwood to Blue Mountains pilot was provided by Intrawest Resort and the Blue Mountain Village Association through a public private partnership with the municipalities.

During the winter months, use of the service was encouraging. From November to February, inclusive, more than 7,000 riders took advantage of the service. As presented in the Staff Report to Collingwood Council on March 31, “ridership numbers are nearly triple what was projected by staff.” However, staff also caution, “although the numbers are much higher, the original budget was based upon a full year of service and factored in the lower ridership season.”¹⁶

The primary reason for its winter success was to transport employees to and from the Resort, which employed 1800 people in the winter, of which it is believed at least half had Collingwood addresses”.¹⁷ A survey of riders conducted in February determined that the majority of riders (58.2%) were from Collingwood, 29.7% from The Blue Mountains and 12% from Wasaga Beach. Additionally, one quarter (24.9%) of the riders said they were using the transit for work. Other reported reasons included a lack of vehicle (18.4%), recreation (11.0%) and shopping (10.8%).

The six-month pilot, which initially ended May 15, 2014, was extended to August. Organizers wanted to see if the ridership numbers from the winter continue throughout the summer months. If the service does appear to be viable, presentations will be made to both municipal councils to solicit support for ongoing funding.¹⁸

As of September 1, 2014, both Municipalities have agreed to extend the service to a permanent service for a five year term. With support from The Blue Mountain Resort and the Blue Mountain Village Association, the Collingwood Blue Mountains Link is expected to gain increased success for the upcoming winter months.

Additionally, officials from the Ministry of Transportation have estimated that the Collingwood Blue Mountains transit link could qualify for approximately \$55,000 in the Population category alone of the provincial gas tax funding.¹⁹



Figure 1 Collingwood Mayor Sandra Cooper (left) and The Blue Mountains Mayor Ellen Anderson launching the Collingwood-Blue Mountains Link, November 19, 2013.

¹⁶ Town of Collingwood Staff Report (Report #PW2014-06, March 31, 2014); Submitted to Mayor and Council by Brian Macdonald; Subject: Collingwood Blue Mountain Transit Review; provided electronically by Kris Wiszniak, May 23, 2014.

¹⁷ Telephone interview with Kris Wiszniak, May 8, 2014.

¹⁸ Ibid.

¹⁹ Town of Collingwood Staff Report (Report #PW2014-06, March 31, 2014).

CASE STUDY #2

Community Care Northumberland

Information for this case study was provided by
Jessica Hoskin, Specialized Transportation Coordinator, Community Care Northumberland
and Alicia Vandine, Regional Community Relations Coordinator, Community Care Northumberland



A. Overview of Transportation Initiative

Established in 1988, Community Care Northumberland (CCN) is a multi-service, volunteer-based community support organization in Northumberland County. Over 850 regional volunteers enable clients to experience a higher quality of life by strengthening their connections with the community. They accomplish this through the delivery of essential community support services:

- Community Diners
- Friendly Visiting
- Home at Last
- Home Help and Maintenance Programs
- Hospice Palliative Care Programs
- Meals on Wheels Programs
- Supports for Caregivers
- Telephone Security Checks
- Transportation Services including accessible transportation options
- Wellness, Social and Recreational Programs

One of the programs offered through Community Care Northumberland is the recently reorganized Specialized Transportation program, which provides an Accessible Service and a Rural Service.

Rural Service: Working with the County of Northumberland and several local municipalities, the goal of this service is to offer rural transportation within our County that is affordable, accessible, and sustainable for all residents

of Northumberland County. Services are pre-booked and clients are driven in agency vehicles. Wheelchairs, walkers, child car seats, etc. can be accommodated. The rural service is currently operating in Cramahe & Alnwick/Haldimand Townships as well as the Municipality of Trent Hills, with limited transportation to/from the Municipality of Brighton. Riders must be registered to use this service by completing a CCN client registration form prior to riding, and those under 16 years of age must be accompanied by an adult. Bookings are handled through a centralized scheduling office that serves all residents across the County. The scheduling office has information on each registered client's needs and appropriate resources are booked to ensure each individual client's needs are met (e.g., whether they require an accessible vehicle.)

B. Context

Location

Northumberland County is located in south-eastern Ontario along Highway 401 between Toronto and Kingston. It covers a land area of 1,905 square km., bordered on the south by Lake Ontario, and on the north by Rice Lake.¹

Northumberland County offers a range of living experiences from historic towns to scenic rolling rural areas to spectacular water settings on Rice Lake, the Trent River and Lake Ontario.²

Demographics

The population of Northumberland County is 85,390, with market access to 9 million people within 50 minute by

¹ Northumberland County Economic Development: <http://www.investnorthumberland.ca/en/siteselectors/transportation.asp>.

² Northumberland County: <http://www.northumberlandcounty.ca/en/>.

³ Environics Analytics 2012, quoted in <http://www.investnorthumberland.ca/en/siteselectors/siteselectiondata.asp>.

⁴ Statistics Canada 2011, quoted in <http://www.investnorthumberland.ca/en/siteselectors/siteselectiondata.asp>.

car.³ Its population density is - low, at 43.1 per square kilometre.⁴ Census figures indicate that Northumberland experienced a 1.4% growth in population from 2006 to 2011, and has a median age five years higher than the provincial average.⁵ The County is characterized by a relatively high home ownership rate, and has employment rates comparable to, or better than, the province as a whole. The majority of residents work either in their home municipality or in other municipalities within the County, and travel is highly car-dependent. Education and income levels are below those for Ontario, both for two-parent and single-parent families. Almost 10% of children in Northumberland County live in poverty.⁶ About 11% of Northumberland County residents are immigrants, with over 70% of them having originated in the U.K. and Western Europe. Approximately 2% of the population are visible minorities.⁷

Local Governance Structures

The County of Northumberland is the upper-tier level of municipal government for seven municipalities:

- Township of Alnwick/Haldimand
- Municipality of Brighton
- Town of Cobourg
- Township of Cramahe
- Township of Hamilton
- Municipality of Port Hope
- Municipality of Trent Hills

Economy

Northumberland is a relatively prosperous county, with a strong tourism industry and a vibrant agri-business sector, in which dairy is the main commodity. There is a mix of other industries, including finance, insurance and real estate, wholesale and retail sales, transportation, plastics, energy, food and paper processing, and communications.⁸

Culture

History and culture are a strong presence in Northumberland County through architectural preservation, performance venues, festivals and galleries. Native culture is celebrated through the Alderville First Nation festivals. There is also a rich history of community action and volunteerism. Northumberland County offers historic walking tours and natural heritage areas such as the Trent-Severn Waterway and the Trans Canada Trail.⁹

Major Travel Destinations

Northumberland is one of the top five regional tourism destinations in Ontario, offering “*natural beauty, pristine waterfront and beaches, unique accommodations, diverse restaurants and a vibrant array of unique cultural festivals and events. It has 2 provincial parks, 11 golf courses, 15 conservation areas and 37 trails that total over 1,000 km. Both Cobourg and Port Hope offer live performances in heritage buildings.*”¹⁰

Cobourg and Port Hope are main travel destinations for medical appointments, shopping and entertainment.

⁵ Northumberland County 2013 Business Plan & Budget, p. 7. http://www.northumberlandcounty.ca/en/departments_countyadministration_corpservices/resources/2013Econ_Tourism_Business_Plan.pdf.

⁶ Northumberland County Community Picture 2011. Prime Times Strategies Inc. March 14, 2011 <http://www.hkpr.on.ca/Portals/0/PDF%20Files%20-%20CDIP/Northumberland%20County%20Community%20Picture%202011.pdf>.

⁷ Northumberland County Economic Development Demographics Report Generator: <http://www.investnorthumberland.ca/en/dtool/demographicstool.aspx>.

⁸ Northumberland County eBook; Northumberland County Economic Development, p.5 <http://www.investnorthumberland.ca/eBook/index.html#/1/>.

⁹ Northumberland Tourism. http://northumberlandtourism.com/en/cultureHeritage/Culture_Heritage.asp.

¹⁰ Ibid.

Local Transportation Context

Northumberland is a mix of rural and urban communities, and is “comprised of small villages, century old farms, heritage buildings as well as new homes, industries, businesses and a new state-of-the-art hospital.”¹¹ Two largely urban municipalities are in the southern part of the County: the Town of Cobourg and the Municipality of Port Hope. The Townships of Alwick/Haldimand, Cramahe and Hamilton and the Municipalities of Brighton and Trent Hills are predominantly rural communities.

Highway 401 runs through the 52-kilometre width of Northumberland County near its southern border, forming its main transportation corridor.¹² Other major roads connect the towns in the county, the four largest of which are spread out along the southern boundary of the county, on Lake Ontario.

The County of Northumberland is currently developing a Transportation Master Plan (TMP) which will assist County Council and staff in establishing and prioritizing the future needs of their transportation infrastructure.¹³

C. Background

Local Transportation Issues

Discussions of rural transportation in Northumberland County date back many years. In July 1999, a committee of community partners including municipal representatives, members of non-profit organizations working with children, teens, adults, the disabled and the elderly, the local health unit and hospital put together the Northumberland Community Transportation Action Plan (CTAP). The plan “encouraged co-operation of all community organizations; the joint sharing of both physical and human resources

such as vehicles, volunteers, maintenance, training and dispatch; consolidation of transportation planning and service delivery into a single existing or new organization”.¹⁴ Unfortunately, although the development of the plan was financed by the Ontario government, no funds were available to implement the plan.

In 2004, more than 30 people including representatives from area municipalities and various non-profit health and social service agencies attended an information session on rural transportation issues and ways to tackle them. The session was hosted by the Haliburton Kawartha Pine Ridge District Health Unit and featured Harry Gow, an advocate of rural transportation and co-founder of Transport Action Canada (formerly Transport 2000), a non-government organization that advocates for sustainable transportation. Mr. Gow spoke about the rural transportation planning that was undertaken in western Quebec, noting that “*lack of an adequate transportation system affects quality of life and determines a person's ability to access housing, jobs, health services and leisure programs...the problem was compounded in rural areas where lack of transportation resulted in missed medical appointments and even in difficulty in eating well because of lack of transportation to a grocery store.*”¹⁵

The Northumberland United Way released its Community Matters Report in 2006. In phase 1 of the community consultation process, community leaders, volunteers and elected officials had been invited to consultation sessions held in each of the seven municipalities within Northumberland County to identify priority community issues. The results showed that transportation was cited as one of the three top issues by participants in six of the seven locations.

¹¹ Northumberland United Way. Northumberland Matters: Community Consultation Final Report. 2006. p.6: <http://www.northumberlandunitedway.ca/Portals/0/CM%20-%20Final%20copy%20%20Sept.%2019th,%202006.pdf>.

¹² Northumberland County eBook; Northumberland County Economic Development: <http://www.investnorthumberland.ca/eBook/index.html#/1/>; p.1.

¹³ County of Northumberland: Transportation Master Plan http://www.northumberlandcounty.ca/en/departments_publicworks/TMP_master_plan.asp.

¹⁴ Northumberland News. May 26, 2004. <http://www.northumberlandnews.com/news-story/3770165-county-groups-told-to-go-after-funding-to-meet-rural-transportation-ne/>.

¹⁵ Ibid.

Phase 2 involved an extensive community survey, which was launched in February 2006 along with a strong outreach strategy. Over 1,064 surveys were received and over 1,200 written comments. For the county overall, more than a third of the respondents identified transportation as one of the top three issues they would like to see addressed. In four townships; i.e. Alnwick/Haldimand, Cramahe, Trent Hills, and Brighton it was listed as a top priority by 37%-46% of respondents. Cobourg and Port Hope are the only areas in Northumberland County with public transportation systems. In the survey report it was noted that between 17-32% of respondents indicated that “access to public transportation” was “not applicable”, leading the researchers to wonder if the number of respondents who see it as a major issue is understated. Some residents may have interpreted the question as not applicable to them because they lived in areas without public transportation. The report also revealed that youth are strongly affected by access to transportation. “Availability of Transportation to Activities for Youth” was reported by 34% of Northumberland respondents as a major issue for their community.

Background of Current Initiative

In response to the community studies that indicated that public transportation was a major issue throughout most of the county. In 2008 CCN along with a small group of community agency partners that formed the Northumberland Transportation Initiative (NTI). Community Care Northumberland took on the lead agency role, and with funding from Ontario Disability Support Program (ODSP) - Employment Supports to hire a Project Coordinator.

The NTI was one of four individual transportation programs operated by CCN, the purpose of which was to transport clients to destinations within Northumberland County as well as outside the County for medical, social, banking, recreational purposes and activities of daily living requirements. The other three programs were:

1. **Venture Van** – operating primarily in Trent Hills to service the transportation needs of adults with disabilities

2. **Aging at Home program** – operating primarily along the Lakeshore area of Northumberland County to service the transportation needs of seniors and adults with disabilities
3. **Volunteer Transportation Program** – operating with volunteer drivers who provided transportation to seniors and adults using their personal vehicle.

An NTI steering committee was formed and a review was conducted of transportation studies and reports that had been completed in Northumberland County. The Coordinator researched and spoke with other surrounding transportation services to learn how they operate, including Durham Specialized Transit, Kawartha Lakes & Peterborough Community Care, Quinte Access, Deseronto Transit, North Central Hastings Transit, Cobourg and Port Hope Transit. They learned early in their development process that collaboration and support from organizations and municipalities and sustainability of the service are the keys to success.

The Coordinator met with key informants from organizations and service providers throughout Northumberland County as well as the Northumberland Poverty Reduction Action Committee (NPRAC). They observed that many of their clients living in the rural areas had few or no affordable transportation options. To get a sense of where there was the greatest need for transportation services, organizations were asked which municipality had the highest requirements for this transportation. Cramahe and Trent Hills were at the top of the list, so these were among the first communities to receive service from NTI, with the pilot starting in Cramahe Township in November 2008 and operating two days per week.

Recently, CCN staff recognized that, with the immense growth in demand for these services throughout Northumberland County, they must change the way they operated their transportation programs. Consequently, they consolidated operations into new categories to better service Northumberland County as a whole.

With a regional approach in mind, CCN now has two programs within its portfolio of services under the transportation program.

1. Volunteer Driving Program

This program has remained unchanged in its operation. A volunteer driver provides transportation using their personal vehicle. They transport clients to destinations within Northumberland County as well as outside the County for medical, social, banking, and recreational purposes and to meet the requirements of daily living. Volunteers provide door-to-door service as needed. This service is available to adults who are aging, have special needs or are recovering from illness or injury, with priority given based on assessed need. To access the service, clients contact their local CCN office to book a ride. The local CCN office organizes all scheduling related to this program and requests that clients provide advance notice to book their rides.

2. Specialized Transportation

This program has been consolidated into two components and includes transportation for both accessible and rural needs.

a) Accessible Service: This program transports clients to destinations within Northumberland County as well as outside the County for medical, social, banking, recreational purposes and activities of daily living requirements. Clients are driven by trained staff in agency vehicles which can accommodate wheelchairs, walkers and child car seats. One attendant can ride free. This service is available to clients who are unable to walk a distance of 175m (575 ft.) and climb three or more steps, have physical challenges or condition(s) of functional impairment that severely limit their mobility or are unable to use conventional transit because they carry oxygen or require escort accompaniment.

b) Rural Service: Working with the County of Northumberland and several local municipalities, the goal of this service is to offer rural transportation within the County that is affordable, accessible, and sustainable for all residents of

Northumberland County. Services are pre-booked and clients are driven by trained staff in agency vehicles. Wheelchairs, walkers, child car seats, etc. can be accommodated. The rural service is currently operating in Cramahe & Alnwick/Haldimand Townships as well as the Municipality of Trent Hills, with limited transportation to/from the Municipality of Brighton. Riders must be registered to use this service and those under 16 years of age must be accompanied by an adult. Bookings are handled through a centralized scheduling office that serves all residents across the County. The scheduling office has information on each registered client's needs and appropriate resources are booked to ensure each individual client's needs are met (e.g., whether they require an accessible vehicle.)

Focusing on the rural component of CCN's Specialized Transportation Program, the Rural Service program goal remains unchanged from its former NTI incarnation. It continues to implement an affordable and coordinated rural transit service in Northumberland County, in which each municipality participates and contributes to a single, integrated rural transit service. The service is available to anyone who resides in the county, as well as visitors to the county, but pre-registration is required. Currently six vans with paid drivers provide a service in Cramahe Township, Alnwick/Haldimand Township and the Municipality of Trent Hills. The service operates four days a week between 8:00 a.m.-6:00 p.m. ¹⁶

Initial Funding Sources

Community Care Northumberland, with funding from ODSP, initiated a pilot rural transportation project in November 2008 in Cramahe and provided the use of one of their vans. The cost of running the van was mostly operational (i.e., gas, insurance, maintenance), and these costs were paid from funds received from the Local Health Integration Network (LHIN), which funds 50% of Community Care's budget.

¹⁶ Community Care: <http://www.commcare.ca/node/19>.

In 2010, an \$80,000 grant was received from the Ontario Trillium Foundation, of which \$20,000 was spent on a wheelchair-accessible van and \$60,000 was spent on operating costs for an expansion of their services. They also received a \$20,000 grant from Northumberland Community Futures Development Corporation and a \$5,000 contribution from Northumberland United Way. This helped them to purchase a van that could be dedicated to the rural program.¹⁷

The NTI Coordinator also approached both the Townships of Cramahe and Alnwick/Haldimand to request financial support for the program, and suggested that they apply for Gas Tax funding from the provincial government. The Gas Tax funding allowed the program to continue past the pilot stage and is critical to its ongoing operation.

D. Current Operations

Fleet

The Specialized Transportation Program has six vans, four of which are accessible. Vans travel about 90,000 kilometres on one route in one year. All of the vans have travelled over 300,000 kilometres and are projected to last five years. The Community Care Northumberland Transportation Coordinator stated that there is a substantial difference in capital and operating costs of accessible versus non-accessible vans.

Specialized Transportation staff are always thinking about whether they have the right vans to run the service efficiently. At the time this case study was written it had just been announced that Community Care Northumberland had the use of a Kia van for two years, which will be used primarily to transport people for dialysis treatments.

Routes

Rural service began under the Northumberland Transportation Initiative, piloted in 2008 in the Townships of Cramahe and Alnwick/Haldimand, running two days per week. Trent Hills was added in 2010 and another two days of service were added; the service now runs four days per week. They are planning to add the fifth day, but



their philosophy has been not to grow too big too fast, and to maintain a focus on sustainability.

Because so much of the county is rural, it was decided that having set routes would be impractical. Many people live quite a distance from even a side road, and many others would not be able to walk to the main highway to be picked up by the bus. Those with children need to bring car seats and strollers, and would not be able to walk very far to catch the bus. Thus, they designed a pre-booked service, with advance notice required, and the daily schedule is derived from the bookings. Some of the riders have made regular bookings, so that some of the routes are now fairly predictable. This allows additional flexibility in that people will sometimes call the same day to check if the van is coming around anyway, and, if so, will ask for it to pick them up too.

Community Care Northumberland has been careful not to duplicate existing transportation services but to connect with them. Some cooperative arrangements have been developed; for example, Cobourg Transit provides free passes to CCN rural riders. Riders use the service to get to:

- Appointments (medical, social services, physiotherapy, dentist, dialysis, mental health)
- Educational programs (e.g., upgrading programs at a Resource Centre, Cobourg Fleming College)
- Community Living - recreation and leisure activities
- Shopping/banking
- Job search seminars

¹⁷ Northumberland Transportation Initiative Media Release, June 4, 2010: <http://cramahe.civicwebcms.com/sites/cramahe.civicwebcms.com/files/media/Northumberland%20Transportation%20Initiative%20-%20Media%20release.pdf>.

- Other transportation systems (e.g. VIA train, Cobourg Transit)
- Family, friends and tourist destinations
- Work
- Recreational activities

Ridership

Transportation is provided for families, youth, seniors and adults. Riders use the service to attend appointments, meetings, work, school, social activities, shopping and recreation programs. Most of the riders on the rural route that do not require an accessible vehicle are individuals with low incomes who do not own a car. The majority of those who use the accessible vans are individuals who use wheelchairs.

Pre-registration is required to use all the transportation programs including the rural service. Registration forms are available at most service agencies, local libraries, post offices and arenas in the service area, and online at www.commcare.ca as well as the Cramahe Township, Alnwick/Haldimand & Trent Hills websites. The application asks for information about the purpose of their travel, medical conditions, if mobility aids are used, whether an attendant is required, the ages of any children and whether or not a car or booster seat will be required. No financial information is requested. This information is needed to ensure that the appropriate van is booked, that the driver is informed about the needs of the riders, for insurance purposes and to collect statistics to report to funders. The information in the registration form is confidential.

Once they are registered, people call the office to book a ride. Advance notice is required. If no one has booked a ride the van is not used. Rides can be provided to up to 10 people at a time.

Rural Transportation

Fares are paid when the rider boards the van, or the rider may obtain a pass from an agency that has purchased a block of passes for its clients. Employment agencies, Ontario Works, schools, Children's Aid Society and Training and Development Centres have purchased passes

from Community Care Northumberland's Specialized Transportation Service.

A one-way fare within a route is \$5.00 per person. If a rider crosses over to another route, she/he would pay the additional fee of \$5.00 each way per person. For example, a ride from the Trent Hills area to Cobourg is \$10.00 each way. Children under 16 are only charged \$2.50 one way, and family rates are negotiable.

Accessible Transportation

Fares are either paid directly to the driver, or the local Community Care office bills the third party organization (e.g., ODSP, Ontario Works or insurance companies). Some clients are invoiced directly.

The fee is based on \$0.37 per kilometre, and the client is to pay for parking if applicable because the vehicle stays with the client. If a rider is attending an appointment that takes longer than an hour (e.g., a specialist appointment in Toronto), she/he is charged an additional \$15.00 per hour to cover drivers costs as these drivers are paid staff.

Volunteer Transportation Program

For this program, fares can also be paid either directly to the driver, or the local Community Care office bills the third party organization (e.g., ODSP, Ontario Works or insurance companies). Some clients are invoiced directly.

The fee is based on the rate of \$0.37 per kilometre, and the client is responsible for paying for parking if applicable.

Organizational Structure

Approximately 50% of the operating costs of Community Care are funded by the Central East Local Health Integration Network (LHIN). Other sources of funding include fees for some of the programs and fundraising, and the provincial Gas Tax fund for the Specialized Transportation Rural Service. Monthly reports are submitted to Community Care and the participating municipalities, and annual reports to the Canadian Urban Transit Association and the Ministry of Transportation of Ontario.

The Specialized Transportation Program works in partnership with:

- Northumberland United Way
- YMCA Early Years
- The Help Centre
- Haliburton Kawartha Pine Ridge District Health Unit
- ODSP Employment Supports
- Northumberland Community & Social Services
- Port Hope Community Health Centre

The Specialized Transportation program has a centralized scheduling office located in Campbellford. The former NTI, Venture Van and Aging at Home transportation programs were merged into one specialized transportation program with the goal of increasing overall efficiency. Previously, scheduling was done in three different locations; now a centralized system allows the staff to get the right vans on the right routes with the right people.

The fact that the service is being offered by CCN is a factor in its success. The organization is sensitive to a wide range of needs, and provides professional drivers and a service that is open to anyone.

The staff composition consists of:

- 1 full time scheduler working 35 hrs/week
- 1 part time scheduler working 7hrs/week
- 2 full time coordinators each working 35 hrs/week
- 1 lead driver working 35 hrs/ week
- 7 part time/casual drivers (hours vary)

The merger of the three Community Care transportation programs, led to a re-branding as the Community Care Northumberland's Specialized Transportation Program. This rebranding is an ongoing communications project for Community Care Northumberland as staff continue to educate residents of Northumberland County that the goals of the former NTI service still exist under this new program name.

Operating Costs and Revenues

Operating costs for the specialized transportation program include wages and benefits for staff and drivers as well as the cost of fuel, insurance, licenses and maintenance.

For example, an average trip of 25 minutes is estimated to cost \$28.00/per rider.

The bulk of the revenue for the operation of the specialized transportation program is obtained from the three participating municipalities (Township of Cramahe, Township of Alnwick/Haldimand and the Municipality of Trent Hills). Each municipality combines allocations from their municipal budgets with funds received from their portions of the provincial gas tax fund. The specialized transportation program issues invoices to the municipalities for their portion of the service monthly, along with a report on ridership statistics.

The participating municipalities have been very supportive as they see the value of transportation services to their residents. Although they have expressed some concern about residents shopping in other communities rather than spending their money locally, they also recognize that the transportation service increases the quality of life in their communities.

In addition to the Ministry of Transportation Gas Tax funding through the municipalities, Community Care Northumberland relies on financial support from a number of sources for its Specialized Transportation Program, including:

- Central East LHIN
- Northumberland United Way
- Northumberland County and local municipalities
- Ridership
- Fundraising and donations

Impacts

The main impacts of the Specialized Transportation Program can be found in health, employment, education and social areas. The program enables many people to live healthier and more independent lives. It also creates more opportunities for socializing with other community members, which generally has a positive effect on mental health.

The environmental impacts of the Specialized Transportation Program are minimal, but there is a significant economic impact to individuals with low incomes that use the service. The program not only provides affordable transportation, it also enables them to seek employment and upgrade their skills and qualifications, which may lead to enhanced employment opportunities. In turn, increased rates of employment benefit the local economy.

Community Support

The Specialized Transportation Program has garnered a relatively high degree of support within the county. There seems to be a broad understanding that without transportation services, people will have to move to be closer to medical and other services when they become older, disabled or otherwise unable to drive. While it is costly to operate, a transportation service provides access to many things that are critical to a high quality of life, such as employment, medical and other professional services, groceries, educational programs and leisure activities.

The Coordinator speaks at least once a year with County Council to update them on the service and its benefits. Clients have also spoken at Council meetings so the Councillors can hear about the impact it has had on their lives. For example, one woman spoke about how the rural service has enabled her to continue to live in her own home in the country.

E. Future Considerations

Community Care Northumberland has incorporated a variety of strategies to become more efficient and diversify its funding sources, yet concerns about their future sustainability remain. Also, the demand for service has steadily increased over the past few years. Additional funding sources will be required just to maintain the specialized transportation program's current operations, but they would also like to respond to increasing demand by adding routes in other areas of the county.

CASE STUDY #3

Corridor 11 Bus

Information for this case study was provided by
Shonna Caldwell, Program Information Manager, Muskoka Community Services



A. Overview of Transportation Initiative

The Corridor 11 Bus serves the 125-kilometre stretch of Highway 11 that runs between Huntsville at the north end and Barrie at the south end. The purpose of the bus is to provide a coordinated transportation option for Muskoka residents, specifically along the Highway 11 Corridor. It is operated by Hammond Transportation, under contract with the District Municipality of Muskoka. It operates Monday to Friday, making stops along the way in Bracebridge, Gravenhurst, Washago and Orillia.

B. Community Profile

The District Municipality of Muskoka, located in Central Ontario, was established as an upper-tier municipality on January 1, 1971.

Geography

The District Municipality of Muskoka is 4,761 square kilometres in size. It extends from Georgian Bay in the west to the western border of Algonquin Provincial Park in the east, and from the Severn River in the south to Novar in the north.¹

Located on the southern edge of the Canadian Shield, Muskoka is comprised of diverse ecosystems, including approximately 1,600 lakes, numerous rivers, wetlands,

forests and barrens. For over 100 years, Muskoka has been a popular destination, drawing over 2.1 million visitors annually.

Political Structure

The regional government seat is Bracebridge, and the largest population centre is Huntsville. There are six municipalities in Muskoka: the Towns of Bracebridge, Gravenhurst, and Huntsville; and the Townships of Georgian Bay, Lake of Bays, and Muskoka Lakes. The Wahta Mohawk Territory and Moose Deer Point are also in the district.²

Demographics

Approximately 60% of Muskoka's population of 142,423 is considered seasonal, while the remaining 40% is permanent. The seasonal population is generally much more affluent than the permanent population, who face many of the same day-to-day cost of living challenges that others in northern and rural Ontario face.

Authors of *Dispelling the Myth and Closing the Gap* report that, between 2007 and 2012, the Ontario Works caseload increased by 95%, the highest caseload growth "in any of the 47 upper-tier service providers in Ontario." They also report an above-average number of cases in the Ontario Disabilities Support Program caseload.³ They further note

¹ The District Municipality of Muskoka. *Dispelling the Myth and Closing the Gap: The District Municipality of Muskoka* Submission to the Province of Ontario. March 2013.

² http://en.wikipedia.org/wiki/District_Municipality_of_Muskoka.

³ The District Municipality of Muskoka. *Dispelling the Myth and Closing the Gap: The District Municipality of Muskoka* Submission to the Province of Ontario. March 2013.

Municipality	Permanent Population	Estimated Seasonal Population	Estimated Total Population	% Seasonal
Bracebridge	15,414	7,500	22,914	32.7%
Georgian Bay	2,482	15,958	18,440	86.5%
Gravenhurst	12,055	12,551	24,606	51.0%
Huntsville	19,056	6,833	25,889	26.4%
Lake of Bays	3,506	12,801	16,307	78.5%
Muskoka Lakes	6,707	27,561	34,268	80.4%
District of Muskoka	59,220	83,203	142,423	58.4%

From: The District Municipality of Muskoka Growth Strategy, January 2014.⁵

that, “Year-round residents struggle to make ends meet on lower than average incomes and high housing costs.”⁴

Muskoka’s population is older than the provincial average. For example, 38% of Muskoka’s permanent population is over the age of 55, compared with the Ontario average of 27%. Similarly, 22% is over the age of 65, compared with the provincial average of 15%.^{6,7}

Major Industries

Given the natural assets, numerous resorts, parks and abundant recreational opportunities, it is not surprising that the main driver of the local economy is tourism. This, in turn, is helping to fuel growth in residential and commercial developments as more and more people are visiting year-round as well as building year-round vacation homes and cottages. On its own, the tourism sector was

responsible for employing 57% of the labour force in 2001. Next to tourism, light manufacturing and a growing service sector are helping drive the local economy.⁸

Although the tourism sector has been a boon to the local economy, officials have also identified that the jobs associated with tourism are relatively low-paying. The median earnings in Muskoka are 78% of the provincial average, and the unemployment rates have been among the highest in Ontario.⁹

Additional economic development challenges reported for the region include a “lack of diversification, rising assessment values, labour shortages, lack of affordable housing, lack of telecommunications infrastructure in rural areas and the high costs of developing road, water and sewer infrastructure.”¹⁰

⁴ Ibid.

⁵ Watson & Associates Economists Ltd. The District Municipality of Muskoka Growth Strategy: 2013 Phase 2 Update. January 10, 2014. <https://muskoka.civicweb.net/Documents/DocumentDisplay.aspx?ID=22901>. Accessed July 28, 2014.

⁶ The District of Muskoka Demographic Profiles, p. 16: <https://muskoka.civicweb.net/Documents/DocumentDisplay.aspx?ID=17449>.

⁷ Lura Consulting Transportation in the District of Muskoka: Current Conditions, Gaps and Opportunities. October 2011.

⁸ The District Municipality of Muskoka. Dispelling the Myth and Closing the Gap: The District Municipality of Muskoka Submission to the Province of Ontario. March 2013.

^{9,10} Ibid.

C. Background

Local Transportation Issues

In June 2011, the District of Muskoka engaged the community in a visioning exercise to help identify priority areas for planning purposes. Of the eight priority areas reported, transportation was identified as one with the recommendation to “Provide options for everyone to move around Muskoka that are efficient and safe, including public transit.”¹¹

In October 2011, a report outlining the transportation needs and opportunities in Muskoka was released. Research for the report consisted of a transportation services inventory, results from community service provider interviews and a survey, and a gap analysis. The inventory identified a number of transportation services within four main categories:

1. Public/Municipal, including Huntsville Transit’s fixed-route system that operates Monday to Friday; the Bracebridge Trolley (aka Santa’s Trolley), which operates between Victoria Day and Labour Day and is a partnership between the Town of Bracebridge and Santa’s Village; Ontario Northland, which is a coach bus service operating year-round along the major corridors of Highway 69 and Highway 11; and Go Transit, which operates a train service between Toronto and Barrie.
2. Private, including Hammond Transportation, which operates a number of services in Muskoka; eight private taxi companies; the Muskoka Water Taxi, which operates from springtime to November; First Student Canada Bus; and employer-employee services offered through Deerhurst Resort and Taboo Resort.
3. Health Care, which is limited to volunteer driver services for The Pines Long-Term Care

Residence; and chartered vehicles from Hammond Transportation for Leisureworld Caregiving Centre.

4. Community Service-based, including volunteer-based services offered through Canadian Cancer Society – Simcoe Muskoka Unit, Canadian Red Cross Society – Simcoe Muskoka Branch, the District of Muskoka Community Services, Muskoka Family Focus, Muskoka Parry Sound Community Mental Health Services and Muskoka Seniors. Additionally, Community Living South Muskoka provides transportation as part of core support services, with staff being licensed to drive vehicles within the agency’s fleet.

Transportation Issues in Muskoka

Researchers identified a number of population groups as well as geographic areas that were under-served in the Muskoka region. Among the priority populations requiring greater service were:

- Low-income individuals, including those who are eligible for support from Ontario Works
- Seniors
- People with disabilities
- Women (notably sole support)
- Youth

Key among the geographic areas underserved was Georgian Bay. The researchers note, “The Georgian Bay region is particularly lacking in transportation services with only one taxi company operating out of Midland, Ontario Northlands stopping only in Port Severn, and a fixed mini-bus route from Honey Harbour to Midland once a week.”¹² They also note the limited service to more remote communities such as Dwight, Dorset, MacTier, Severn and Novar; and the limitations for the larger centre of Gravenhurst.

¹¹ District Municipality of Muskoka Planning and Economic Development. Muskoka Moving Forward: Visioning for the Future – Community Engagement Report. June 2011. Accessed June 20, 2014: <https://muskoka.civicweb.net/Documents/DocumentDisplay.aspx?ID=16873>; also, Muskoka Moving Forward: Visioning for the Future Summary Document. Accessed June 20, 2014: <https://muskoka.civicweb.net/Documents/DocumentDisplay.aspx?ID=16872>.

¹² District Municipality of Muskoka Planning and Economic Development. Muskoka Moving Forward: Visioning for the Future – Community Engagement Report. June 2011. Accessed June 20, 2014: <https://muskoka.civicweb.net/Documents/DocumentDisplay.aspx?ID=16873>.

The researchers also report the daily challenges that limited transportation presents to residents, including difficulty in searching for and maintaining a job, staying physically and mentally healthy, supporting children's healthy development, improving standards of living, maintaining independence and volunteering in the community. They note, "It was evident [from the research] that transportation is an important social determinant of health and well-being for Muskoka residents, and the impacts from lack of transportation can cascade through many facets of life."¹³

Additionally, the research pointed to gaps related to awareness of existing transportation services provided by agencies, both by the general public and by agencies and service providers themselves. Volunteer-driver recruitment and training for the various volunteer-based transportation programs was also identified as an issue.¹⁴

Opportunities and Assets

Service providers were asked to comment on strengths and opportunities that could be leveraged for developing a coordinated transportation program in Muskoka. Among the opportunities and assets reported were the following:

- Commitment on the part of agencies involved with the regional transportation committee to finding a solution to the shared transportation challenges
- Geographic proximity of the different agencies to each other, which could help facilitate sharing and pooling of resources
- A sense of momentum related to the work already completed to address the challenges
- A strong volunteer base

- Potential funding opportunities, particularly through the Local Health Integration Network.¹⁵

The researchers identified the most frequently traveled routes as reported by the service providers. The greatest concentration of trips was along Highway 11 as far south as Barrie, with occasional trips to Toronto for medical appointments.¹⁶ Key among the travel needs along this corridor were trips to Barrie and Orillia for students to attend Georgian College, employment opportunities and medical appointments.¹⁷

Initiative Background

The final report prepared by Lura was presented to the Inter-Agency Transportation Committee in October 2011.¹⁸ Among the recommendations from the research were three possible initiatives:

1. Expansion of the volunteer driver program among agencies, the funds for which would be ideally obtained through an Ontario Trillium Foundation (OTF) grant
2. Sharing of agency vans, also part of the OTF application
3. Developing an inter-town/city bus to address the various travel needs, including medical, social, training and employment.¹⁹

According to Rick Williams, Commissioner of Community Services, in a report to the Community Services Committee of the District Municipality of Muskoka, Hammond Transportation had submitted a proposal to the Municipality for introducing the inter-town bus service on a trial basis between September and December of 2012. The proposal was to have one bus making two trips daily

¹³⁻¹⁶ Ibid.

¹⁷ Telephone interview with Shonna Caldwell, Program Information Manager, Muskoka Community Services. June 17, 2014.

¹⁸ Among the organizations involved with the Committee were Red Cross; Muskoka Seniors; Family, Youth and Child Services of Muskoka; Muskoka Family Focus; Community Living Huntsville; Community Living South Muskoka; Hammons; the Township of Georgian Bay; and the District Municipality of Muskoka.

¹⁹ Rick Williams, Commissioner of Community Services, staff memo to Chair and Members of the Community Services Committee. July 9, 2012 (Report No: CS-7-2012-7). Accessed electronically, June 25, 2014.

between Huntsville and Barrie, Monday to Friday. It was estimated that the break-even number of travellers would be approximately 25 per day, depending on ticket prices and distances travelled. Williams noted, “Hammonds suggest that, given industry experience, they would have a good sense of viability and sustainability of the route after 10-12 weeks.”²⁰

Initial Challenges

The Corridor 11 Bus debuted on September 24, 2012. However, the service had to be suspended on October 17, following what Hammond Transportation referred to as “opposition by a current existing licensed carrier.”²¹ They suspended operations “until an application for a permanent license could be submitted and reviewed by the Ontario Highway Transport Board (OHTB).”²² The Bus resumed its twice-daily route on December 3, 2012.

D. Current Operations

The Corridor 11 Bus has now been operating for almost two years in a three-year pilot project. In April 2013, the service was expanded. In a media release from March 27, 2013, Hammond Transportation reported the following:

“Starting on Tuesday, April 2, 2013, the last Corridor 11 Bus will now leave from Barrie, heading north, at 4 pm and there will be an additional late afternoon run going south between Bracebridge and Gravenhurst. An additional stop has been added to take riders to the South Muskoka Memorial Hospital in Bracebridge and there is a new, more central, drop-off and pick-up point in Huntsville at 1 King William Street.”²³

Currently, the Corridor 11 Bus runs Monday to Friday. The bus first leaves Huntsville at 6:30 a.m., heading south with stops in Bracebridge, Gravenhurst, Washago, and Orillia, finally arriving at the Georgian College campus in

Barrie at 8:45 a.m. From there, it heads north, travelling the same route with additional stops in Bracebridge, arriving in Huntsville at 11:10 a.m. Another southbound trip begins at 11:15 a.m., arriving at the Georgian College campus in Barrie at 1:40 p.m. An additional southbound trip leaves Bracebridge at 4:20 p.m. with two stops – one in Bracebridge and one in Gravenhurst at 4:45 p.m. The final northbound trip of the day leaves Barrie at 4:00 p.m. and arrives in Huntsville at 6:20 p.m.

One-way fares range from \$4.00 between Orillia and Washago to \$22.00 for a trip between Huntsville and Barrie. Round-trip fares range from \$7.00 to \$43.00.

Seats on the bus can be reserved in advance through Hammond Transportation, and tickets can also be purchased directly from the bus driver.

Ownership and Funding Model

The Corridor 11 Bus is owned and operated by Hammond Transportation. The initiative was developed to help address the overspending in transportation costs by Ontario Works (OW) and Ontario Disability Supports Program (ODSP) clients needing access to transportation (i.e. taxis and gas reimbursement). With the number of clients expected to increase and the costs of transportation to grow significantly, the Corridor 11 pilot project was developed. To support the pilot phase of the initiative, Hammond has received \$15,000 per year from the District of Muskoka for the three years of the pilot, which includes the purchasing of 1,000 tickets per year as a means of providing alternative methods of transportation as well as providing other municipalities with the option to explore similar agreements with Hammond Transportation in the future. These tickets help offset the transportation costs of OW and ODSP clients “who need to get to training, school, medical appointments and job interviews.”²⁴

²⁰ Ibid.

²¹ Hammond Transportation media release, “Corridor 11 Bus Back on the Road with Temporary Complimentary Rides within Muskoka”. November 26, 2012. Accessed June 25, 2014.

²² Ibid.

²³ Hammond Transportation media release, “Corridor 11 Bus Expands Schedule to Meet Rider Needs”. March 27, 2013. Accessed June 25, 2014.

²⁴ Telephone interview with Shonna Caldwell, Program Information Manager, Muskoka Community Services. June 17, 2014.



Current Ridership

It is estimated that 100 passengers are using the Corridor 11 Bus each week.²⁵ According to Rick Williams, this is the desired goal for making the operation sustainable.²⁶

In a media release in December of 2013, Hammond Transportation reported being pleased with the increased ridership over the first year of operation. They identified “some very noticeable trends,” including the following:

- Almost three-quarters of all southbound riders were originating from either Huntsville or Bracebridge.
- The majority of riders were travelling to either Barrie or Orillia, with “almost equal emphasis on travel to one of the Georgian College campuses or a hospital.”
- They also found that the majority of northbound travellers were originating from Soldiers Memorial Hospital in Orillia.

Scott Hammond, Director of Operations, also reported something unexpected: “Although the original intention of the Corridor 11 Bus was to move riders out of Muskoka to select locations in Orillia and Barrie, we found that over a quarter of all riders are using the service to move between locations within Muskoka, such as between Huntsville and Bracebridge or between Bracebridge and Gravenhurst.”²⁸

Rick Williams also reported a number of trends, including the following:

- The District of Muskoka has committed to an average of 10 ticket purchases per week based on current client usage requirements and costs.
- Actual District of Muskoka usage is above projection and is helping to reduce the cost pressures on transportation within the OW budget.
- Usage by the general public is the key to the success of the program. It seems that college student usage has been a good market area.
- Medical appointment usage has been less than anticipated but is growing.
- Promotion for the Corridor 11 Bus continues and with growing awareness it is anticipated that sustainability can be maintained.²⁹

Impacts

Still within the pilot phase of the initiative, an evaluation of the Corridor 11 Bus has not yet been completed; however, one is planned for later in the project to help assess its sustainability. Nonetheless, there are a number of benefits that have been identified to date, including the following comment from Shonna Caldwell, Program Information Manager with Muskoka Community Services about the economic and social benefits:

²⁵ Ibid.

²⁶ Rick Williams, Commissioner of Community Services, staff memo to Chair and Members of the Community Services Committee. January 22, 2014 (Report No: CS-1-2014-4). Accessed electronically, June 25, 2014.

²⁷ Hammond Transportation media release, “Corridor 11 Bus Celebrates One Full Year of Service”. December 23, 2013.

²⁸ Ibid.

²⁹ Rick Williams, Commissioner of Community Services, staff memo to Chair and Members of the Community Services Committee. January 22, 2014 (Report No: CS-1-2014-4). Accessed electronically, June 25, 2014.

“Being in Community Services and social assistance being a big part of our caseload, I can see [the Corridor 11 Bus] has impacted vulnerable people in Muskoka significantly, especially for clients that need to get to appointments or to work. We see it even, for example, people living here in Huntsville and needing to see their case managers in Bracebridge. It has made a significant impact on those that do not have transportation.”³⁰

An additional and somewhat unanticipated community economic benefit is related to employment opportunities. Prior to the Corridor 11 Bus, people without their own means of transportation looking for work would be limited in their options: either they had to find work within a limited geographic proximity to where they live or they would have to leave the Muskoka area. With the introduction of the Bus, officials have found an increasing percentage of riders using the service to search for and take jobs south of the Muskoka region. According to Shonna, “The impact on employability has been significant, and it isn’t something we were expecting, both with general public and our clients. It has motivated people to look outside of Muskoka for work and has opened up the doors of commuting.”³¹

The program has also demonstrated environmental benefits. In addition to the reduction of vehicles on the road, Muskoka Community Services and Hammond have partnered to create reusable tickets. These plastic tickets have an embossed pattern so they cannot be duplicated, but instead of being discarded, they are returned to Community Services from Hammond for reuse. This process also saves the program money.³²

E. Future Considerations

Given that the project is still in its pilot phase, there are no definite plans to implement any changes to the schedule or routes. However, from the ridership analysis, officials have identified a couple of limitations that they would like to consider in the future. The first is addressing the issue of getting people from the outlying areas to corridor stops. “There is an accessibility issue that way. That could be where some of our agencies with volunteer drivers can help get people to the Corridor 11 bus stops. That’s perhaps something for us to look at with partners; developing a Muskoka wide transportation program.”³³

A second limitation with the current schedule is the lack of weekend service. Although the service has been designed to meet the needs of Muskoka residents (hence the Monday to Friday schedule), there is an economic development opportunity for shuttling tourists and visitors to the region on the weekends.

The pilot evaluation to be completed towards the end of 2014 will examine the long-term sustainability of the initiative and explore ways for improving the service.

³⁰ Telephone interview with Shonna Caldwell, Program Information Manager, Muskoka Community Services. June 17, 2014.

³¹ Ibid.

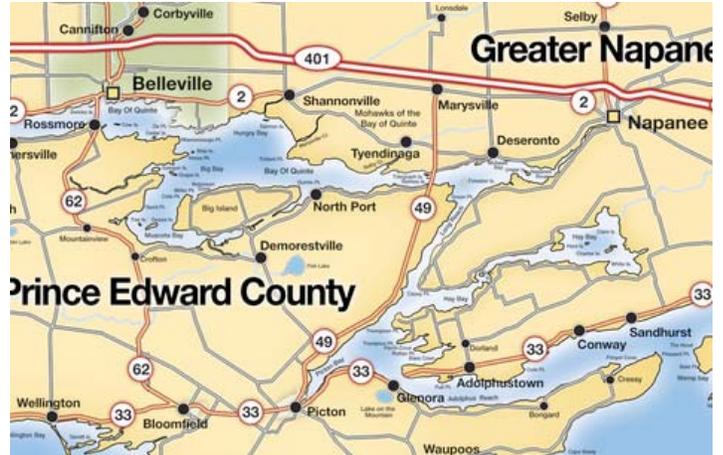
³² Ibid.

³³ Ibid.

CASE STUDY #4

Deseronto Transit

Information for this case study was provided by
Susan Stolarchuk, Transit Administrator, Town of Deseronto



A. Overview of Transportation Initiative

Deseronto Transit is a regional transit service that was established in 2007. Its aim is to provide low-cost affordable transportation that will meet the needs of all individuals in the service area by providing mobility options to ensure access to work, education, health care, shopping, social and recreational opportunities. The service is owned and operated by the Town of Deseronto, and guided by a Transit Committee with representatives from organizations concerned with and/or working to assist low income individuals, seniors and the disabled.

A Transit Administrator oversees all operations and is employed by the Town. Two community buses, both accommodating wheelchairs, and two minivans provide public transportation within the areas of Napanee, Belleville, Picton, Bloomfield, Tyendinaga Territory, Tyendinaga Township and Deseronto. There are two routes with four regularly scheduled service runs each. Departures start at 5:00 a.m. with returns ending at 5:05 p.m. Two late-evening pickup times based on demand and a limited Saturday "share a ride service" booking also exist. Regional fares are based on distance with single fares ranging from \$6.50 to \$12.00.

B. Community Profile

Location

Located on the north eastern shores of Lake Ontario, Deseronto Transit serves a number of communities in the eastern part of the Bay of Quinte area. This area is comprised of several small communities as well as the City of Belleville.¹ It is less than an hour west of Kingston and includes the Mohawk territory of Tyendinaga. In the Mohawk language the area is called "Kenhtë:ke", which means "the place of the bay".²

The northern side of the Bay itself is defined by Ontario's mainland, while the southern side follows the shore of Prince Edward County. The bay runs west-southwest for 25 kilometres (to the town of Picton), where it turns north-northwest for another 20 kilometres (as far as Deseronto). The width of the bay rarely exceeds two kilometres. This area is also a gateway to the Trent-Severn Waterway, a canal connecting Lake Ontario to Lake Simcoe and then Georgian Bay on Lake Huron.³

Population and Political Structures

The greater Bay of Quinte area has a population that exceeds 200,000 ranging from the City of Belleville, with a population of 49,454 and a density of 200.0/km², to

¹ Bay of Quinte Recreation Guide and Business Directory: <http://bayofquinte.com/site/about/>. Accessed March 12, 2014.

² Wikipedia, the free encyclopedia: http://en.wikipedia.org/wiki/Bay_of_Quinte. Accessed March 12, 2014.

³ Ibid.

the Town of Deseronto, with a population of 1,835 and a density of 728.3/km². The area served by Deseronto Transit includes the single tier municipalities of the Town of Deseronto, Tyendinaga Township, Tyendinaga Territory and the City of Belleville (within southern Hastings County); the Town of Greater Napanee (within Lennox and Addington County); and Bloomfield and Picton (within Prince Edward County).⁴

Economy

The Bay of Quinte region is home to a large number of food-processing manufacturers and industries in the plastics and packaging sectors. There are over 350 industries located in the region, and most of these industries are located in and around the City of Belleville.⁵

While the area's primary economic base is manufacturing, it also relies on tourism. Tourism is especially significant in the summer months due to the area's fishing, golf courses, provincial parks and wineries. In particular, Prince Edward County, which includes the towns of Picton and Bloomfield, is Ontario's newest wine region.⁶ The Bay of Quinte also provides some of the best trophy walleye angling in North America.⁷

The Bay, as the Bay of Quinte is locally known, is an area rich in Loyalist history. Native culture and history are also alive and well in this region, both within and around the Mohawk territory of Tyendinaga. These aspects of local history further draw tourists to the area.⁸

Major Destinations

The main sources for employment, health and social services within the region are located in Belleville. For instance, Belleville General, a major hospital for the region, and the Hastings & Prince Edward Counties Health Unit are both within the city. The City of Belleville is also home to a variety of post-secondary schools such as



Loyalist College of Applied Arts and Technology, Maxwell College of Advanced Technology, CDI College and Ontario Business College. Each of these educational institutions serves the greater area of the Bay of Quinte and draws students from throughout the region.

Local Transportation Context

Coach Canada and Greyhound buses and VIA rail services are offered within the area along both the TransCanada Highway (#401 locally) and the Toronto-Kingston route, but service is limited and only travels to and from Belleville and Napanee and not to the smaller communities. Public transportation operates within the urban area of the City of Belleville, through Belleville Transit, but not beyond. There are also taxi services available in Belleville, Napanee and within Prince Edward County. However, the fees are expensive, with a one-way taxi ride to Belleville from Deseronto or Picton costing \$40-68 or \$25-40 respectively.⁹

A newly founded bus company exists in Prince Edward County, offering tours and daily scheduled transport between many popular tourist destinations during the summer months, with rates ranging from \$10-45. However, the focus is not on accessing employment or other essential

⁴ Wikipedia, the free encyclopedia: http://en.wikipedia.org/wiki/Bay_of_Quinte. Accessed March 12 2014.

⁵ Ibid.

⁶ Bay of Quinte Recreation Guide and Business Directory: <http://bayofquinte.com/site/about/>. Accessed March 12, 2014.

⁷ Wikipedia, the free encyclopedia: http://en.wikipedia.org/wiki/Bay_of_Quinte. Accessed March 12 2014.

⁸ Bay of Quinte Recreation Guide and Business Directory: <http://bayofquinte.com/site/about/>. Accessed March 12, 2014.

⁹ Interview with Susan Stolarчук, Transit Administrator, Deseronto Transit, May 2, 2014.

services within the region, and it does not operate year-round. Also, Prince Edward County has become known as a cycling destination for tourists and therefore provides opportunities for local active transportation as well. While most roads do not have designated bicycle lanes, many side roads are paved and flat, providing both fantastic views and stops along the local Tastes and Arts Trails. Given the focus on agriculture in the region, signs are also posted in many areas reminding drivers of slow moving vehicles such as tractors.¹⁰

Like other rural areas within Ontario, the lack of affordable and accessible public transportation options affects everyone, but it is a particular challenge to people with low incomes, the elderly, people with disabilities, and families with children.

C. Background

Previous Public Transportation Initiatives¹¹

Prior to the development of Deseronto Transit, transportation in Deseronto was, and still is, offered for seniors and people with disabilities through a volunteer driver program operated by Community Care for South Hastings. However, wheelchair access is usually not available as volunteers use personal vehicles to provide the service.

A local cab company also operated out of Deseronto until recently, but rising taxi fares made it extremely difficult for those on fixed incomes to get around. Since the cab company went out of business, residents must now request a cab to come from Napanee or Belleville to service their needs, driving the costs even higher. Using a taxi service to maintain employment or attend college is not monetarily feasible. There was also a service provided by Trentway-Wagar Bus Lines with a route to or from Belleville and Kingston once per day, with no same-day return. However, this service is no longer available.



Background of Current Initiative

In 2002, an Interagency Network Group was formed in Deseronto to share resources and attempt to address the challenges faced by residents of the town. For instance, many social and health services available to those living in Deseronto are located outside of the town and have to be accessed through other areas within Hastings County. Additionally, employment opportunities within the Town of Deseronto are limited, with few employers and only one manufacturer employing a small number of people. Belleville is the nearest location to services and also offers increased access to employment, but it is approximately 30 kilometres away.¹²

The Interagency Network Group determined that transportation was a significant barrier for Deseronto residents. They commissioned the study *Deseronto Community Transportation Strategy: An Assessment of Needs*, which was completed in June 2002 and funded by the local United Way. The study demonstrated that transportation was a "major barrier" for 35% of respondents to a survey.¹³

In 2005, Norm Clark, Councillor for the Town of Deseronto, joined the Interagency Network Group. This

¹⁰ Wikitravel, the free travel guide: http://wikitravel.org/en/Prince_Edward_County. Accessed May 2, 2014.

¹¹ This section is from the interview with Susan Stolarchuk, Transit Administrator, Deseronto Transit, May 2, 2014.

¹² Interview with Susan Stolarchuk, Transit Administrator, Deseronto Transit, May 2, 2014.

¹³ Stacey Wagner, Deseronto Community Transportation Strategy: An Assessment of Needs, Quinte United Way, 2002.

was of significant benefit to the goals and objectives of the committee because they could communicate more directly with council. As a result, municipal support for a pilot transportation project was gained at this level.¹⁴

In 2006, Hastings County Social Services received a grant through the Regional Homelessness Initiative Project to develop the *Deseronto Homelessness and Affordable Housing Community Action Plan*. This report was intended to address service gaps in the community for those who were homeless or precariously housed. Statistics revealed that, in 2006, 40.6% of residents in Deseronto were in receipt of social assistance payments. For these individuals, transportation was identified as a barrier to accessing necessary supports and services, employment and education opportunities, as well as basic daily living needs.¹⁵

Referencing the two studies, an application to conduct a pilot transportation project was submitted to the Employment Innovation Fund, which was provided through the Ontario Ministry of Community and Social Services. The proposal was written by Lori Brooks, Job Information Clerk for Hastings County and Frances Smith, CEO for the Deseronto Public Library and was submitted through the Town of Deseronto. In March 2007, a grant for \$225,000 was received and a pilot project was launched. Clear goals and measurable deliverables were set by the funding body. Indicators for success were as follows: 40 Ontario Works (OW) or Ontario Disability Support Program (ODSP) clients were to be employed for 13 weeks, and the transportation service was to become sustainable after December 31, 2007.¹⁶

By the end of the funding period in December 2007, there were 70 job placements obtained and 30 clients no longer needing social assistance. The pilot was not only a

success, it exceeded expectations. As a result, the Town of Deseronto decided to continue to support the service and make it available to the general public.

Initial Funding Sources

In addition to the \$225,000 in seed funding obtained from the Ministry of Community and Social Services Employment Innovation Fund in 2007, there were other forms of assistance that helped to support the creation of a local transportation service initially. In 2008, a generous capital grant of \$85,000 from the local John M. & Bernice Parrott Foundation made an addition to the fleet possible by way of the purchase of a new bus. Also, the federal Homelessness Partnering Initiative provided a capital grant of \$20,000 in 2009.¹⁷

Other contributions were received for operations from the Child Benefit Reinvestment Fund through both Hastings County Social Services and Prince Edward Lennox & Addington Social Services. These were both annual and one time contributions ranging from \$15-35,000. From 2008 to 2012, the Town of Deseronto also contributed a substantial amount annually, with contributions in the \$45-55,000 range. This represented anywhere from 18-26% of total operating expenses. Starting in 2009, funds were also received from the provincial gas tax fund. Between 2009 and 2011, these amounts ranged from \$17-18,500 per year.¹⁸

Local Support for Transportation Initiative

Initial research, through the 2002 study *Deseronto Community Transportation Strategy: An Assessment of Needs*, showed that local support from the community for a public transit service was very positive.¹⁹ Also, the fact that low-income individuals experience barriers to accessing transportation was further recognized at the

¹⁴ Interview with Susan Stolarchuk, Transit Administrator, Deseronto Transit, May 2, 2014.

¹⁵ Hastings County Social Services Affordable Housing Action Network, *Deseronto Homelessness and Affordable Housing Community Action Plan*, Regional Homeless Initiative, 2006.

¹⁶ Interview with Susan Stolarchuk, Transit Administrator, Deseronto Transit, May 2, 2014.

¹⁷ Ibid.

¹⁸ Susan Stolarchuk, PowerPoint presentation: HCLink webinar on March 19, 2014; and Interview with Susan Stolarchuk, Transit Administrator, Deseronto Transit, May 2, 2014.

¹⁹ Interview with Susan Stolarchuk, Transit Administrator, Deseronto Transit, May 2, 2014.

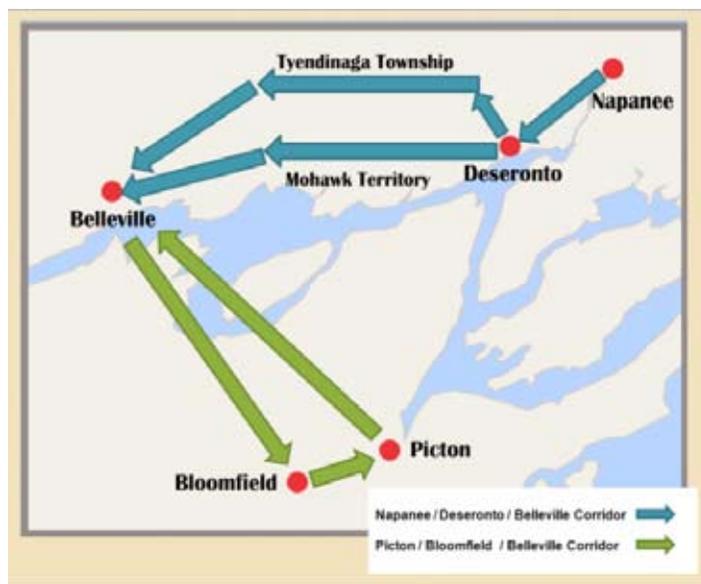
provincial level through a report released in December 2008 called *Breaking the Cycle: Ontario's Poverty Reduction Strategy*. This report stated that "inadequate access to transportation is a key barrier to employment for some social assistance recipients. If people cannot get to work, they cannot work."²⁰ Both of these things helped to justify the establishment of a public transit service locally.

As previously mentioned, initial support at the municipal level was gained through representation from the Town of Deseronto Council when they began participating in the Interagency Network Group. Municipal backing, through both representation and financial contribution, was critical to the success and survival of the service. This was not only important in terms of providing local support, but also because it made Deseronto Transit eligible to receive funding from the provincial gas tax fund.

Also, Deseronto Transit's Management Committee was, and still is, comprised of professionals whose work is concerned with strategies to assist individuals, families, groups, organizations and communities to achieve optimum social functioning. Through members of this committee, many contacts have been made and sources of funding identified. Additionally, being able to list the various organizational members of the Committee on funding applications has both demonstrated collaboration and added a high degree of credibility to proposals.²¹

D. Current Operations

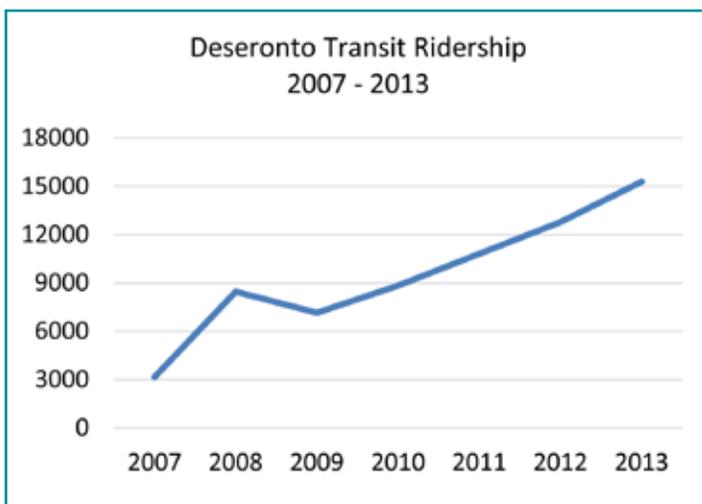
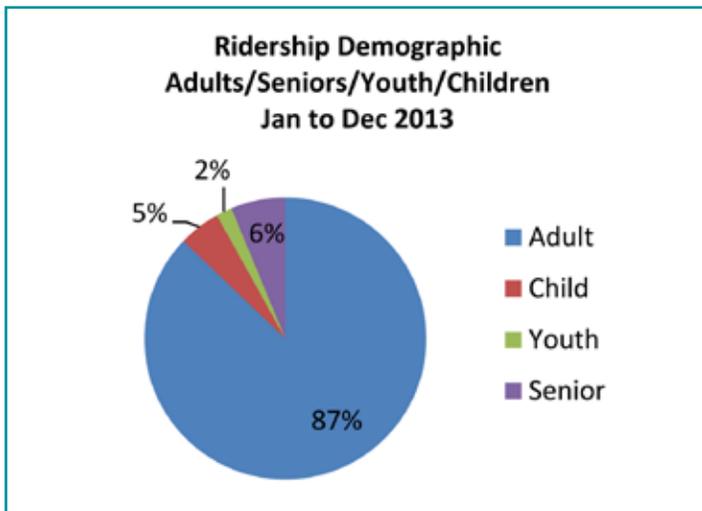
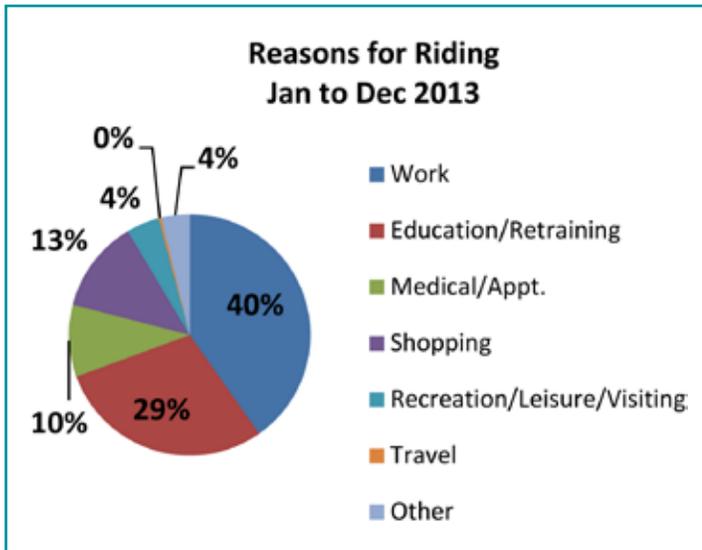
Deseronto Transit serves portions of Hastings, Prince Edward and Lennox & Addington Counties. It is currently a regional transit service that links Napanee, Deseronto, Tyendinaga Territory, Tyendinaga Township, Picton and Bloomfield to Belleville. The system has two main objectives: 1) to provide low cost affordable transportation that will meet the transportation needs of all individuals in the service area by providing mobility options to ensure access to work, education, health care, shopping, social and recreational opportunities, and 2) sustainability. The service is open to all members of the public.



Deseronto Transit is owned and operated by the Town of Deseronto, but it is guided by a committee comprised of professionals who represent organizations concerned with and/or working to assist low-income individuals, seniors and people with disabilities. The Transit Management Committee and the Transit Administrator oversee all operations. The Transit Management Committee is made up of key individuals that have been instrumental to the service's success. Committee members in 2014 include: the Mayor of Deseronto; a Councillor for the Town of Deseronto (Chairperson); the Secretary to the Executive Director of Hastings County Social Services; the Manager of Prince Edward Lennox & Addington Social Services; a representative of the Ontario Disability Support Program; a Job Information Clerk at Hastings County Social Services; a Councillor for the Town of Greater Napanee and a business owner; a Deseronto business owner; and the Transit Administrator (staff). There are also five part-time drivers and one newly added part-time Administrative Assistant.

²⁰ Government of Ontario, *Breaking the Cycle: Ontario's Poverty Reduction Strategy*, December 2008, p.30.

²¹ Susan Stolarchuk, PowerPoint presentation: HCLink webinar on March 19, 2014; and Interview with Susan Stolarchuk, Transit Administrator, Deseronto Transit, May 2, 2014.



Routes and Schedules²²

Deseronto Transit operates two buses (one seating 11 passengers and one wheelchair, the other seating 16 passengers and two wheelchairs) and two minivans travelling along two main corridors operating, and four routes per day through each corridor. The first corridor travels through South Hastings and Lennox & Addington Counties from Napanee, Deseronto, Tyendinaga Township and Tyendinaga Territory to Belleville and back. The second corridor travels within Prince Edward County through Bloomfield and Picton to Belleville (in south Hastings County) and back. Both routes offer two morning departures, an afternoon departure and a return route at the end of the day. Routes were designed to facilitate employment and start as early as 5:00 a.m. with a return time of 5:05 p.m.

While Deseronto Transit is classified as a conventional transit service with a relatively fixed route and set schedules, it also maintains some flexibility using different routes to get to destinations based on client need (along the Deseronto Corridor only). For instance, riders are able to call in their location and the driver will take the route closest to the riders to accommodate them. They also offer door-to-door service for seniors and those with mobility restrictions if their pickup location is close to the service's main route. In addition, the corridor serving the Deseronto area has a pre-booked, shared-ride, night-time service that allows for two additional pickup times that vary based on need. Typical pickup times for this are 9:00 p.m. and 11:00 p.m., but they can run as late as midnight. The night time service was designed to facilitate shift work, but it is also used for shopping, recreation and leisure.

Ridership²³

While the service began only serving clients of Ontario Works and the Ontario Disability Support Program during the pilot project phase, Deseronto Transit is now available to anyone within the general population and has been since 2009. Ridership for the entire year, from January to December of 2013, is reflected in the two pie graphs to the left. As the pie graphs demonstrate, the majority

²² Information in this section provided for the project Environmental Scan: and Susan Stolarchuk, PowerPoint presentation: HCLink webinar on March 19, 2014.

²³ This section is from the Interview with Susan Stolarchuk, Transit Administrator, Deseronto Transit, May 2, 2014.

of riders in 2013 were adults using the service to access employment and education.

Ridership has grown steadily since the start of the service from 3,157 trips taken in 2007 to 15,288 trips taken in 2013. As the line graph on the previous page shows, a sharp increase occurred between 2007 and 2008 because the service became open to the general public after the first year of operation. While ridership numbers may seem small in comparison to larger urban centres, there exist greater barriers geographically to accessing supports, services and employment in rural areas due to a lack of transportation options. As a result, the service provided by Deseronto Transit is critical to many of its passengers in terms of their being able to access employment, various supports, health and social services (including basic daily living needs such as adequate food supplies).

Operating Costs and Revenues

Growth has been experienced in terms of both ridership and revenues. Funding for operation of the service is currently provided by: The Town of Deseronto; The Town of Greater Napanee; Tyendinaga Township; Hastings County; the United Way of Quinte; Prince Edward, Lennox & Addington Social Services (through a commitment to purchase a set number of bus passes per month); and through the provincial gas tax program. As of printing time for this report, talks were also underway with representatives of the Municipality of Picton regarding their potential financial support for the service.²⁴

Contributions made specifically by the Town of Deseronto have ranged from over \$55,000 in the initial year to \$30,000 for 2013. This represents a change from 29% of the overall annual budget in 2008 to 9% in 2013. The Town's contribution has been able to decrease over time, even though service has increased, as a result of

financial contributions from other municipalities as well as resulting increases in provincial gas tax allocations. For example, the situation changed substantially in 2012 when increased financial support was received from the provincial gas tax fund, and the funding allocation increased from \$17,500 in 2011 to \$105,575 in 2012. This was an increase of over 600% in one year and was due to a combination of additional financial support being received from the Town of Greater Napanee and the fact that their population could now be included in the Gas Tax funding formula. This enabled the Town of Deseronto to reduce their financial contribution from 25% to 18% in that same year.²⁵

In terms of revenues from fares, these represent the largest single source of income, generating close to \$110,000 in 2013. Individual fares are based on regional distance travelled and range from \$6.50 to \$12.00. Reduced single fare rates exist for seniors, youth and children, as well as through the purchasing of books of tickets and two-week and monthly passes.²⁶

In 2013, salaries represented the greatest expense for the service, followed closely by the operation, purchase and maintenance of vehicles. The overall operating budget in 2013 was approximately \$330,000.²⁷

Deseronto Transit also provides charters and a range of advertising opportunities in order to obtain additional revenue. Advertising space is available on the vehicles and in the bus depot. Their transit vehicles are becoming increasingly recognizable and visible as they travel through the region many times a day, to populated destinations notably Deseronto, Napanee, Belleville, Prince Edward County, and Tyendinaga Territory.²⁸

²⁴ Interview with Susan Stolarchuk, Transit Administrator, Deseronto Transit, May 2, 2014.

²⁵ Susan Stolarchuk, PowerPoint presentation: HCLink webinar on March 19, 2014.

²⁶ Susan Stolarchuk, PowerPoint presentation: HCLink webinar on March 19, 2014; and Interview with Susan Stolarchuk, Transit Administrator, Deseronto Transit, May 2, 2014.

²⁷ Interview with Susan Stolarchuk, Transit Administrator, Deseronto Transit, May 2, 2014.

²⁸ Deseronto Transit website: <http://deseronto.ca/departments/deseronto-transit/>. Accessed May 4, 2014.



Challenges ²⁹

The greatest challenge operating a public transit service is the high cost. Fares alone do not cover the costs of operation, and a small municipality does not have the tax base to support such a service. Additionally, the formula used to determine the amount of gas tax funds that are allocated includes the population of a region only if the municipalities in the area being served financially support the service. Therefore, even though Deseronto Transit provides regional public transit servicing the areas of Napanee, Tyendinaga Territory, Tyendinaga Township, Bloomfield and Picton, because these areas were not financially supporting the service initially, the funding formula for the gas tax could not include these populations, thereby limiting the amount of funds received. As a result, consistent funding sources had to be found through grants and the development of partnerships that were mutually beneficial.

Another challenge in the initial stage of the program was that large used buses were purchased to run the one year pilot project. Consequently, there were high costs for repairs and fuel consumption, and the Town of Deseronto Council was led to consider the continuation of the program. Had it not been for a grant from the Parrott Foundation for the purchase of a new fuel-efficient vehicle, Council very likely would have opted to shut down the service because of the high costs associated with operating it.

In addition, public opinion is not always favourable to public transit given that there is a very car-centric attitude held by those who do not use the service. This attitude needs to be overcome for continued support at the municipal level as, while both municipal and public support for Deseronto Transit are favourable at present, this has not always been the case. About five years into the operation of the service, support from the general public was beginning to wane. Due to rising policing costs, wage equity legislation, costs associated with operating a regional transit service and a reduction in funds provided to all municipalities from the provincial government, taxes would need to be increased. Although the municipality viewed the service as valuable and needed by many residents, the costs and benefits were being questioned. It was around this time, in 2012, that news came of the huge increase to be received from the annual provincial gas tax allotment. This meant that the contribution made by the Town of Deseronto could decrease substantially and so Council was able to make the decision to commit to transit on an ongoing basis.

There are also many legislative requirements that come with operating and maintaining a public service, and it can be a challenge to keep up with these. For example, current operations accommodate riders with disabilities by allowing for door-to-door pickup, with the driver leaving the fixed route within reason. Most of the service area has other agencies already providing accessible transportation which then takes the onus off of Deseronto Transit to accommodate them. However, the recent Accessibility for Ontarians with Disabilities Act (AODA) still requires that the service comply with all legislation, and it is taking considerable time and resources to develop the necessary policies and procedures, and make the physical changes that need to be implemented. For instance, new requirements in 2017 will be that automated voice announcement technology be installed. This is very costly, and there is no way that it can be afforded using current resources (e.g., a recently received quote stated that it would cost \$100,000 for the software in the office and an additional \$30,000 per vehicle). Therefore, it is the intention of the service to apply for funds for assistance through the Ontario Trillium Foundation.

²⁹ This entire section is from the interview with Susan Stolarчук, Transit Administrator, Deseronto Transit, May 2, 2014.

Finally, while ridership continues to steadily increase in the current service areas (illustrating a definite need for public transportation), there remain significant gaps in service that cannot be addressed given present revenue streams. A common complaint stems from the limited amount of routes that can be offered. Not only have requests been made to expand the service to other areas (e.g., within Prince Edward County), but greater frequency of service is also desired on existing routes so as to meet various transportation needs (such as those going to medical appointments or returning from work in the middle of the day).

Impacts and Successes³⁰

Numerous studies and research have been, and are currently being, conducted on the 'value' of public transportation for communities. Most have stated that it is difficult to quantify just how many of the benefits to a community can be attributed to having public transit available. As a small transit operation, Deseronto Transit does not have the resources to pursue research specific to its area at this time.

However, as part of their funding agreement with the local United Way agency, Deseronto Transit participates in Outcome Measurement Reporting. This involves annually evaluating the service and reporting the resulting data to the United Way of Quinte. Data collected through the use of surveys has assisted the service in determining overall impact, planning route development and changes, and making other management decisions. For instance, a survey conducted in 2011 to assess the impact of the provision of Deseronto Transit has on ridership found the following (based on 47 responses):

- 94% - Improved access to vital services
- 89% - Improved quality of life
- 81% - Achieved more disposable income
- 11% - Obtained employment
- 23% - Remained employed

In addition, the Transit Administrator has received numerous messages from passengers telling her how the service has personally helped them to improve their quality of life. From these personal accounts, along with the evaluations for funders, it becomes clear that Deseronto Transit plays an instrumental role in providing access to education, employment supports (e.g., life skills, job search), employment itself, and basic needs (such as food and health care). By providing an affordable and flexible public transportation option for obtaining and maintaining long-term employment, Deseronto Transit in turn helps to reduce poverty for both individuals and families within the Bay of Quinte region.

As previously mentioned, the Transit Administrator and other members of the Transit Management Committee belong to and/or network with service agencies in the catchment areas, and the success of the program relies on them to provide information on service needs and gaps. While no research or studies have been performed by the transit service due to a lack of available human resources, Deseronto Transit has developed working relationships with social agencies concerned with the benefit of Aboriginal peoples, and the program serves the Aboriginal community within the Mohawk First Nation's Tyendinaga Territory.

Deseronto Transit is currently in a better financial position than it has ever been. Through repeated lobbying efforts by representatives for the service, the Town of Greater Napanee and Tyendinaga Township both agreed to support Deseronto Transit with annual commitments of \$1,000 (starting in 2011 and 2012 respectively). As a result, Deseronto Transit's provincial gas tax funding allocation will be \$156,000 in 2014. Most municipally owned and operated public transit organizations are funded by the municipality at a level of 55-60% of the annual operating budget. Yet, thanks to contributions from the other municipalities combined with the gas tax allocation, the Town of Deseronto is only required to provide a contribution of 9% of the service's total operating budget. This is considered to be a success story by both the Transit Management Committee and the Town Council itself.

³⁰ This entire section is from the interview with Susan Stolarчук, Transit Administrator, Deseronto Transit, May 2, 2014.

Other Community Support

Deseronto Transit has a number of key partnerships which contribute to its success. One of them is with Prince Edward, Lennox & Addington Social Services (PELASS) which commits to a set number of bus pass purchases per month, in return for a route that facilitates transportation for medical purposes. On an annual basis, PELASS purchases \$25,200 in bus passes providing guaranteed income for Deseronto Transit and saving the agency a significant amount in taxi fares.

Currently the Transit Administrator is also a participant in the Vital Signs Working Group operating out of Prince Edward County. This group is dedicated to closing transportation gaps in their community. Intra-city transit service is one of the initiatives being pursued as well as expanded and increased transit services. The Vital Signs Group will be developing a proposal to present to local municipalities outlining the need for increased transit service and their recommendations.³¹

Deseronto Transit is also a member of Hastings and Prince Edward Transportation Solutions, which is a 28-member committee with the mission of creating “an integrated, barrier-free transportation system that gets people where they need to go.” It is the vision of the committee to establish “a resident focused collaborative, integrated transportation system that provides an easily accessible information portal of all local transportation resources and effectively and efficiently moves people to services within and outside of Hastings and Prince Edward Counties.” Other members include: Kingston General Hospital, United Way of Quinte, the Community Cares for North, Central & South Hastings, Hastings Children’s Aid Society, Canadian Cancer Society, and The Rural Overland Utility Transit (TROUT).³²

E. Future Considerations

Long-term sustainability is the primary focus for Deseronto Transit at present. With the increased funds being received through the provincial gas tax program, they are now able to build a reserve account for the replacement of transit vehicles. The ability to do this is critical to the survival of the service, and it is hoped that enough money will be accumulated within the next year to replace an aging 11-passenger bus in 2015. Extra funds will not be spent on expansion of service until a healthy reserve account is established. Not only will this reserve account be used for the replacement of vehicles, but it is also required in case of any unforeseen shortages in the Budget.

Deseronto Transit is also looking to expand its partnerships in the future and, as explained above, is currently working with groups in Prince Edward County to look at ways to address transportation gaps within their community. In 2013 a survey was conducted to help determine where changes could be made to the transit service (within this catchment area) that would have a positive impact on riders. The results from 33 respondents showed that:

- 85% said there is a need for increased service
- 66% said a mid-morning departure is needed
- 69% said an intra-city service within Prince Edward County is desired.

The belief is that intra-city transit could be implemented within the County with very little increased cost.

As previously discussed, other future plans could include greater frequency of service at peak ridership time slots and an additional mid-morning departure, which would greatly benefit the aging and retired populations. However, any extensions to service would have to be financially supported by the municipalities affected and/or through other sources of revenue.

³¹ Interview with Susan Stolarchuk, Transit Administrator, Deseronto Transit, May 2, 2014.

³² Hastings and Prince Edward Transportation Solutions website: <http://www.hpetransportation.ca/>. Accessed March 27, 2014.

CASE STUDY #5

Dial a Ride

CITY OF KAWARTHA LAKES
RURAL ROUTE TRANSIT

Information for this case study was provided by
Enzo Ingrubelli, Public Works Transportation Supervisor, City of Kawartha Lakes



A. Overview of Transportation Initiative

The City of Kawartha Lakes Dial a Ride Rural Route Transit is a pilot bus service that connects Lindsay, Dunsford, Bobcaygeon, Fenelon Falls and Cameron. There are ten scheduled stops in two loops, one traveling clockwise and one traveling counter-clockwise. Each loop takes two hours to complete, with six loops in each direction. The service operates from 7:00 a.m. to 7:00 p.m. Fares are \$5.00, with children under five riding for free. The service is available to the general public, but the bus will also make stops along the route, within 150 meters of the route, to service registered customers. The service is operated by Mole Ground Transportation using three accessible buses with trained drivers.

B. Context

Geography

The City of Kawartha Lakes is located in Central Ontario, 90 minutes by car northeast of Toronto.¹ Formerly known as Victoria County, it is mostly rural, with over 250 lakes, wilderness, farmland and rivers. It is comprised of 17 communities linked by the Trent-Severn Waterway.² This national historic site, operated by Parks Canada, covers 386 kilometres, from the Bay of Quinte on Lake Ontario to

Georgian Bay, through a chain of rivers and lakes linked by over 40 locks and excavated canals. Five of the locks are located in Kawartha Lakes: at Bobcaygeon, Lindsay, Fenelon Falls, Rosedale and Kirkfield.³ Lindsay, with a population of 20,354 according to the 2011 census, is the major urban centre of Kawartha Lakes.

Political Structure

Victoria County and its 19 constituent municipalities were amalgamated into a single-tier municipality and named the City of Kawartha Lakes by provincial legislation in 2001.

Economy

Lindsay is the hub for business and commerce in the City of Kawartha Lakes. Industries in Kawartha Lakes include manufacturing, agriculture, tourism, retail, construction, as well as emerging technologies in geomatics, water management, medical supplies and agri-food services.⁴ Agriculture has traditionally been the dominant use of land and, along with agriculturally-related businesses, generates significant economic activity and employment.⁵ The Frost Campus of Sir Sandford Fleming College contains the highly regarded School of Environmental and Natural Resource Sciences.⁶

¹ City of Kawartha Lakes: www.explorekawarthalakes.com/en/welcome/aboutkawarthalakes.asp.

² City of Kawartha Lakes: www.explorekawarthalakes.com/en/welcome/ourcommunities.asp?hdnContent=.

³ City of Kawartha Lakes: www.explorekawarthalakes.com/en/experience/trentsevernwaterway.asp.

⁴ City of Kawartha Lakes Economic Development: www.advantagekawarthalakes.ca/en/ourUniqueAdvantage/communityprofile.asp?_mid_=19477.

⁵ City of Kawartha Lakes and the Greater Peterborough Area Agricultural Economic Impact and Development Study, 2006: www.advantagekawarthalakes.ca/en/aboutUs/resources/CoverandExecutiveSummaryLR.pdf.

⁶ City of Kawartha Lakes Economic Development: www.advantagekawarthalakes.ca/en/ouruniqueadvantage/communityprofile.asp?hdnContent=.



The tourism industry thrives in Kawartha Lakes due to the picturesque scenery and pristine wilderness. Visitors are attracted to the Trent-Severn lock stations, the 800-kilometre network of trails, the Theatre for Performing Arts and many other museums, historic sites and towns, agricultural fairs, seasonal festivals and art studio tours.⁷

Demographics

As of 2011, the population of the City of Kawartha Lakes was 73,214, 1.8% fewer than in 2006. It has an aging population, with a median age of 48.4, up from 42.1 in 2001, and 8% higher than the median ages in both Ontario and Canada.⁸ According to 2011 census data, the Aboriginal population constitutes 2.9% of the whole population, and 1.6% people reported that they were visible minorities.

The rest of the population is almost entirely of British and European ancestry.

Transportation

Kawartha Lakes is directly connected to three major highways: #7 Trans Canada, #35 Provincial and #115 Provincial. The City of Kawartha Lakes is easily accessible to other major transportation routes, including Highways 401, 404 and 407. The Kawartha Lakes Municipal Airport, located just outside of Lindsay, is a Transport Canada certified airport.⁹ CanAr Bus Lines offers service between Toronto and Haliburton with nine stops in the City of Kawartha Lakes.¹⁰ The closest rail station and port are in Oshawa, 75 kilometres from Lindsay.

⁷ City of Kawartha Lakes: www.explorekawarthalakes.com/en/welcome/aboutkawarthalakes.asp.

⁸ City of Kawartha Lakes Economic Development: www.advantagekawarthalakes.ca/en/locateexpand/demographicsstatistics.asp.

⁹ City of Kawartha Lakes Economic Development: www.advantagekawarthalakes.ca/en/locateexpand/transportationlogistics.asp.

¹⁰ Can-ar: www.can-arcoach.com/wp-content/uploads/2012/04/HaliburtonLine.pdf.

C. Background

Local Transportation Context

Within the City of Kawartha Lakes, only Lindsay has a public transportation system. People living in other parts of Kawartha Lakes have generally used their own vehicles for transportation. In Lindsay, the transit service includes Lindsay Mobility, nicknamed LIMO. It is a specialized, accessible service that has been operating for many years. It runs from 7:00 a.m. to 7:00 p.m. just as the regular transit service does, using small accessible buses. There are no other public transit services available in the rest of the City. There is an informal, cooperative relationship between Community Care, a health and community support agency with offices in four locations within Kawartha Lakes, and the municipal transit service. Community Care provides transportation services to its own clients, but LIMO provides transportation to most of their clients within Lindsay, and Community Care provides transportation for their clients who live outside of Lindsay or who cannot take the LIMO.

The issue of transportation arose as a primary concern for the City of Kawartha Lakes during focus groups, public consultations and community surveys undertaken for the March 2014 Poverty Reduction Strategy for the City of Kawartha Lakes and County of Haliburton. People cited public bus transportation as an important means of increasing the number of people with year-round employment. Service providers also identified the lack of affordable transportation as a barrier to employment, as well as to accessing social services and community engagement. In terms of child care, almost 50% of respondents to a survey undertaken for the poverty reduction strategy indicated that affordable transportation was necessary to access child care. It was also noted that transportation issues for individuals and families with low incomes were exacerbated for those living in rural areas.

Transportation was identified consistently in the context of getting to medical appointments or other health and social services, attending training and post-secondary education opportunities, looking for employment, accessing the Internet for job opportunities, getting to work, shopping for the best price at grocery stores, taking children to childcare and afterschool programs and participating in the social and recreation activities of community life. In rural communities, unique requirements for transportation – including traveling further distances for essential services, obtaining wood for heating one’s home, getting to the local landfill where garbage collection is not provided, or moving to less expensive or better maintained housing – create additional challenges and make access to transportation especially vital to reducing poverty.¹¹

Furthermore, the “Background and Resources” document that accompanied the Poverty Reduction Strategy stated that:

The ability of all residents to access services and to participate in economic and social life is dependent on the availability and quality of local transportation services and options. Access to reliable, affordable and alternative means of transportation, including public transportation, enhances the livelihood, economic stability and quality of life of all residents. The ability to participate and be actively engaged in activities are key elements of healthy and inclusive communities, making transportation an absolutely vital component.¹²

¹¹ Poverty Reduction Strategy for the City of Kawartha Lakes and County of Haliburton: Transportation Action Plan: Background and Resources; March 2014, p. 3: www.city.kawarthalakes.on.ca/residents/house-and-home/transportation-prs-background-march-2014.pdf.

¹² Ibid., p.4.

Initiative Background

Since amalgamation, efforts have been made to find ways to connect the communities within the City of Kawartha Lakes. A fixed-route rural transit program was tested in 2011 but failed for several reasons.¹³ The current Dial a Ride program was initiated in June 2013, recommended by the Transportation Advisory Committee. It combines a conventional fixed route service with a small amount of door-to-door service. There were no studies conducted prior to implementation as it was felt that the best study would be to launch a pilot program and assess the results. The City of Kawartha Lakes contracted with Mole Ground Transportation (MGT) to provide the bus service. At the time it was initiated, Councillor Gord James said, "It's a way to connect our communities, help with economic development and shopping experiences in different communities."

D. Current Operations

Schedule, Routes and Fares

The Dial a Ride program integrates features of conventional bus service with an accessible door-to-door service. Two accessible buses travel around Lake Sturgeon on a fixed two-hour route, connecting Lindsay, Dunsford, Bobcaygeon, Fenelon Falls and Cameron. Mole Ground Transportation owns the buses and employs the drivers. MGT uses three modern, easily accessible buses to carry out this service, with two on the road at a time. All buses meet the standards of the Accessibility for Ontarians with Disabilities Act (AODA) and have two securement spots for wheelchairs. As noted above, there are 10 scheduled stops in two loops, one travelling clockwise and one travelling counter-clockwise. The clockwise route starts at the Lindsay Transit Hub at 7:00 a.m. and ends at the same location at 7:00 p.m. The counter-clockwise route has the

same stops, but in reverse order. There are three stops in Lindsay, one in Cameron, two in Fenelon Falls, three in Bobcaygeon and one in Dunsford. The bus will also make stops along the route, within 150 metres of the route, to registered customers.¹⁴

Ridership

The conventional bus service provided by Dial a Ride is not limited to seniors or persons with disabilities. Anyone can take the bus; even people that own cars take the bus because it is cheaper. Ridership is mixed in terms of age and purpose of trip. The more common reasons that people take the bus are to get to appointments, to go shopping and to visit friends and families. Some riders simply enjoy getting out of the house to take a scenic drive around Lake Sturgeon.

The specialized bus that provides door-to-door service is available to individuals who are not able to get to a stop due to limitations. Those that require the specialized service are required to register with the City and complete an application form.

Ridership is steadily increasing. In May, 2014 the buses transported 929 riders, an 80% increase from the 508 riders in Jan, 2014.

¹³ Metrolandmedia - MyKawartha.com: www.mykawartha.com/news-story/3858074-dial-a-ride-offers-more-flexibility-for-rural-transit-users.

¹⁴ City of Kawartha Lakes: www.city.kawarthalakes.on.ca/news/new-provider-for-dial-a-ride-service.

Organizational Structure

The City of Kawartha Lakes operates the Dial a Ride Rural Transit pilot program. It contracts with MGT to provide the buses and drivers, but inquiries and bookings are managed by the Public Works Transportation Supervisor, who is employed by the City of Kawartha Lakes.

Operating Costs and Revenues

Apart from fares, the program is funded completely by the provincial gas tax program, as one component of the transportation services provided by the City of Kawartha Lakes for which gas tax funds are received.

E. Future Plans

Following a review of the program by City Council on June 24, 2014, the Dial a Ride Rural Route Transit system has been extended to June 2015. There are no plans at present to expand the program, but it may be considered in the future.

CASE STUDY #6

EasyRide

PERTH AND HURON COUNTIES

Information for this case study was provided by
Melanie Higgins, Transportation Supervisor & EasyRide Lead Transportation Coordinator,
ONE CARE Home and Community Support Services



A. Overview of Transportation Initiative

EasyRide is a collaborative, rural transportation service shared by five community support agencies across Huron and Perth Counties. As a group of agencies sharing a common interest in improving community based transportation services, the group submitted a proposal and was awarded a project grant through the South West LHIN's Aging at Home Strategy in 2008/09, which resulted in the creation of EasyRide. The program relies on a central dispatch coordination system that leverages the fleet resources of the partner agencies to provide "frequent and flexible door-to-door service."

Transportation is available for registered clients who are seniors as well as for clients who

- are without access to transportation or are where public transportation is not available,
- have physical or cognitive limitations,
- require specialized transit (e.g., wheelchair access), or
- do not have family and friends who are able to help out.¹

B. Context

Location

The Counties of Perth and Huron are located in southwestern Ontario, north of the City of London and west of Kitchener. They are adjacent to each other.

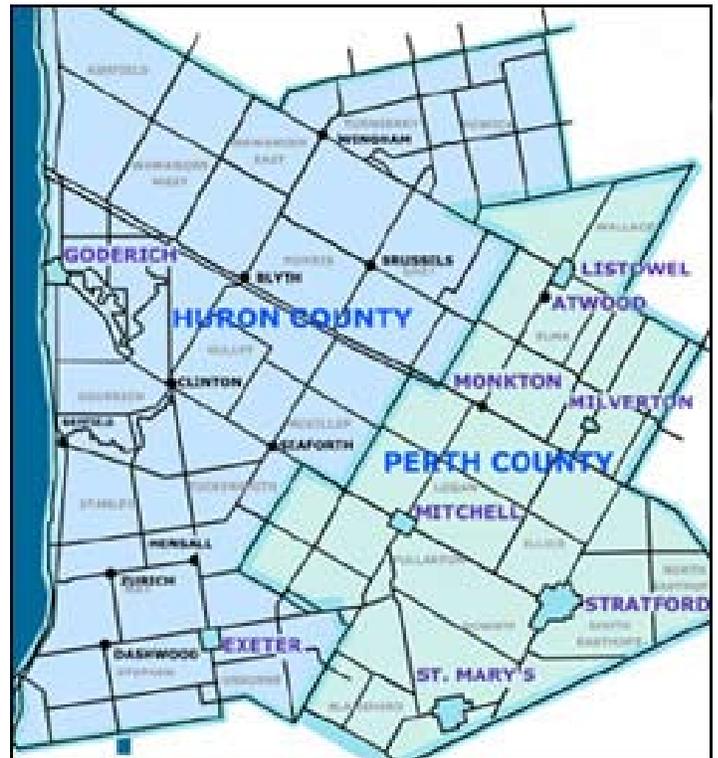
Demographics/Density

The two counties cover a large geographic area of approximately 5,600 square kilometres. Perth County covers about 2,200 square kilometres and is approximately 50% rural. Urban populations are found in the small towns of Listowel, Mitchell and Milverton. The City of Stratford and the Town of St. Marys, while located within Perth County, are separate municipalities.²

Huron County covers about 3,400 square kilometres and is more than 60% rural, with small urban populations in Clinton, Goderich, Wingham, Exeter and Seaforth.

Huron County is considered one of the most rural counties in Ontario with an overall population density of 18 people per square kilometre, while Perth's population density is considerably higher at 34 people per square kilometre.

The average age in Perth County is 39.3 years, which is just slightly higher than the Ontario median age of 39 years.



¹ Info Huron County website: <http://centraleastontario.cioc.ca/record/PER2130?UseCICVw=18>; accessed April 14, 2014.

² Lynn Bowering Consulting, *The Road Ahead: A Study of Transportation Needs across Huron and Perth Counties*, The Social Research & Planning Council 2012.



However, in Huron County, the median age is 42.3 years. The percentage of seniors (over the age of 64 years) in both counties is higher than in the province as a whole (19% in Huron, 16% in Perth and 13% for Ontario). A high ratio of dependent family members is expected as a result of an aging population. Changing family composition may result in additional pressures for drivers.

Both counties are relatively homogenous in terms of ethnocultural diversity compared to the province as a whole, with the notable exception of the small Anabaptist populations. The most common languages, apart from English and French, are German and Dutch, which are spoken by approximately 10% of the population.

Median family income in 2005 was \$62,446 in Huron County and \$68,713 in Perth County. Both of these figures are below the Ontario median family income of \$69,156. Social and health problems that may accompany poverty can be compounded by a lack of transportation as it restricts access to services.

Political and Governance Structures

The County of Huron is a municipal corporation known as an upper-tier municipality. Within the county, there are nine lower-tier municipalities:

1. Corporation of the Township of Ashfield-Colborne-Wawanosh (Formerly Ashfield, Colborne and West Wawanosh Townships)
2. Corporation of the Municipality of Bluewater (Formerly Hay and Stanley Townships, plus the Villages of Bayfield, Hensall and Zurich)

3. Corporation of the Municipality of Central Huron (Formerly Goderich and Hullett Townships, and the Town of Clinton)
4. Corporation of the Town of Goderich
5. Township of Howick
6. Corporation of the Municipality of Huron East (Formerly Grey, McKillop and Tuckersmith Townships, Village of Brussels, and Town of Seaforth)
7. Corporation of the Municipality of Morris-Turnberry (Formerly Morris and Turnberry Townships)
8. Corporation of the Township of North Huron (Formerly Village of Blyth, Township of East Wawanosh, and Town of Wingham)
9. Corporation of the Municipality of South Huron (Formerly Stephen and Usborne Townships and Town of Exeter)

Within Perth County, there are four member municipalities and two separate municipalities:

1. Municipality of North Perth
 2. Township of Perth East
 3. Township of Perth South
 4. Municipality of West Perth
1. Town of St. Marys
 2. City of Stratford

Major Industries

Huron County has three key economic pillars: agriculture, manufacturing and tourism. Historically, agriculture has been the mainstay of the local economy. However, Huron County's manufacturing sector has grown significantly over the past decade, and it has eclipsed agriculture as the lead revenue generator for the county. Tourism is the third major pillar of the local economy and is fueled by numerous tourist attractions as well as local events such as the Goderich Celtic Festival and the Blyth Threshers.³

In Perth, the five consistent industries are:

1. Agriculture, forestry, fishing and hunting
2. Manufacturing
3. Arts, entertainment and recreation
4. Wholesale trade
5. Construction.

C. Background

Local Transportation Context

Like many, if not most, rural areas of the province, transportation in Huron and Perth Counties is a long-standing issue. In Huron County (including lower tier municipalities), there has been no public transit service. Prior to the formation of One Care in 2011 through the amalgamation of Town & Country Support Services, Midwestern Adult Day Services and Stratford Meals on Wheels & Neighbourly Services, Town & Country Support Services and Midwestern Adult Day Services both had their own transportation programs for seniors and adults with disabilities operating in Huron County. Additionally, Lambton Elderly Outreach (LEO) provided transportation services to seniors and adults with disabilities in Sarnia and Lambton as well as limited services for Midwestern Adult Day Centre's⁴ Grand Bend site; however, most



of LEO's services have been for seniors and adults with disabilities in Sarnia and Lambton County.⁵

According to Dillon Consulting, another not-for-profit provider called Huron Bruce Transit, out of Wingham, was created to service North Huron and South Bruce.

The organization had received financial support from the Municipality of Morris-Turnberry and therefore qualified for additional provincial support through the gas tax fund. However, the program ceased in May of 2010 and was not replaced by any other service.⁶

The City of Stratford is the only community offering public transit within the two counties.

The demographic profile of the counties indicates a higher than provincial average of seniors and youth while, at the same time, family incomes are below the provincial average. Dillon Consulting conclude that there are five groups with "the most acute transportation needs":

1. People on low incomes
2. People with disabilities
3. Youth
4. Women
5. Seniors⁷

³ Huron County Economic Development website: <http://www.huroncounty.ca/econdev/>; accessed March 23, 2014.

⁴ Midwestern ADC was one of the agencies that amalgamated to become ONE CARE. LEO continues to provide transportation to One Care's Grand Bend site.

⁵ Dillon Consulting Limited, Assessment of Community Transportation Service Expansion in Huron County, Final Report. October 2010.

^{6,7} Ibid.

Initiative Background

In June 2009, seven community support agencies in Huron and Perth initiated the idea of developing a coordinated booking service that would provide people with one number to call to access transportation services. Funding for this booking system was provided by the South West LHIN through their Aging at Home Strategy. Through the funding program, EasyRide partner agencies also received three Dodge Grand Caravans; however, they were not wheelchair-accessible, so they could not be used to replace vehicles in the fleet. Out of more than 30 projects vying for funding, the initiative – initially called Rural Transportation across Huron Perth – was rated the number one project.

The seven agencies initially involved were:

1. Stratford Meals on Wheels and Neighbourly Services
2. Midwestern Adult Day Services
3. Town and Country Support Services – Huron County
4. Community Outreach & Perth East Transportation
5. Mitchell & Area Community Outreach & Mobility Bus
6. St. Marys & Area Home Support Services
7. VON Perth-Huron.

Although the agencies already had their own transportation services that they were providing to their respective clients, they recognized that coming together could allow them to more efficiently and effectively address the following needs:

- providing easier access to transportation for clients, hospitals, CCACs, long-term care homes, etc.
- providing affordable and accessible transportation for clients throughout Huron Perth and beyond
- increasing efficiencies by having access to more vehicles, drivers and volunteers
- providing clients with access to specialized transportation services within and outside of Huron & Perth counties for health services such as medical appointments, dialysis, treatments etc.

With funding from the LHIN now available, the organizations contracted with a consultant to research four partnership transportation delivery models that would best fit their needs. Of the four models presented, the one that seemed most appropriate for the agencies was a centralized, coordinated dispatch system.

As part of the planning process, the partners developed a vision and set of goals for the initiative. The vision includes “creating a ‘system’ for community support transportation through central coordination of trips using web-based scheduling software; having one number to call to access service; providing centralized intake, scheduling and dispatch; and standardized policies and procedures.”⁸

Additionally, the goals laid out for the project included the following:

- improve access to Community Support Service transportation
- expand and enhance existing transportation services
- reduce duplication of service
- reduce confusion on the part of clients or other agencies over whom to call
- increase the potential for efficiency
- agencies retain ownership of agency vehicles.⁹

Given that funding was through the Aging at Home Strategy, it is not surprising that the program was designed largely to focus on improving the health of seniors and older adults who were dealing with one or more of the following:

- living with complex needs
- living with, or at risk of developing, a chronic disease
- living with mental health and addictions challenges.

⁸ EasyRide Door-to-Door Service, Niagara Connects PowerPoint Presentation. April 2013.

⁹ Ibid.

Initial funding for the EasyRide project (2008/09) included base funding of \$109,000 and a one-time investment of \$137,000 which was used to hire Dillon Consulting and set up the central office.

The program funding increased in 2009/10 to \$228,224 and \$238,000 in 2010/11. According to Melanie Higgins, EasyRide Lead Transportation Coordinator, funding has stayed constant over the past several years.¹⁰

D. Current Operations

In 2011, Stratford Meals on Wheels & Neighbourly Services, Midwestern Adult Day Services and Town & Country Support amalgamated to form One Care Home & Community Support Services.

One Care is the lead agency for the initiative and assumes responsibility of the central dispatch service. Using the Trapeze Novus Transportation Management System software, the central office provides a single point of contact for people needing the service.

The software package allows web-based scheduling that can be viewed by all of the agencies, and the central office in Stratford has access to all of the agencies' vehicle information allowing EasyRide staff the opportunity to book whichever vehicles make most sense given clients' locations and transportation/ accessibility needs.

Demographic description of ridership, members and/or participants:

Clients using the service must:

1. have completed the intake process with one of the member agencies and be registered with EasyRide
2. be a senior or an adult who has physical or cognitive limitations
3. require specialized transit
4. be without access to transportation
5. not have family and/or friends who can assist



Client user data reveals that the profiles of the types of trips required include approximately one third for health related appointments such as specialist appointments, treatments, dialysis, discharges or admissions to/from hospitals, long term care facilities and retirement homes. Another third provides transportation for adult day programs and the remaining third of trips are for shopping, employment and social purposes.

Schedules and Fares

The central dispatch office is open for taking bookings between 8:30 am and 4:00 pm, Monday to Friday, although the trips may actually happen outside of the office booking hours. Bookings can be made for one-time or regular trips, and same-day bookings will be accommodated if possible (depending on driver and vehicle availability). The service provided is door-to-door; and EasyRide can arrange for escorts or attendants through partner agencies to assist clients if needed.

The fares vary according to the service provider and the location; however, flat fees do apply for in-town trips and per-kilometre fees for out-of-town trips. Clients are responsible for all transportation costs, including parking if needed.

¹⁰ Telephone interview, April 8, 2014.

¹¹ EasyRide Door-to-Door Service, Niagara Connects PowerPoint Presentation. April 2013.

In-town fares:

- \$3.50-\$5.50 per in-town volunteer trip
- \$3.75-\$10.00 per in-town accessible trip.

Long-distance fare ranges:

- \$0.37-\$0.46/km for out-of-town volunteer trips
- \$0.40-\$0.80/km plus wait time for accessible trips.

Resources available

Collectively, EasyRide resources across the different agencies include 24 agency-owned or -operated vehicles, including:

- eight wheelchair-accessible buses
- eight full-size wheelchair-accessible buses
- five wheelchair-accessible low-floor minivans
- three seven-passenger minivans.

There are also 34 paid staff drivers and more than 200 volunteer drivers.

**Organizational Structure**

Because each EasyRide partner agency was already providing transportation services to its own clients prior to the formation of EasyRide, no new delivery model was created. The structure for EasyRide is based on a collaborative model, and each agency has its own unique clients, governance, transportation resources and funders.

Funding for the EasyRide program is provided through the South West LHIN. It is no longer provided through the Aging at Home Strategy program, but, instead, is part of the operational funding for One Care. Additional funding for transportation staff time is also provided by One Care.

For the individual agencies providing the actual driving services, funding arrangements are unique. However, the majority of funding is provided through municipal and provincial gas tax dollars, the South West LHIN and the United Way of Perth-Huron, as well as other contributors.

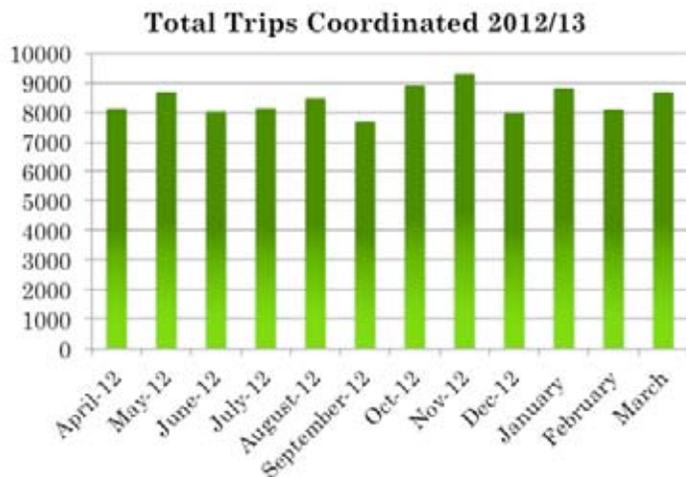
Impacts

Continued annual growth since 2008 point to a successful program. In 2012/13, more than 4,000 clients were served, and more than 100,000 trips were coordinated, with an average of 8,300 coordinated trips per month.¹²

Program staff have also identified the key successes of EasyRide:

- a standardized intake process
- efficient scheduling and dispatch
- standardized policies and procedures
- a marketing and public awareness campaign
- service provision to hospitals and the Community Care Access Centre

¹² Niagara Connects PowerPoint Presentation. April 2013.



Not only has it become a model of collaborative transportation services in Huron and Perth Counties, but representatives from the program are regularly asked to share their story for other programs throughout Ontario considering a similar model.

Stakeholders involved with the program have identified a number of lessons learned. One key lesson relates to having a greater time for planning to work through elements of the partnership model early on in the process. This would allow all agencies to know what is required and what is expected ahead of time.

EasyRide has improved access to community support service transportation and allowed for expanded and enhanced transportation services throughout the geography. Clients have experienced a reduction in confusion over who to call for their transportation needs and are able to access affordable and accessible transportation. When required, EasyRide connects clients to alternate funding sources and further subsidy programs to ensure that transportation costs are manageable for all users.

Keeping up with changing software and licensing costs and changing communication technology continues to be a challenge for EasyRide. Stakeholders continue to experience pressures related to static funding levels, increasing demand, increasing operational costs, fleet management and vehicle replacement as well as a lack of alternative transportation options for this geography.

Affordability is an ongoing challenge. Transportation is expensive to operate and it has fallen onto community support service agencies, especially in rural areas. Affordability is a cornerstone of accessibility, especially for the population served by EasyRide. EasyRide continues to seek opportunities to address affordability through new funding streams and cross-sector collaborative opportunities.

E. Future Plans

In future, one of the goals of the EasyRide partnership is a standardized fare structure, which must be phased in gradually to allow agencies to keep services affordable and to maintain ridership.

Additionally, EasyRide is one of the organizations involved with the Huron Perth Transportation Task Force, a larger network of organizations in the two counties led by the United Way Perth-Huron. With funding from the Ontario Trillium Foundation, the Task Force is currently researching transportation needs in the two-county area, and the “results will be used to inform recommendations for improved service provision/collaboration and new service adoption throughout Perth and Huron.”¹³

Rural transportation continues to present unique challenges and opportunities for EasyRide. They continue to play an active role in identifying emerging collaborative models and investigating creative funding opportunities for a cross-sector transportation solution for Huron & Perth Counties.

¹³ “United Way Perth-Huron Releases Transportation Survey”. Media release, United Way Perth-Huron, November 15, 2013: <http://perthhuron.unitedway.ca/wp-content/uploads/2013/11/Transportation-Task-Force-Media-Release-November-2013.pdf>. Accessed April 14, 2014.

CASE STUDY #7

Lanark Transportation Association

Information for this case study was provided by
Marilyn Bird, Executive Director

A. Overview of Transportation Initiative

The Lanark Transportation Association (LTA) is a not-for-profit organization that has been providing community-based transportation to residents of Lanark County and the Town of Smiths Falls since 2001. LTA is served by a team of eleven paid drivers (with a couple of volunteer drivers available for overflow), as well as one part-time and three full-time staff providing administrative support. It is governed by a volunteer Board of Directors, which includes representation from Lanark County.

Lanark Transportation Association provides transportation services for eligible residents to attend medical appointments, educational and training activities, agency-sponsored day programs, and other specialized services. They serve a base of over 5000 riders including seniors, children, people with disabilities, low-income families and clients of agencies. The service has thirteen vehicles on the road, four of which are wheelchair-accessible. Fares are based on approximately \$0.65 per kilometre and the cost of trips is subsidized to ensure greater affordability. LTA provided over 15,000 trips in 2013, covering more than 507,000 kilometres.

B. Community Profile

Location

Lanark County is located in south-eastern Ontario, about 50 kilometres or half an hour southwest of Ottawa and 100 kilometres or one hour northeast of Kingston. The towns of Perth, Smiths Falls and Carleton Place are main settlement areas within the county's boundaries. The area covers approximately 3,034 square kilometres and is home to over 100 lakes, rivers and waterfalls, including part of the Rideau Canal System. The landscape is varied, from the rocky Canadian Shield in the northern part of the county to the limestone plains, sand and clay of the Great Lakes Basin in the south.¹



Demographics/Density

The population of Lanark County in 2011 was 65,667, with a density of 21.6/km². Given all of the lakes, rivers and trails, the area is also a destination for outdoor enthusiasts. The population therefore increases substantially during the summer months with the arrival of seasonal residents and cottagers.²

Political and Governance Structures

The County of Lanark is an upper-tier level of government comprised of eight lower-tier municipalities, which include Beckwith Township, Town of Carleton Place, Drummond/North Elmsley Township, Lanark Highlands Township, Town of Mississippi Mills, Montague Township, Town of Perth, and Tay Valley Township. The Town of Smiths Falls is physically within the boundaries of the county as well, but it is a separated municipality and is therefore not under the jurisdiction and administration of the Lanark County government.³

¹ Wikipedia: The free encyclopedia: http://en.wikipedia.org/wiki/Lanark_County. Accessed: June 6, 2014; and Lanark County website: <http://www.lanarkcounty.ca/>. Accessed May 29, 2014.

² Statistics Canada, Census 2011

³ Wikipedia: The free encyclopedia: http://en.wikipedia.org/wiki/Lanark_County. Accessed: June 6, 2014.

Economy

The logging industry stimulated economic development in the area during the 19th century, so lumber mills flourished throughout the region, along with textile mills. Today, many of those mills have become transformed into condominiums, high-tech offices, restaurants, retail boutiques and specialty shops such as craft and antique galleries. As a result, several quaint villages with limestone buildings and bridges are combined with local waterways and parks, offering tourism and recreation and an important source of economic stimulus. In addition to farmers' markets and flea markets, a couple of well-known annual summer festivals are held in the area, such as Perth's World Record Kilt Run and the Mississippi Mills International Puppet Festival. Lanark County has also been described as "The Maple Syrup Capital of Ontario", as it is one of the top maple syrup producing centres in the province.⁴

Local Transportation Context

Daily commerce and various health and social services can be accessed within the different towns, villages and hamlets of Lanark County. The City of Ottawa is also a major destination for many goods and services that are not provided locally, including those services offered at large regional hospitals. Many residents, particularly in the northeastern part of the County, also commute to Ottawa for employment, as Lanark County provides a good quality of life within a reasonable drive of the nation's capital.⁵

There are currently a couple of bus companies that provide daily commuter service to Ottawa, with route and schedule information offered through the OC Transpo "Rural Partner Services" webpage. Greyhound Canada and VIA Rail also provide bus and train services for out-of-county excursions to Ottawa and Kingston. Car and truck rentals are available, as well as carpooling options. In addition, several taxi services operate within Lanark County.

Yet, the county is a largely rural area and so access to transportation is a greater issue for those living outside of the towns and villages, particularly for those who do not or cannot drive or do not have access to a vehicle. Community Home Support for Lanark County has a transportation program for out-of-town medical appointments and can provide escorts for those who qualify. The Canadian Cancer Society also offers transportation to local residents attending cancer treatments. In addition to these options, Lanark Transportation Association provides transportation services to those who need them.⁶

C. Background

Background of Current Initiative

In the late 1990s, rural transportation was being addressed across the province via community-based regional work groups. It was determined, through a grant from the Ontario Trillium Foundation, that a lack of transportation was a quality-of-life issue. In 1996, the Valley Heartland Community Development Corporation sponsored the Lanark County/Smiths Falls Community Transportation Group to examine rural transportation issues in the area. Then, in 1998, the Lanark, Leeds & Grenville Community Transportation Project was established. Many of the early members of this group played a role in the eventual creation of a Lanark County community transportation service. There was initial representation from Lanark Community Programs, Access Taxi, the Canadian Cancer Society, Lanark County and local municipalities.⁷

In 1999, the Lanark County Transportation Planning Committee came into being. A six-month pilot project, called the Lanark County Transportation Project, was established and sponsored by the Volunteer Bureau of Lanark County, under the supervision of the Transportation Advisory Committee (TAC). This pilot project was mainly funded by the United Way of Lanark County and the National Child Benefit Fund, with in-kind support

⁴ Wikipedia: The free encyclopedia: http://en.wikipedia.org/wiki/Lanark_County. Accessed May 29, 2014.

⁵ Wikipedia: The free encyclopedia: http://en.wikipedia.org/wiki/Mississippi_Mills,_Ontario. Accessed June 6, 2014.

⁶ South East Health Line website: <http://www.southeasthealthline.ca>. Accessed June 7, 2014

⁷ Interview with Marilyn Bird, Executive Director, Lanark Transportation Association, on June 4, 2014.

from Lanark Community Programs (vehicles), Emergency Health Services (computers), and Access Taxi (office space).⁸

The pilot project concluded in June of 2000 and, after a summer recess, further funding from the Ontario Trillium Foundation allowed the service to continue, along with \$15,000 in emergency funding from Lanark County. At this time, the name was changed to Lanark County Transportation. Sustainable funding remained a priority through 2001 and, with incorporation, the name of the service was once again changed to its current name, Lanark Transportation Association (LTA).⁹

Initial Funding Sources and Local Support

Since 2001, ongoing funding and support has been received from Lanark County. Until 2010, annual contributions ranged from \$40,000 to over \$80,000, with a consistent contribution of \$76,000 for the years 2005, 2006 and 2007. Lanark County Council made their financial support for LTA a regular line item in 2005. This was the same time that the provincial gas tax fund became available, and local government contributions to a transportation service were a requirement for receiving the funds. Considering that LTA was the only organization providing accessible transportation at the time, it was an easy decision for Council to support them. The LTA has received gas tax funds ever since.¹¹

In 2005, the Town of Smiths Falls also provided \$10,000, and additional grants were received from the Ontario Trillium Foundation for the purchase of vehicles. A substantial amount of revenue came from fares as well, from \$28,054 in 2003 up to \$261,200 in 2008.

Given that Smiths Falls is a separate municipality and not a part of the governance and financial structures of Lanark County, LTA staff began to track and report to the Town of Smiths Falls Council on the number of riders originating in the town. For example, it was found in 2009 that 3,596 trips originated within the Town of Smiths Falls (approximately 30% of overall ridership), and in 2010 6,218 trips originated from there (approximately 44% of ridership). Given the high percentage of riders, representatives from Lanark County worked with LTA staff to persuade the Town of Smiths Falls to consider making regular financial contributions to the service. In 2011, the Town of Smiths Falls began providing consistent contributions to LTA (i.e., \$8,500 in both 2011 and 2012).¹²

D. Current Operations

Organizational Structure

Lanark Transportation Association is a not-for-profit organization that provides community-based transportation to residents of Lanark County and the Town of Smiths Falls. LTA is governed by a volunteer Board of Directors, who is responsible for overall operations. Over the years, board members have included people with a wide variety of backgrounds and occupations, including banking, law, municipal governance, social services and community development.¹³

Lanark Transportation Association is also served by a team of eleven paid and two volunteer drivers. The paid drivers receive approximately \$14-16 per hour, are registered employees with the organization and covered by program benefits. The volunteer drivers are only used for overflow and/or if the paid drivers are not available.

⁸ Marilyn Bird, Executive Director's Report, Lanark Transportation Association Annual General Meeting, 2009.

⁹ Ibid.

¹⁰ Marilyn Bird presentation to Smiths Falls Council. Town of Smiths Falls Council Minutes, March 10, 2014; and Interview with Marilyn Bird, Executive Director, Lanark Transportation Association, on June 4, 2014.

¹¹ Marilyn Bird presentation to Smiths Falls Council. Town of Smiths Falls Council Minutes, March 10, 2014.

¹² Interview with Marilyn Bird, Executive Director, Lanark Transportation Association, on June 4, 2014; and Marilyn Bird presentation to Town of Smiths Falls Council. Smiths Falls Council Minutes, March 10, 2014.

¹³ Marilyn Bird presentation to Smiths Falls Council. Town of Smiths Falls Council Minutes, March 10, 2014.

All of the drivers have the same training, which is offered once a year (defensive driving, first aid, etc.).¹⁴

Dispatch and administrative support is provided by the office staff, which is made up of one part-time and two full-time employees, as well as an Executive Director who oversees day-to-day operations.¹⁵ LTA has thirteen vehicles, four of which are wheelchair accessible. The organization owns and operates their own vehicles, as they feel that this is very important to both risk management and quality of service.¹⁶

Routes and Ridership

Lanark Transportation Association does not operate a fixed route. Rather, they pick clients up at their homes, take them to where they need to go, wait for them to conduct their business and then return them home again.¹⁷ Transportation is available primarily for medical appointments, agency-sponsored day programs and other specialized services. LTA also provides non-emergency, non-ambulance, inter-facility medical transfers. This sort of transportation is offered between long-term care facilities and hospitals for appointments, treatments and discharge. In 2012, LTA vehicles travelled over 500,000 kilometres and made 15,000 trips.¹⁸

Lanark Transportation Association charges a fee for service operation, coupled with subsidies for people with low incomes and others in need. LTA currently provides transportation to over 5000 eligible residents, with new clients coming on frequently. Passengers include seniors, children, people with disabilities, low-income families and

clients of various agencies. Eligible referrals come from a wide range of agencies, including the Ontario Disability Support Program (ODSP), Ontario Works (OW), child & youth agencies, Lanark Community Programs, Adult Protective Services, seniors' residences, the Children's Aid Society and the local women's shelter.¹⁹

The majority of Lanark Transportation Association's riders are registered with OW and ODSP, as both programs contain provisions to pay for medical transportation. Once a client has been approved to use LTA by their agency, LTA invoices and is paid directly by the agency on the rider's behalf. Clients may also be eligible if they are unable to access other transportation because of physical or financial limitations. Eligibility is determined in advance through the completion of a form to demonstrate financial need.²⁰

In 2013, LTA transported 13,562 passengers. As demonstrated in Figure 1, most passengers originated in the towns of Smiths Falls, Perth and Carleton Place.²¹

¹⁴ Interview with Marilyn Bird, Executive Director, Lanark Transportation Association, on June 4, 2014.

¹⁵ Ibid.

¹⁶ OHCC Environmental Scan Survey of Rural Transportation Initiatives in Ontario. Conducted: December 2013.

¹⁷ Ibid.

¹⁸ Marilyn Bird presentation to Smiths Falls Council. Town of Smiths Falls Council Minutes, March 10, 2014.

¹⁹ Interview with Marilyn Bird, Executive Director, Lanark Transportation Association, on June 4, 2014.

²⁰ Interview with Marilyn Bird, Executive Director, Lanark Transportation Association, on June 4, 2014; and South East Health Line website: <http://www.southeasthealthline.ca/displayService.aspx?id=72697>. Accessed June 7, 2014.

²¹ Marilyn Bird presentation to Smiths Falls Council. Town of Smiths Falls Council Minutes, March 10, 2014.

Figure 1: Passengers Transported by LTA in 2013

2013 Passenger Totals Originating From:

Beckwith Township	234
Carleton Place	2008
Drummond/North Elmsley Township.	632
Lanark Highlands Township.	1020
Mississippi Mills	760
Montague Township	90
Perth	3110
Town of Smiths Falls	4334
Tay Valley Township	1314
Other	60
Total.	13562

Schedules and Fares

The Lanark Transportation Association service operates from Monday to Friday, 6:00 a.m. to 6:00 p.m. Trips may take place outside of these hours or on the weekend, based on driver availability. Clients are requested to call one to two weeks in advance for scheduling purposes, however, efforts are made to accommodate short notice and even same day requests. In some cases, clients going to the same destination or travelling for similar purposes will be requested to share rides.²²

The cost of the trips is subsidized to ensure affordability, and fares are currently based on approximately \$0.65 per kilometre.²³ Fares can range from \$30 for an in-town run to \$120 for a return trip from Perth to Ottawa. Fares

include a round-trip and one hour of wait time.²⁴ There is financial assistance available for those who need it, but some form of fare needs to be provided by the rider. The amount that a rider pays is determined in advance at the time of booking and at the discretion of the rider (i.e., they state what they feel they can afford to pay).²⁵

Operating Costs and Revenues

The funding provided by Lanark County, the Town of Smiths Falls and the provincial gas tax is integral to Lanark Transportation Association being able to keep their prices affordable. In 2012, approximately 67% of LTA’s revenue was received through fare recovery (which includes direct fares from passengers and fares paid by agencies), 20.8% from the provincial Gas Tax, 11% through the County of Lanark, and 1.2% from the Town of Smiths Falls.²⁶

LTA receives an annual special grant from Lanark County (\$76,800 in 2013) with an additional contribution from the Town of Smiths Falls (\$8,000 in 2013). Due to these contributions, LTA is further qualified to receive money from the provincial gas tax fund, which Lanark County accepts the gas tax money on LTA’s behalf. As with other municipalities, the amount of money from the gas tax fund depends on the population of the area served, the number of kilometres covered and the number of passengers transported. As a result, in 2013, LTA received \$374,000 from the provincial gas tax fund.²⁷

Operations are demand-driven and based on need; annual budgets and expenses are therefore difficult to determine and vary from year to year. In 2012, employee wages and benefits were over \$375,000; fuel was approximately \$56,000; vehicle repairs and maintenance were nearly \$35,000; and insurance was approximately \$26,000.²⁸

²² South East Health Line website: <http://www.southeasthealthline.ca/displayService.aspx?id=72697>. Accessed June 7, 2014.

²³ Interview with Marilyn Bird, Executive Director, Lanark Transportation Association, on June 4, 2014.

²⁴ OHCC Environmental Scan Survey of Rural Transportation Initiatives in Ontario. Conducted: December 2013.

²⁵ Interview with Marilyn Bird, Executive Director, Lanark Transportation Association, on June 4, 2014.

²⁶ Marilyn Bird presentation to Smiths Falls Council. Town of Smiths Falls Council Minutes, March 10, 2014.

²⁷ Interview with Marilyn Bird, Executive Director, Lanark Transportation Association, on June 4, 2014.

²⁸ Lanark Transportation Association, Financial Statements, December 31, 2012.

Challenges ²⁹

Providing transportation is expensive, and in the first few years of LTA's existence, the most challenging issue was obtaining enough funding to operate. Due to the low number of rides provided at the beginning, fares only covered approximately half of the cost of operations. Thankfully, significant growth over the years has now put LTA in a relatively stable funding situation. However, this could certainly change.

For instance, the money that they currently receive from the provincial Best Start program was previously available for a much broader range of transportation needs. Best Start funding for transportation is available for children six years of age and younger to attend registered day care. When the school board started providing transportation for all-day kindergarten, daycare and before/after school programs, both funding and ridership levels for LTA dropped substantially. At one point, they were receiving over \$60,000 from the program, but this amount has now fallen to less than \$5,000 per year.

There is also recognition that residents in the Town of Smiths Falls have the lowest mean income in the County and that there is a high percentage of people on social assistance. For this reason, it is not surprising that residents there require more of LTA's services. This also means that it is hard for town council to provide a level of assistance that compensates for this situation, given that their tax base is low considering the number of people on social assistance.

Another challenge currently being faced by the organization is related to addressing the physical needs of clients while also meeting the health and safety needs of the drivers. Concerns have been raised about back issues resulting from needing to assist an increasing number of bariatric clients in wheelchairs. This issue has been raised in other health and social service sectors as well.

Impacts and Successes

One of the reasons for Lanark Transportation Association's success has been the involvement of both municipal- and county-level representatives from the beginning. For instance, an initial board member was a municipal representative who had good working relationships at various local townships. This person had also been a representative at county council and therefore played an active role in helping to "make the case" to Lanark County Council. A finance and administration staff person at the county level was also instrumental in getting the Town of Smiths Falls Council to come on board. In both cases, having champions on the inside was key to obtaining political support. To this day, someone from Lanark County Council sits on the LTA Board of Directors and, while they are appointed by Council, those most interested typically step forward.³⁰

Prior to 2009, clients had to be registered with some form of social assistance to use LTA's service. Yet, staff and board members of the organization were concerned about people who were not registered with any service and still could not afford to pay for much-needed transportation. For example, people on ODSP have medical provision and assistance with transportation until the age of 65, but not beyond that. Once they turn 65, they need further assistance. Therefore, the Association changed its mandate to broaden what they could provide transportation for and to whom, as long as there was demonstrated financial need.

As a result of situations such as this, in 2010 Lanark Transportation Association also established a discretionary fund to further assist with the cost of transportation. This fund has grown over the last three years and is expected to continue to grow.³¹ It has been possible for LTA to create a discretionary fund because, along with financial support from the county and municipal levels, they are able to make use of money from the provincial gas tax fund for programming. They had previously been told

²⁹ This entire section came from the Interview with Marilyn Bird, Executive Director, Lanark Transportation Association, on June 4, 2014.

³⁰ Ibid.

³¹ Marilyn Bird presentation to Smiths Falls Council. Town of Smiths Falls Council Minutes, March 10, 2014.

that the gas tax money was only to be used for capital expenses such as vehicles. However, it was welcome news when they later learned that the fund could be used for program delivery as well. In addition, LTA is able to earn interest on a Guaranteed Investment Certificate (GIC) that it currently holds, and also generates a small amount of revenue from selling its used vehicles.³²

In terms of other accomplishments, Lanark Transportation Association was recognized in 2007 with an Ontario Trillium Foundation Great Grants Award in Human & Social Services. They have also served as an operating model for the North Frontenac Transportation Service and in 2011 completed a one-year rural transportation pilot project for the counties of Leeds & Grenville.³³

E. Future Considerations

Over the last thirteen years, Lanark Transportation Association has been able to not only survive, but continue to grow. LTA does not advertise, instead relying on the referrals of satisfied clients and agencies. Their high standard of service is made possible by the dedication and commitment of their staff, both drivers and administration, and volunteers. LTA owes its current success to them, and its financial stability to the continued support of Lanark County and the Town of Smiths Falls. In the words of Lanark Transportation Association Executive Director, Marilyn Bird, "Lanark Transportation Association continues to improve the quality of life for the most vulnerable members of Lanark County."³⁴

To date, Lanark Transportation Association has chosen not to develop a fixed-route or fare system given that it is expected to be more expensive for both the rider and the organization. However, last year was also the first time in many years that LTA actually lost money. As a result, the organization may have to consider increasing their established fare system in the coming year and may look more closely at other options, including even a fixed-route system.³⁵

³² Interview with Marilyn Bird, Executive Director, Lanark Transportation Association, on June 4, 2014.

³³ Marilyn Bird presentation to Smiths Falls Council. Town of Smiths Falls Council Minutes, March 10, 2014.

³⁴ Interview with Marilyn Bird, Executive Director, Lanark Transportation Association, on June 4, 2014; and Marilyn Bird, Executive Director's Report, Lanark Transportation Association Annual General Meeting, 2009.

³⁵ Interview with Marilyn Bird, Executive Director, Lanark Transportation Association, on June 4, 2014.

CASE STUDY #8

Ride Norfolk

Information for this case study was provided by
Brad Smith, Public Transportation Coordinator, Norfolk County



A. Overview of Transportation Initiative

The Ride Norfolk bus service was established in 2011 to provide reliable, affordable and accessible transportation options to residents of Norfolk County. It is operated by the Community Services department of Norfolk County and overseen by the Ride Norfolk Transportation Committee (RNTC). A Public Transportation Coordinator is employed by the County to manage the service. One accessible bus provides public transportation within Norfolk County under a service contract with Donnelly Transit Inc. a company that provides transportation services within southern Ontario. The bus operates a fixed route service from 8:00 a.m. to 6:00 p.m., Monday to Friday. Each day of the week has a different route, with scheduled stops in a total of twelve different communities as well as several stops within the five larger towns. Fares cost \$2.00 for in-town rides and \$6.00 each way when travelling between towns.

B. Community Profile

Location

Located on the north shore of Lake Erie in the heart of southwestern Ontario, Norfolk County is adjacent to Elgin County, Oxford County, Brant County and Haldimand County. It is comprised of several small communities spread across approximately 1,623 square kilometres or 403,869 acres.¹

Demographics/Density

Norfolk County is a single-tier municipality with a population of 63,175, according to 2011 Census data.² A survey of 86 Ontario Municipalities conducted by BMA Management Consulting Inc. shows that Norfolk has a population density of 39 persons per square kilometer, compared to an average of 587 for the 86 participating municipalities, and an average of 551 for the southwest region.³

Political and Governance Structures

Norfolk was first created as a county in 1792. In 1800, Haldimand was formed from a portion of Norfolk. In 1974 the counties were reunited as the Regional Municipality of Haldimand, but were separated again in 2001.⁴

Economy

Norfolk County has a strong agricultural sector, due to a mild climate, lengthy growing season and some of the most fertile land in Ontario. It has long been the centre of the tobacco belt, but as tobacco consumption has declined substantially, many farmers are now growing lavender, ginseng, hazelnuts and wolfberries.⁵ Manufacturing and tourism are also important components of the county's economic base.

¹ Norfolk County Economic Development: www.norfolkbusiness.ca/invest-in-norfolk/location-demographics. Accessed January 29, 2014.

² Norfolk Tourism: www.norfolktourism.ca. Accessed January 29, 2014.

³ BMA Municipal Study 2012: [www.norfolkcounty.ca/download/government/BMA Municipal Study 2012.pdf](http://www.norfolkcounty.ca/download/government/BMA_Municipal_Study_2012.pdf). Accessed February 3, 2014.

⁴ Norfolk County Council Strategic Plan, p.2: www.norfolkcounty.ca/download/government/countystratplan0910.pdf. Accessed January 29, 2014.

⁵ http://en.wikipedia.org/wiki/Norfolk_County,_Ontario. Accessed February 3, 2014.

Major Travel Destinations

The county seat and largest community is Simcoe, with a population of 15,500. Simcoe is a main destination as more professional services, government offices and retail outlets are located there than any other community in the county. Port Dover, Delhi, Waterford, Port Rowan, Courtland and Langton are other larger communities in the county. Long Point, a 40-kilometre spit of land projecting into Lake Erie, is an important location for bird migration and was designated a World Biosphere Reserve by UNESCO in 1986. Long Point Provincial Park is located on the point.⁶ Norfolk County's most popular tourist attractions are the ports, towns and villages along Lake Erie, known as Ontario's South Coast. These towns include Port Dover, Turkey Point and Long Point. Fishing is another key attraction for tourists, as well as birding, hiking, camping and cycling.⁷

Local Transportation Context

Rural transportation issues within the Counties of Haldimand and Norfolk are long-standing. The lack of public transportation affects everyone, but it is a particular challenge to high-risk populations including the elderly, children, people with disabilities and low-income families. While there are some specialized transportation services provided by various community organizations, prior to the establishment of Ride Norfolk, there was no public transit system to connect people internally or to communities outside the counties.

There are particular challenges in developing a transportation service in Norfolk. Since the overall population density is very low, and the towns are spread out across the county at distances of 15 to 40 kilometres, it is quite costly to operate. The main towns in Norfolk County are configured in a hub-and-spoke formation, with transportation corridors that connect the smaller towns to Simcoe as the hub.

C. Background

Previous Public Transportation Initiatives⁸

Several attempts have been made in the past to implement some form of public transportation in Haldimand and Norfolk Counties.

In 1991, the study *Transportation Needs of the Elderly and People with Disabilities in Haldimand-Norfolk* was commissioned. Some of the key findings of this study include the following:

- Current transportation providers were community-based volunteer services, family, friends, neighbours and service providers.
- Among residents 55 years or older, 13% identified a need for additional transportation services and 6% of this population was critically disadvantaged, as they were without even an informal support network.
- Participation in social activities, health and medical services and out-of-region medical appointments were the main reasons for needing transportation.

As a result of this study, the Haldimand-Norfolk Transportation Task Force was established in 1994, and a consultant was hired to develop an implementation plan. Shortly thereafter, the Haldimand-Norfolk Community Senior Support Services Inc. began to operate a transportation system using a blend of volunteer drivers and paid drivers for its three accessible vans. Transportation services are continuing to be provided by Seniors Support Services so seniors can attend day programs, shop and attend medical appointments.

In 1997, the Community Transportation Action Program (CTAP), a provincial program, provided funding for communities to develop transportation resources and services across Ontario. The Haldimand-Norfolk CTAP

⁶ Ibid.

⁷ Norfolk Tourism: www.norfolktourism.ca. Accessed January 29, 2014.

⁸ Background information on transportation services in Norfolk County was compiled through an interview with Brad Smith, Transportation Coordinator, Ride Norfolk; and from *Spinning Your Wheels: Public Transportation Systems in Haldimand County and Norfolk County – Feasibility Study*, by ENTRA Consultants, August 2009.

Steering Committee was formed and hired a private carrier to operate a transportation service for which riders paid a fee. In February 1999, a review of the pilot service identified the following challenges:

- The rural nature of Haldimand & Norfolk with low population was not conducive to trip sharing.
- The high cost of single trips was prohibitive.
- Some agencies were able to provide transportation for their clients.
- There were restrictions to the shared use of some agency vehicles.
- Agencies could not subsidize private carriers when volunteer drivers were more cost-effective.
- The sustainability of the system would be dependent on fundraising.

When the provincial CTAP mandate and funding ended, the Steering Committee determined that a continuation of the project was not possible and disbanded.

Background of Current Initiative

The Haldimand & Norfolk Rural Transportation Initiative (H&N RTI) was formed in 2006, with representation from a broad cross-section of community organizations. Member organizations include the Best Start Network, Children's Aid Society of Haldimand & Norfolk, Work Force Planning Board of Grand Erie, Haldimand-Norfolk R.E.A.C.H., Haldimand & Norfolk Women's Services, Norfolk District Business Development Corporation, the Consolidated Municipal Service Manager for Haldimand & Norfolk Counties and the United Way of Haldimand and Norfolk.

The H&N RTI was very active over the next few years; they conducted research, held community consultations, surveyed community organizations and the general public, and conducted a peer review of models of rural transportation in comparative communities. Of 29 community organizations surveyed, 86% identified the need for transportation for their consumers, and 89% indicated that the lack of transportation is a barrier to accessing their service. Furthermore, 63% of the agencies were already providing or paying for transportation for their clients, and 100% of respondents indicated they

would or might support a consumer transportation system if one was created for Haldimand & Norfolk.

Following up on the recommendations from the 2006 survey, in 2008 a more detailed survey was distributed to 345 organizations in Haldimand and Norfolk, of which 142 completed the survey. The purpose of the survey was to compile a current transportation inventory for Haldimand and Norfolk and gather information to inform a transportation feasibility study. The H&N RTI, realizing that the success of a public transportation system would rely heavily on use by the general public, also surveyed the community at large. Ninety-two percent of respondents indicated that Haldimand and Norfolk Counties need a public transportation system, for the following purposes:

- Respondents in general would use public transportation for recreational and social activities (69%), followed by attending medical appointments (59%).
- Younger respondents are most likely to use it for recreational and social activities (81%), followed by employment needs (73%).
- Older respondents are most likely to use it for medical appointments (75%), followed by recreational and social activities (63%).
- Low-income respondents would use it for medical appointments (78%) and recreational and social activities (77%).

The H&N RTI secured funding from the Ontario Trillium Foundation to hire a transportation consultant to explore the feasibility of establishing a public transportation system in Haldimand and Norfolk Counties. The feasibility study provided a thorough examination of conditions and factors related to the development of a public transportation system in Haldimand and Norfolk counties, and made several recommendations regarding the type of service, routes, schedules and fares. The report from the feasibility study was presented to both councils. Haldimand County Council declined to participate in developing a public transportation program due primarily to funding concerns, but Norfolk County Council decided to proceed with the plan. At that point, the H&N RTI was disbanded and the Transportation Coordination Team

(TCT), later named the Ride Norfolk Transportation Committee (RNTC), was established. The feasibility study was updated in September 2010 to focus solely on Norfolk County.

The recommendation of the transportation consultant was to adopt a fixed route service with a paid driver. Consideration was given to expanding the volunteer driver program, but too many difficulties were encountered. For many of the participating organizations, providing financial support for a shared service would be outside their mandate; some were already pushing their mandate by sharing their vehicles, drivers and resources with each other. For some, there would have been significant implications or insurance and mileage costs. In contrast, by choosing a fixed route service and contracting with a transportation carrier for the bus and driver, the insurance coverage and liability becomes the responsibility of the carrier.

Ride Norfolk was launched in 2011 to provide reliable, affordable and accessible transportation options to residents of Norfolk County. It is operated by the Community Services department of Norfolk County. The Ride Norfolk Transportation Committee (RNTC) acts in an advisory role to both County Council and to the Public Transportation Coordinator. It is a volunteer committee of public sector organizations, many of whom are members of the H&N RTI. The mandate of the committee is twofold:

- i) To provide the overall guidance and direction in the development, implementation and operation of a fixed route and on demand public transit service in Norfolk County; and
- ii) to explore opportunities for future expansion into the outlying areas of Norfolk County and the development of interconnecting transit routes throughout the South Central Ontario Region (SCOR) and Haldimand County.

Initially, from 2011 to 2012, the Children's Aid Society was the lead agency for Ride Norfolk, holding the contract with Sharpe Bus Lines. In 2012, the operation was moved to the County so it could be eligible to receive gas tax funds.

The service is now provided by Donnelly Transit Inc., a company based in St. Thomas, which provide transportation throughout southern Ontario through a "family of companies." Ride Norfolk is listed on their website (www.coxtransportation.ca) as one of the services they provide.

Initial Funding Sources

The first Transportation Coordinator position was funded by the South Central Ontario Region, a group of five tobacco-producing municipalities that organized to help with the transition from tobacco production to other types of agriculture. They also received funding from the Rotary Club and United Way, which sponsored a week of free bus rides as a marketing promotion. They have considered raising funds by providing advertising space on the bus, but because they do not own the bus, they would need to work with the contractor to determine income splitting and acceptable advertising.

No capital investments were required, as the bus service is contracted out to a private carrier. The committee had considered buying a bus, but when owning was compared to leasing, it was found that the savings were negligible for a single bus.

Local Support for Transportation Initiative

Support for developing a local transportation initiative has been mixed. Since there is no history of public transit in the county, many residents are not familiar with transit services and do not have the same expectations as urban dwellers for an economical mode of transportation. Local service agency personnel have been champions of a universally available transportation program, and the current mayor has been very supportive. However, there are concerns about the use of public funds to provide the service, and some have the perception that the transportation service is diverting tax funds from other needed areas. It was noted during an interview with the Public Transportation Coordinator that the main source of funding for the program is the provincial gas tax fund, which is dedicated specifically to transit service improvement.

Legal and Liability Issues

The process of accessing the gas tax fund presented challenges. County Council was required to develop and pass a precisely worded bylaw to enter into an agreement with the province. While the provincial funds were helpful, the program favours more densely populated areas and more established programs. It is not designed for programs that involve long drives through sparsely populated areas.

Ride Norfolk conforms to the transportation segment of the Accessibility for Ontarians with Disabilities Act (AODA, 2005), and conformity to the Act is regularly scrutinized. The bus is accessible, and the necessary policies have been introduced. For example, the driver makes sure that a person using a walker stores it in a safe way while riding the bus.

D. Current Operations

Routes and Schedules

Ride Norfolk has stood by the original decision to provide a fixed route service, for which the hub-and-spoke configuration of the towns in Norfolk, connected by pre-existing transportation corridors, is particularly suited.

The routes have stayed constant since the start of the service, but some of the stops and the frequency of trips have been altered to align with service demand. The main change from the initial schedule is that, rather than travelling directly between communities, the bus now travels on a loop in each of the main towns before moving on to another town. There is an in-town loop offered in Simcoe seven times per day. There are five out-of-town routes with a different route being offered daily. Each of the urban centers receives service on one to two days per week. The routes and schedule may be viewed at www.ridenorfolk.ca.

Ridership

The decision to use a fixed route rather than an on-demand service was also based on a strong preference by community agencies for an inclusive service that would be used by the general public as well as individuals with disabilities. There is no application form or means test



required; anyone with two dollars can get on the bus. Community agencies supported this decision as it provides privacy, autonomy, independence and socialization for their clients.

Ridership on the bus averages between 25 and 30 on a typical day, with a range from 10 to 40. The bus is more popular in the summer than in the winter. The least number of riders for both 2012 and 2013 was counted in the month of January. Many of the riders are first-time riders; the service is still growing as more and more people learn about it. Some people use it to get to work on a regular basis; others use it for medical appointments, shopping, leisure activities and visiting friends and family. It is used mostly by people who do not own a car or do not drive. Many seniors use it, but other frequent rider groups include single mothers, students and persons with limited mobility. The bus is more popular in the summer than in the winter. The least number of riders for both 2012 and 2013 was counted in the month of January.

Operating Costs and Revenues

Bus fare for Ride Norfolk is \$2.00 for an in-town ride and \$6.00 when travelling between towns. This provides only a small portion of the funds required to operate the service. In its first year of operation, the cost to the municipality was \$334,941, but by 2013 it was reduced by 64% to \$95,000. This reduction was due to offsets from the provincial gas tax fund and a change in carriers that resulted in significant savings. In 2013, the offsets by the gas tax amounted to \$45,000, and ridership revenues accounted for \$18,000.

Challenges

The main challenge faced both during the development of the bus service and on an on-going basis is the economic

reality of providing an affordable public transportation service in a very low density area. There can be no expectation that the service will come close to self-sufficiency; it must be accepted as a vital public service that warrants public funding. This attitude, however, has not been adopted by all residents in the county. The service has been panned by residents who do not share the RNTC's priorities and have unrealistic expectations for ridership and cost recovery. It is inevitable that in operating a fixed route service there will sometimes be an empty bus on the road, whether on its way for maintenance, coming out of service or on a slow day. However, there are frequent comments made about an empty bus travelling around the county.

Impacts

Economic: Ride Norfolk has had a significant economic impact on county residents. The most obvious is the reduction of the cost of transportation for those that do not have access to a vehicle. A round trip cab ride from Port Rowan to Simcoe can cost \$180. The same trip made on the Ride Norfolk bus costs between \$10 and \$12. Social service agencies that pay for clients' transportation to medical appointments have reported considerable cost savings as a result of the bus. The bus has also contributed to increased employment as it enables workers to get to out-of-town jobs. Also, being able to shop at a grocery store rather than at a convenience store has increased both the economy and quality of many people's food purchases.

Social: The bus has also had a major impact on the social lives of riders. For many, riding the bus provides opportunities for social interaction. The bus routes take into account people's desire to go on social outings, with stops at the farmers' market, the swimming pool in Simcoe, Turkey Point Provincial Park in summer and the Port Dover beaches.

Mental Health: A representative of the Canadian Mental Health Association works with the RNTC, in acknowledgement of the important role public transportation plays in promoting mental health. The value of the increased self-esteem that is generated from being able to move around the community freely is considerable. Mental health staff have expressed to the

Public Transportation Coordinator that the bus is very important to their clients. It enables people to get to more activities and is non-stigmatizing.

Riders also have a strong sense of ownership of the bus, and a certain level of camaraderie has developed among riders. Another important function of the bus is that it serves the nursing home, which allows family members to visit the nursing home residents and enables residents who are able to ride the bus to go out more frequently.

Physical Health: The most obvious impact on health is in the increased ability of people without vehicles to attend medical appointments. For example, one of the nursing home residents needs to be in a wheeled bed for transportation, and he is able to use the Norfolk Ride bus.

Active Transportation: The bus contributes to active transportation in several ways. First, fixed stops require riders to walk to bus stops, increasing the level of activity over that of a door-to-door service. Ride Norfolk also specifically promotes the use of the bus to get to one of the many trails in the county. Second, all of the towns in Norfolk County are connected through trails created from abandoned railway tracks. Those who cannot walk the full distance can take the bus one way and walk back. Finally, it is possible to take a bicycle on the bus if the wheelchair space is not being used. The idea of mounting a bicycle rack on the bus was explored but was not pursued. It could not be the same type as for urban buses due to the distance of the trips and the condition of the roads; a stronger, more expensive type of rack would be required.

Community Support

While there has not been a formal evaluation of the bus service, daily statistics on ridership are tracked and a quarterly report containing ridership and revenue data is submitted to County Council. An attempt to undertake a qualitative evaluation would be hampered by the small sample size, which could skew the results significantly. Despite the lack of a formal evaluation process, Ride Norfolk collects a substantial amount of information about its service. The public is encouraged to provide feedback through the Ride Norfolk website, and a number of polls have been conducted. In addition, the driver has been with

the service since it started and is an invaluable source of information about the needs and interests of the riders. Changes have been made to the service as a result of the feedback from riders, including the aforementioned route changes. In three years of operation, there has been growth in ridership and revenue as the community continues to understand and embrace the service.

In the early days of the bus, it received criticism from some sectors. However, it seems that public opinion is beginning to change. As the costs continue to decrease and more people are using the service, more support is being generated. Now that the bus has been in operation for a few years, residents are seeing its value. However, some still see it as wasteful and unnecessary. Some have also complained that it is taking people out of town to shop in neighbouring towns, to the detriment of the town in which they live. In reality, however, the bus takes people both in and out of town.

F. Future Considerations

The Ride Norfolk Transportation Committee is continuing to work towards the goal for transportation services in Norfolk: “to implement an efficient system that can respond to the transportation needs of all citizens regardless of age, health, ability or socioeconomic status.”

As a result of community polls and other feedback received about transportation services in Norfolk County, it became apparent that the bus was not meeting the needs of all county residents. There are many people that cannot take a public bus and require a specialized, door-to-door, on-demand service. While some agencies provide transportation to their clients, many people were without assistance for their transportation needs.

Four agencies operating in Norfolk have their own vehicles to transport clients. Representatives of these agencies met in January 2014 to discuss the possibility of sharing resources. They realized that on some days two different agencies made the trip to the same area, carrying one passenger each, while, at the same time, the bus was travelling the same route and with no passengers.

They agreed to work together to develop a collaborative, integrated transportation service. The Public Transportation Coordination Office will act as a

dispatch centre to provide information about available transportation services and schedule on-demand services. Their software, which is designed specifically for transportation scheduling, will be used by all the participating agencies to schedule their vehicles. Everyone will be able to see the schedules so that they can coordinate their transportation services. The Public Transportation Coordinator will take calls from other county residents and schedule rides for them as vehicles and drivers are available. Riders will be charged \$0.45/km., which is more affordable than other options such as using a taxi or renting a car. For example, the trip from Port Rowan to Simcoe will cost \$15 instead of \$90, the current cost of cab fare for the same trip.

A three-year grant was received from the Ontario Trillium Foundation to purchase and provide training on the scheduling software as well as funds for marketing the program. Haldimand and Norfolk’s Women’s Services is the agency that is hosting the grant for integrated services. They have three years to create a sustainable service. Participating agencies may be asked to pay a membership fee, or Council may be asked to provide funding for the program if it can be shown that the service is being well-used. Council is supportive of this development as they have been hearing about this gap in service from their constituents.

There have been obstacles to the participation of some agencies in the integrated service. Each agency will have to sign a letter of memorandum to participate in the integrated transportation service. There have also been issues around insurance. For example, one agency was told by their insurance company that they would need to change their policy to cover the operation of public vehicles, which would have been very costly. Others faced restrictions regarding the borders within which they were able to travel, or on providing transportation to non-clients.

There do not appear to be any changes on the horizon at present that will affect Ride Norfolk. It is as stable as it likely ever will be. The budget is always a concern, but as long as there are no drastic changes to the county’s economy, it is likely that there will continue to be sufficient support for the bus to continue to operate.

CASE STUDY #9

Saugeen Mobility and Regional Transit (SMART)

GREY AND BRUCE COUNTIES

Information for this case study was provided by
Roger Cook, Manager, Saugeen Mobility and Regional Transit (SMART):

A. Overview of Transportation Initiative

Saugeen Mobility and Regional Transit (SMART) is an Ontario corporation without share capital owned by the participating partner municipalities in Bruce and Grey counties. The goal of SMART is “to provide a safe, dependable and affordable transportation service to any eligible client who wants service when they want it.”

The service provides non-emergency medical, employment and social transportation to individuals and groups in eight municipalities in the Counties of Bruce and Grey. The service is provided for residents with physical and/or mental challenges (including visual and cognitive challenges).¹

Individual fares to destinations within the service area are \$2.00 plus \$.30/km, subject to a \$5.00 minimum. Fares to destinations outside the service area are \$.30/km plus \$18.00 per hour.

B. Context

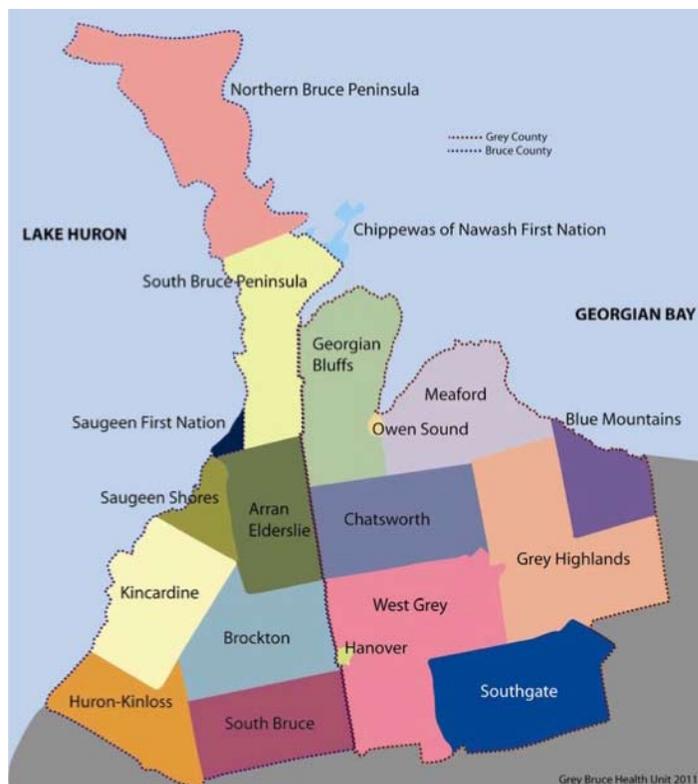
Location

Grey Bruce is located in the South West Region of Ontario. It is bordered by water on the west by Lake Huron and by Georgian Bay on the north. Simcoe and Dufferin Counties border on the east, and Huron and Wellington Counties border it on the south.²

The total land area of the two counties is 8,587 square kilometres, with Grey County accounting for 4,508 square kilometres and Bruce accounting for 4,079 square kilometres.

Demographics/Density

A total of 157,760 people live within Grey Bruce. Fifty-four percent of the population lives in a rural setting, while 46% lives in urban centres. Owen Sound is the only city in Grey Bruce, with a population of 22,000, while the other urban settings have populations of fewer than 10,000 people.



According to the Grey Bruce Health Unit’s Healthy Communities Picture (2011), the combined population in the two counties has grown by approximately 1,100 people each year since 2001. The two age groups that have grown the most are those between 45 and 54 years and those between 55 and 64 years.

With 18% of the population over the age of 65 years, Grey Bruce has a higher percentage of seniors compared to the provincial average. The two areas with the highest percentage of seniors are the Northern Bruce Peninsula (28%) and The Blue Mountains (25%).

Children and youth still represent a significant portion of the population in Grey Bruce with 22% of the population aged 0-18 years. Areas with the largest proportion of their population under the age of 15 years are Saugeen First Nation (27.8%), Chippewas of Nawash First Nation (22.9%), Southgate (21.8%) and South Bruce (20.6%).

¹ As referenced on the Bruce County Seniors’ Portal/Transportation Services: www.bruceseniors.com/index.php?page=listing&municipality=6&category=18&sub_cat=109, accessed May 17, 2014.

² L. Wonnacott, and C. Ferguson (2011). *Grey Bruce Healthy Communities Picture*. Grey Bruce Health Unit: Owen Sound, Ontario.

Compared with the province as a whole, Grey Bruce is not very diverse ethnically. Less than 2% of the population is comprised of visible minorities, and the immigration rate is only 8% compared with 28% for the province.

The two counties have a combined Aboriginal population of 3,655, which represents 2.4% of the total population. There are two First Nation Reserves within Bruce County: The Chippewas of Nawasah Unceded First Nation and the Chippewas of Saugeen First Nation.³

Political and Governance Structures

Within the two Counties (upper-tier municipalities), there are 17 lower-tier municipalities.

Bruce County⁴

- Municipality of Arran-Elderslie
- Municipality of Brockton
- Township of Huron-Kinloss
- Municipality of Kincardine
- Municipality of Northern Bruce Peninsula
- Town of Saugeen Shores
- Municipality of South Bruce
- Township of South Bruce Peninsula

Grey County⁵

- Township of Chatsworth
- Township of Georgian Bluffs
- Township of Grey Highlands
- Town of Hanover
- Town of Meaford
- City of Owen Sound
- Township of Southgate
- Town of The Blue Mountains
- Township of West Grey



Major Industries

The Invest in Grey Bruce website highlights five major economic sectors in the region:

1. Agriculture, including traditional agri-businesses as well as newer areas such as bio-products, agri-tourism and commercial aquaculture
2. Manufacturing, including food, furniture and wood products, transportation equipment, machinery manufacturing and printing operations
3. Tourism, capitalizing on numerous events and festivals, natural attractions and the popular destination of Blue Mountain
4. Energy and Environment, including the Bruce Nuclear Power Plant in Tiverton and a growing green energy component
5. Retail, second only to manufacturing for employment opportunities, with over 12% of the population employed in this growing sector.⁶

³ Ibid.

⁴ www.brucecounty.on.ca

⁵ www.grey.ca

⁶ www.investingreybruce.com

C. Background

Initiative Background

Started in 1977 as the Bruce, Grey and Huron Disability Transportation Corporation, SMART has a long history of providing transportation services to residents of Grey and Bruce with mental and physical challenges.⁷

In the latter part of 2009, the organization went through a restructuring and name change that placed an emphasis on mobility versus disability. A new board of directors was also established.

According to Roger Cook, Manager of SMART:

*“These are outings that would have been difficult or impossible if this service were not in place. Many of these residents have no family members nearby to assist with their mobility needs and for those who do have family members nearby, very often those family members are unavailable to provide assistance because of employment or lack of appropriate accessible vehicle.”*⁸

*The rides provided by SMART are, therefore, a vital lifeline for these community members to keep medical appointments, attend to employment obligations, enjoy social outings and generally maintain a sense of personal independence.”*⁸

D. Current Operations

In 2013, the SMART program provided a total of 21,052 rides. As per the organization’s mandate, the ridership is comprised of people with mental or physical challenges. According to the SMART website:

“Generally, service is provided to residents who cannot, because of their physical or mental challenges, travel by conventional transit or taxi. These challenges include the required use of crutches, a cane, a walker or wheelchair; visual impairments; cognitive impairments such as Alzheimer’s

and/or developmental challenges. Challenges need not be permanent; they can be temporary and/or seasonal.”

Schedules and Fares

The service is available only for residents of participating municipalities. However, the SMART website also indicates that rides will be provided to non-permanent residents and visitors, provided they meet the eligibility criteria.⁹

The service is considered “door-to-door”, which means that the drivers can assist clients from their place of residence to the vehicle, including the handling of packages and bags.

Residents wanting to use the program are encouraged to call the dispatch office a minimum of one business day in advance of the planned trip. However, they do indicate that they will accommodate notices of less than one day if possible.

Riders are required to complete a Client Registration Form (which can be completed online or obtained from the drivers) prior to receiving their rides, and they are encouraged to have their complete travel itinerary ahead of their ride and be ready to give the itinerary to their driver.¹⁰

Within the service area, local destination rides for individuals are \$2.00 plus \$.30/km and are subject to a \$5.00 minimum. Fares for destinations outside the service area are \$.30/km plus \$18.00 per hour from the time the driver picks up the client until he/she is finished with the driver and vehicle. However, riders are only charged for the actual driver time and mileage.

Clients are not charged additional fares when accompanied by an attendant or companion.

⁷ Saugeen Mobility and Regional Transit: Specialty Transportation for the Mentally and Physically Challenged summary report (July 11, 2011). Accessed May 1, 2014.

⁸ Ibid.

⁹ www.saugeenmobility.ca

¹⁰ www.saugeenmobility.ca/getting-started



Resources Available

SMART has a fleet of 22 vehicles, including:

- Two large, adapted buses for group outings
- Nine mid-sized adapted buses
- One conventional minivan, and
- 10 adapted minivans.¹¹

Drivers are also equipped with smartphones, and ride information is dispatched to the drivers through their smartphones.

The most current financial statements (2013) indicate that the SMART program had \$1.51 million in revenues, including \$375,000 in Municipal contributions, approximately \$186,000 in user fees and \$253,000 in an operating grant from the provincial gas tax funds. An additional \$336,000 was allocated through the gas tax funds for capital purchases for upgrading the fleet.

Operating expenses totaled almost \$963,000 with almost 50% of that going to wages.

Currently, the Town of Hanover acts as “Host Municipality” for the purpose of “receiving and holding” the Gas Tax funding. According to the Manager’s summary report from 2011, “This funding is paid annually and is held in trust until such time as it is used for capital purchases, operational deficits or other projects deemed to be improvements to the transit service in accordance with MTO guidelines.”¹²

Organizational Structure

SMART is a registered charity and government not-for-profit organization (GNPO) incorporated without share capital. The organization is owned by the participating municipal partners and is governed under the terms of the Partnership Agreement signed by each municipality.¹³

As an incorporated not-for-profit, there is a Board of Directors, which is comprised of representatives from each partner municipality. Each municipality is entitled to send one representative as a member, from which the Board of Directors is elected. The Board meets once monthly unless otherwise required.

The organization has a staff of three: Manager, Secretary-Treasurer and Dispatcher, and Accounting Clerk.

¹¹ Saugeen Mobility and Regional Transit: Specialty Transportation for the Mentally and Physically Challenged summary report (July 11, 2011). Accessed May 1, 2014.

¹² Ibid.

¹³ As referenced in the Saugeen Mobility and Regional Transit Financial Statements for the year ended December 31, 2013 (March 27, 2014). Received electronically from Roger Cook, May 1, 2014.

In keeping with the Ministry of Transportation approach, the municipal contributions are calculated annually with 30% of each municipality's amount determined by the population size, and 70% determined by ridership numbers.¹⁴

New municipalities interested in becoming part of the program can participate on a trial basis for one year. Because ridership numbers are unknown, first-year trial rates are based solely on the population figures.¹⁵

Impacts

According to the most recent ridership numbers (2013), over 21,000 rides were provided through the SMART program. Although a formal evaluation of the program has not been conducted, the Manager reported that the most obvious impact is reflected in the ridership numbers over the years and the fact that the program has been able to provide a service to people with mental and physical challenges who otherwise would not be able to afford the transportation.

He also indicated that there have been numerous anecdotal comments speaking to the benefits, including reduced isolation and increased opportunities for social interaction.

E. Future Plans

With an aging population in Grey and Bruce Counties, there will likely be an increase in the number of housing units built for this demographic. If this happens, there will be an even greater opportunity for the SMART program: "A safe, dependable and affordable transportation service for those residents is going to be a critical part of their quality of life and their being able to remain independent for as long as possible."¹⁶

There are currently eight partner municipalities with at least one actively involved with the trial program. According to the Manager, a goal is to continue attracting and involving other municipalities in the Grey Bruce region.

Another longer-term possibility for the program is to expand its mandate beyond those with mental and physical challenges and have the SMART program become the central organization for all specialized transportation in the Grey Bruce area and bring together the various transportation services offered by various Ministries in the different corners of the two counties.¹⁷

¹⁴ Saugeen Mobility and Regional Transit: Specialty Transportation for the Mentally and Physically Challenged summary report (July 11, 2011); accessed May 1, 2014.

¹⁵ Telephone interview with Roger Cook, Manager, April 28, 2014.

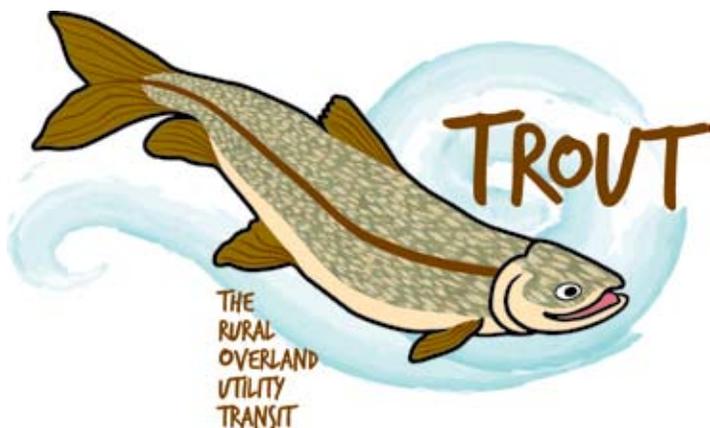
¹⁶ Saugeen Mobility and Regional Transit: Specialty Transportation for the Mentally and Physically Challenged summary report (July 11, 2011); accessed May 1, 2014.

¹⁷ Ibid.

CASE STUDY #10

The Rural Overland Utility Transit (TROUT)

Information for this case study was provided by
John Keith, Manager of Transportation Services, and
Gord MacDonald, Executive Director, Community Care North Hastings



A. Overview of Transportation Initiative

The Rural Overland Utility Transit (TROUT) service was launched on May 3rd, 2010 after expanding an existing 'handi-bus' service for seniors so as to provide broader public transit for those within and around the town of Bancroft. The TROUT offers a combined fixed route and specialized service as an efficient and effective model of operation for the area. There are four community buses, which all accommodate wheelchairs, travelling on three out-of-town routes and one within town. Each of the out-of-town routes runs one day per week, while the Bancroft route runs daily. The TROUT's current owner and operator, Community Care North Hastings (CCNH), believes that collective operation of the public transit service by a local Transit Commission will make it more feasible and sustainable in the long term.

B. Community Profile

Location

Located in Central Eastern Ontario, about 2.5 hours west of Ottawa and a half-hour south of Algonquin Park, Bancroft is the town centre from which The Rural Overland Utility Transit (TROUT) operates. Covering approximately 3,380 square kilometres, the TROUT provides service to eight municipalities including the: Town of Bancroft, Municipality of Highlands East, Carlow Mayo Township, Township of Faraday, Municipality of Hastings Highlands, Township of Tudor and Cashel, Township of Limerick, and Wollaston Township. Seven of the municipalities are located in Hastings County and what is known as North Hastings. One of the municipalities, Highlands East, is located in Haliburton County.¹

Demographics/Density

Each of the eight municipalities served by the TROUT has small villages or towns, with the exception of Faraday. The overall population density of the area is 4.5 per square kilometre, ranging from 1.3 per square kilometre to 16.9 per square kilometre.² The total population for the area is 15,303, and the median age is 52, which is higher than the provincial average.³ North Hastings and Highlands East both have a large number of seasonal residents with almost half as many private dwellings occupied full time as the rest of the province.⁴

Political and Governance Structures

The Town of Bancroft, Carlow Mayo Township, Township of Faraday, Municipality of Hastings Highlands, Township of Tudor and Cashel, Township of Limerick, and Wollaston Township are all single-tier governments within the second tier of Hastings County. The Municipality of Highlands East is a single-tier government which is part of the upper tier of Haliburton County.

¹ Gord MacDonald and John Keith. TROUT Report to Municipalities 2010-12: Public Transportation in North Hastings and Highlands East Municipalities. Oct. 2012, p. 17.

² Ibid.

³ Statistics Canada 2012. Census Profile 2011.

⁴ Gord MacDonald and John Keith. TROUT Report to Municipalities 2010-12: Public Transportation in North Hastings and Highlands East Municipalities. Oct. 2012, p. 20.

Economy

The area was first settled for its mining, forestry/lumber and farming, but the main industry today is tourism. The number of tourists and repeat seasonal residents to the area has a high level of influence on the local economy, infrastructure and services.⁵ With many lakes, forests, rolling hills and interesting rock outcroppings, the area is known for its breathtaking natural landscape, as well as its adventure, recreation and leisure opportunities. The presence of the Canadian Shield and other geological structures draws many with an interest in collecting rocks and mineral specimens, and has earned the town of Bancroft the title of “the mineral capital of Canada.”⁶

Major Travel Destinations

The various villages and hamlets within North Hastings and Highlands East are spread around in a wheel and spoke formation, with roads connecting them to Bancroft as the hub. The town of Bancroft is a central spot for conducting commerce, accessing goods and services (such as medical and dental), and attending a variety of social and cultural events. While the population of the town is only 3,880, it also serves the populations of North Hastings, Highlands East and beyond.⁷ Bancroft is the main destination in the area, as any other and larger commercial destinations are approximately 1.5 hours away by car or bus.⁸

Local Transportation Context

Access to transportation has been a long-standing issue in North Hastings and Highlands East. Prior to the establishment of the TROUT, there was no fully ‘public’ transit system within the area (i.e., open to everyone). The nearly 3,500 square kilometres of what is sometimes



rugged rural terrain in the area create a particular challenge to operating a public transit service. For instance, “the abundance of gravel roads present major repair and maintenance challenges as these roads are typically much harder on vehicles.”⁹ In addition to maintenance and repair issues, the local geography adds both time and expense to the overall operation of a service compared to that in more urban communities.

Currently, there are two taxi services that are based out of Bancroft. A Greyhound bus service runs twice a week from Peterborough through Bancroft and onto Pembroke, and Foley Bus Lines provides service between Bancroft and Belleville on Fridays. There are also two local school bus lines that offer private charters. As well, three non-profit agencies provide specialized volunteer driver transportation services to their clients (Community Care North Hastings, Bancroft Community Transit and the Canadian Cancer Society).¹⁰

⁵ Gord MacDonald and John Keith. TROUT Report to Municipalities 2010-12: Public Transportation in North Hastings and Highlands East Municipalities. Oct. 2012, p. 20.

⁶ Wikipedia: The free encyclopedia: http://en.wikipedia.org/wiki/Bancroft,_Ontario. Accessed April 18, 2014.

⁷ Gord MacDonald and John Keith. TROUT Report to Municipalities 2010-12: Public Transportation in North Hastings and Highlands East Municipalities. Oct. 2012, p. 22.

⁸ Gord MacDonald and John Keith. TROUT Report to Municipalities 2010-12: Public Transportation in North Hastings and Highlands East Municipalities. Oct. 2012, p. 33.

⁹ Ibid.

¹⁰ Information provided by John Keith in the survey for the Environmental Scan.

C. Background

Previous Public Transportation Initiatives

Community Care North Hastings (CCNH) first started a “handi-bus” service for their clients in 1989. It provided transportation services for seniors and the physically challenged within the communities of North Hastings and Highlands East. It was organized as a form of ‘specialized’ transportation where individuals would call into CCNH in advance to book a ride. Each day of the week, the bus visited a different area of the region to pick up riders so that they could attend medical appointments, buy groceries and conduct errands in the Town of Bancroft. The approach was similar to what the TROUT travels today. Tuesdays were scheduled for residents of Hastings Highlands; on Wednesdays the bus visited the Coe Hill, St. Ola and Gilmour/Gunter areas; on Thursdays it was in greater Bancroft (including Bird’s Creek); and Fridays were scheduled for Faraday, Cardiff and McArthur Mills. On Mondays, weekly trips were made to out-of-town locations to conduct activities unavailable in Bancroft, such as visits to museums and art galleries, and for excursions to special events, such as viewing the fall colours and attending Christmas celebrations.¹¹

Background of Current Initiative

For some time, CCNH used only its charitable dollars to subsidize the handi-bus. However, providing this service was a substantial drain on the overall financial resources of the organization. As a result of discussions with the local Provincial Member of Parliament, CCNH decided to pursue the gas tax rebate for public transportation from the Province of Ontario. Given Provincial policies related to transportation and access to the Gas Tax Rebate, this decision also provided an opportunity to more actively engage with local municipalities.¹²



In 2008, CCNH organized meetings with each of the local municipal councils requesting resolutions for financial support based on a contribution formula that was developed. Discussions were also held with the County of Hastings and the Ontario Ministry of Transportation. “The County of Hastings stipulated that funds for transportation would be forthcoming only if Bancroft Community Transit and CCNH jointly provided transportation services in North Hastings.” While Bancroft Community Transit also provided a transportation service using volunteers, they did so for a different target population (i.e., those under the age of 55, and primarily [95%] Ontario Works [OW] and Ontario Disability Support Program [ODSP] clients). In the end, both organizations decided that they would continue to provide volunteer transportation services to their respective target groups, and that Community Care North Hastings would invest capital dollars and organizational resources to support the development of a new ‘public’ transit service.¹³

In 2009, public transit licensing was obtained and memberships were established in the Ontario Public Transit Association and the Canadian Urban Transit Association. On May 3, 2010, “The Rural Overland Utility Transit” or TROUT was officially launched as a local public transit service.¹⁴

¹¹ Gord MacDonald and John Keith. TROUT Report to Municipalities 2010-12: Public Transportation in North Hastings and Highlands East Municipalities. Oct. 2012, p. 8.

¹² Gord MacDonald and John Keith. TROUT Report to Municipalities 2010-12: Public Transportation in North Hastings and Highlands East Municipalities. Oct. 2012, p. 9.

¹³ Gord MacDonald and John Keith. TROUT Report to Municipalities 2010-12: Public Transportation in North Hastings and Highlands East Municipalities. Oct. 2012, p. 10.

¹⁴ Gord MacDonald and John Keith. TROUT Report to Municipalities 2010-12: Public Transportation in North Hastings and Highlands East Municipalities. Oct. 2012, p. 10 - 11.



Local Support for Transportation Initiative

Community meetings were organized during the fall of 2009 to gather public opinion, views and input about how a transit service should be organized. All input was considered in the process of developing the routes, schedules and fares for the service. Through initial surveys, 95% of the people surveyed said that they wanted and needed public transit.¹⁵ Community Care North Hastings also initiated a community contest for naming the service. TROUT became the name for the new public transit service given the significance the fish has for the region, as it is one of eight areas in the world that is home to a particular strain of lake trout.¹⁶

Routes, schedules and fare information were distributed as part of an overall awareness and marketing strategy. In response to requests, service to Hastings Highlands was

also established to accommodate both an anticipated need for extra coverage and for individuals wishing to use the service for employment purposes.¹⁷

Overall, local constituents have always been supportive of the transit service. Even those who do not use it have an emotional connection to the idea of providing people in need (such as seniors) with transportation. Such support was made clear during the local campaigns that raised money for buying the buses initially.¹⁸

Initial Funding Sources¹⁹

It took many financial partners and contributors to assist with the development of the TROUT. In the 2010/11 year of operation an application for a gas tax rebate from the provincial government was submitted, and \$84,926 was received. This amount increased to \$104,536 the following year (2011/12). The Town of Bancroft served as the 'host'

¹⁵ Interview with John Keith, Manager of Transportation Services, and Gord MacDonald, Executive Director, Community Care North Hastings on May 1, 2014

¹⁶ Gord MacDonald and John Keith. TROUT Report to Municipalities 2010-12: Public Transportation in North Hastings and Highlands East Municipalities. Oct. 2012, p. 11.

¹⁷ Ibid.

¹⁸ Interview with John Keith, Manager of Transportation Services, and Gord MacDonald, Executive Director, Community Care North Hastings on May 1, 2014

¹⁹ This entire section came from: Gord MacDonald and John Keith. TROUT Report to Municipalities 2010-12: Public Transportation in North Hastings and Highlands East Municipalities. Oct. 2012 – Chart: “Contributions Supporting the Development of Public Transit”, p. 13.

municipality for the gas tax rebate for all eight of the participating municipalities.

The local Community Futures Development Corporation (CFDC) made substantial contributions to the establishment of the public transit service in the first two years (\$50,000/yr). In the first year of operation (2010), the Town of Bancroft and the municipalities of Highlands East and Hastings Highlands made significant contributions as well (\$10,000, \$10,057 and \$8,153 respectively). In the second and third years of operation (2011 & 2012), all of those contributions decreased to \$7,759, \$6,057 and \$2,153 respectively, with the CFDC providing \$12,500 in the third year. The reasons for these reductions were considered to be 'political'²⁰ and are further explored in the "Challenges" section below.

Initial start-up funds were also provided by Community Care North Hastings in 2010: \$78,000 for capital expenses and \$26,452 for operational expenses. CCNH's level of funding contribution has continued over the last three years and ranged from \$70,000 to \$75,000 per year.

D. Current Operations

Community Care North Hastings presently owns and operates the TROUT. The TROUT public service consists of four community buses, employs five part-time/casual drivers, and makes 9,000 trips annually. While the TROUT is open to everyone in the community, about 70% of riders are older adults (i.e., 55 years of age and older).²¹

Routes, Schedules and Ridership²²

The TROUT employs a four-part public transit service mix to meet local demographic needs and geographic challenges. It is called a 'Blended Flex Public Transit Service' as it works to empower non-driving residents with greater mobility to access the goods, services, and social and cultural activities that allow them to remain in



the region with independence and dignity. The four parts consist of:

1. Scheduled Regional Routes
2. Door-To-Door Service
3. Individualized Service
4. Special Destinations

This type of approach also provides Community Care North Hastings with a variety of options for increasing ridership and therefore revenues.

1) Scheduled Regional Route Service

The TROUT offers regularly scheduled, fixed bus stop route service throughout the region. A daily route is provided within the town of Bancroft itself as it is the major goods and services area. The transit service then extends out to different parts of the region on specific days of the week, stopping at bus stops along the way to eventually bring riders into Bancroft. Regional pickups are made in the mornings, returning riders to their areas in the afternoon. The daily route service within Bancroft then connects riders from throughout the region to most businesses and all medical centres in the town.

²⁰ Interview with John Keith, Manager of Transportation Services, and Gord MacDonald, Executive Director, Community Care North Hastings May 1, 2014.

²¹ John Keith's presentation at the Bancroft Rural Transportation Summit November 15, 2013.

²² This section was based primarily on: 1) Catch the TROUT website: <http://catchthetrout.ca/category/media/>. Accessed April 28, 2014; 2) John Keith presentation at Bancroft Rural Transportation Summit, November 15, 2013; and 3) Interview with John Keith, Manager of Transportation Services, and Gord MacDonald, Executive Director, Community Care North Hastings, May 1, 2014.



2) Door-To-Door Service

Blended into TROUT's regularly scheduled route service is door-to-door service provided to qualified riders who are clients of CCHH (i.e., adults 55 years of age and older, and adults with physical disabilities). The TROUT transit drivers incorporate the door-to-door service pickups into their regular route schedules by picking up riders from their homes, as close as possible to the regular route times and locations.

3) Individualized Service

The TROUT also provides 'individualized' public transit for riders who require wheelchair accessible transportation outside of regularly scheduled route service. Riders use this service for purposes such as attending medical appointments or transportation home from the hospital.

4) Special Destination Service

Further incorporated into the TROUT's public transit service is 'special destination' service. This is offered to facilitate access to local special events, attractions and other destinations outside of regular route and time schedules. This aspect of the service connects riders to social and cultural activities and other destinations of interest that cannot be covered by regular route service. This component of the public transit service is valued as important to helping promote the mental, emotional and spiritual health of riders, thereby contributing to

overall wellbeing. For instance, Sunday bus service to area churches was tried in November 2012 and has become very popular, mainly via word of mouth. As a result, this has become an ongoing special destination public transit initiative.

Other services are also provided through private charters or hires and out-of-town trips. For instance, the TROUT provides busses and drivers as a revenue generator to help support the public transit service and provide an additional service which is appreciated in the community and viewed as vital to partners such as those in the tourism sector. The TROUT is similarly available to groups who wish to hire the service for private transportation to special occasions like weddings, moving large numbers of people and offering a safe and lawful alternative to drinking and driving. They also offer enriching trips to places outside of the area so as to connect residents to other destinations throughout the province (e.g., the National Gallery of Canada in Ottawa), with the goal of providing the same kind of access that owners of personal vehicles can enjoy.

The TROUT's Transit Operators are considered to be customer support workers, program coordinators, and customer service experts, as well as professional drivers. TROUT bus drivers are also aware of, and sensitive to, both the social and mental health benefits of interaction and actively encourage, and engage in, conversation and fellowship on the bus with riders as a result.²³

Historically, the service was based on a model involving a single staff person complemented by casual drivers. In June 2010, however, shortly following the launch of the service, a significant change was made to the staffing model to ensure reliability and consistency, and to allow the service to expand. The TROUT chose this part-time employment model after their full-time driver had a heart attack and rapid adaptation was required to continue service. Now, drivers can cover for one another and, as the service expands and increases, the number of driver hours offered can increase as well. This model also enabled the service to consider options such as the planned special

²³ John Keith's presentation at the Bancroft Rural Transportation Summit November 15, 2013; and blog by John Keith on the Catch the Trout website, Trout Public Transit Contribution to Local Sustainability, <http://catchthetrout.ca/trout-public-transit-contribution-to-local-sustainability/>. Accessed April 28, 2014.

destination trips and individual requests for charters for events, thereby providing other sources of revenue.²⁴

Over the course of service, ridership has more than doubled – going from 4,500 riders in 2010-2011, the first year of operation, to 9,126 riders in 2013-2014. In the April 1, 2012 to March 31, 2013 fiscal year alone, demand for the TROUT's service increased by 24% over the previous year. Increases in demand are expected to continue as ridership grows daily and the local population further embraces the advantages offered through public transit.²⁵

Operating Costs and Revenues

While ridership and the popularity of the TROUT continue to grow amongst constituents, current revenues are unable to adequately cover the costs of providing the service. In 2013, the operating expenses associated with the TROUT were in the area of \$180,000, with revenues from various sources at just over \$150,000, leading to a \$30,000 shortfall that year. As a result, CCNH had to make the hard choice of reducing their service level this past year.²⁶

CCNH's contributions along with the provincial gas tax funds provide the majority of revenues, followed by fares, municipal contributions, and then private donations or grants. Only three of the eight municipalities served by the TROUT currently provide financial support for the service, with just one of them providing the full amount that was requested of them by the operators.²⁷

In terms of fares, rides within Bancroft costs \$2.00, with various fees for regional rides costing an average of \$10.00 for a round trip to the far reaches of the catchment area (this also includes unlimited rides once in the town of Bancroft). For instance, between Maynooth, in the Municipality of Hastings Highlands, and Bancroft a one-way fare costs \$8.00 (\$7.00 for seniors and students). A Convenience Pass of 10 rides for \$50.00 is also available, with a cost of only \$5 per ride. In 2012, over \$20,000 was raised through fares and client fees.²⁸

The TROUT also offers display advertising opportunities on and within its buses. This is a chance for local advertisers to profile their businesses on a continuous basis in and on what is essentially 'a billboard on wheels'. Promotional service is sometimes offered free of charge, or at a reduced rate, to promote the TROUT's public transit and other services to riders. For example, promotional service was offered in recent years to connect riders with community activities and events such as Santa Claus parades, luncheon socials, community activities and other local initiatives.²⁹ Revenues from the sale of Special Destination trips and Charters, along with advertising and merchandise, were over \$10,000 in 2012.³⁰

²⁴ Gord MacDonald and John Keith. TROUT Report to Municipalities 2010-12: Public Transportation in North Hastings and Highlands East Municipalities. Oct. 2012. Chart: "Contributions Supporting the Development of Public Transit", p. 12.

²⁵ Interview with John Keith, Manager of Transportation Services, and Gord MacDonald, Executive Director, Community Care North Hastings, May 1, 2014; and Report to the News Media, blog by John Keith, Manager of Transportation Services: <http://catchthetrout.ca/category/media/>. Accessed April 28, 2014.

²⁶ Interview with John Keith, Manager of Transportation Services, and Gord MacDonald, Executive Director, Community Care North Hastings, May 1, 2014.

²⁷ Ibid.

²⁸ Ibid.

²⁹ John Keith. Blog: "About the TROUT." Catch the TROUT website: <http://catchthetrout.ca/category/media/>. Accessed April 28, 2014.

³⁰ Interview with John Keith, Manager of Transportation Services, and Gord MacDonald, Executive Director, Community Care North Hastings, May 1, 2014.

Challenges

The TROUT service is now entering its fifth year of operation but is struggling with funding shortfalls. Unfortunately, direct revenue from provision of the transit service is not enough to cover expenses and, like any other public transit system, it must be subsidized to be sustainable.³¹ The TROUT owners and operators would like to see one third of funding coming from the provincial government through the gas tax program, one third from the different municipalities being served combined, and one third from other revenues such as contributions through Community Care, private donations, and potential grants from the federal government.³² Municipal contributions, however, are not currently at this level.

Many small municipalities operate with extremely tight budget line items and need to address other issues first, such as road maintenance, so they question how they can possibly support public transit as well. Unfortunately, some municipal councils actually want to see a profit or at least direct returns on their investment. Not only is this difficult to demonstrate, but most evidence of the benefits of investment in public transit comes out of the United States, and the TROUT operators are unable to show how an investment of over \$100,000 translates locally into a \$100,000 return. At the TROUT, it is felt that local municipalities need to consider the 'triple' bottom line, as focusing only on the financial line is limiting: maintaining fiscal responsibility while at the same time weakening the social fabric of the community is considered to have negative long-term consequences.³³

As with most rural regions within the province, large catchment areas and sparse populations also make it a

challenge to provide public transit in North Hastings and Highlands East. Another challenge is the current car culture within rural communities. The private automobile has been the main source of transportation in rural Ontario for years and reliance on the car is deeply entrenched. While the introduction of public transit challenges present ways of thinking, it also opens new possibilities, and so it is believed that those who require, use and/or recognize the benefits of the TROUT service need to become more vocal.³⁴

Other challenges being experienced by the TROUT operators include CCNH's history of running the handibus. This causes confusion for people within the region as there is still a perception by some community members that the TROUT is just for seniors, so they continually need to raise awareness that this is not the case. Also, the fact that the TROUT is already established makes it harder to receive financial and other forms of support. For instance, local businesses say things like, "We are supportive," but they do not see any reason to provide financial assistance given the service already exists.³⁵

Finally, as part of the out-of-town special destination trips, the TROUT occasionally meets requests to go shopping in Belleville and then out for lunch. They receive negative feedback from some local businesses as a result. However, they try to point out that this is similar to private car owners who travel to the city and other larger destinations on occasion to purchase goods and services that are not available within Bancroft. Moreover, a local sustainability report, produced in 2011 and further explained in the next section, indicates that access to large urban centres needs to be occasionally provided in order to retain residents in rural areas in the long-term.³⁶

³¹ Ibid.

³² John Keith presentation at Bancroft Rural Transportation Summit, November 15, 2013.

³³ Interview with John Keith, Manager of Transportation Services, and Gord MacDonald, Executive Director, Community Care North Hastings on May 1, 2014; and Gord MacDonald and John Keith, TROUT Report to Municipalities 2010-12: Public Transportation in North Hastings and Highlands East Municipalities. Oct. 2012, p. 51.

³⁴ Ibid.

³⁵ John Keith presentation at Bancroft Rural Transportation Summit November 15, 2013; and interview with John Keith, Manager of Transportation Services, and Gord MacDonald, Executive Director, Community Care North Hastings, May 1, 2014.

³⁶ Ibid.

Impacts and Successes

In 2011 the Monieson Centre at Queen's School of Business was contracted by Community Care North Hastings to help evaluate the TROUT system and make recommendations to increase ridership and operational efficiency. The findings of the report included extensive research of existing theories and best practices for both urban and rural public transit development. The study was also designed to provide a practical guide for evaluating the TROUT's existing routes, comparing alternate routes and making decisions for further improvement. The outcome of the analysis showed that the transit system was very well designed and re-affirmed the current routes and schedules, with some recommendations for minor adjustments. The Queen's Report was useful in building credibility within the community as well, as a reputable academic institution was engaged in evaluating the transit system.³⁷

Overall, local feedback received about the transit service conveys that the TROUT has also had many positive impacts on its riders, but most of this has only been gathered anecdotally. Like other community transit services, the TROUT and its owner and operator CCNH do not have the time or resources to measure impacts using more scientific methods.³⁸ To date, they have had to rely on direct quotes from riders, such as those documented in the body and appendices of the TROUT Report to Municipalities 2010-12.³⁹

In 2011 the Town of Bancroft created a comprehensive report entitled, Sustainable Bancroft: An Integrated Community Sustainability Plan. It stated that Sustainable Bancroft was "about sharing a common purpose: sustaining a community where people thrive and enjoy a

good quality of life," contributing to growth, health, and wellbeing. The report identified transportation as "a core component of a sustainable community". The TROUT owners and operators feel that their public transit service plays a prominent role in sustainability of the region.⁴⁰

From an economic standpoint, the service supports the local economy by connecting riders with goods and services by providing access to 95% of Bancroft's businesses. It also offers access to local jobs, employs its own bus drivers and administration staff, and enriches local businesses through bus maintenance, fuel purchases, media promotions and other expenditures. Environmentally, it is a green alternative to personal vehicle use as it conserves fuel and reduces greenhouse gas and other emissions by transporting groups of people in one vehicle. Socially, public transit facilitates interaction between riders and drivers, as well as others at each of the local destinations. The TROUT also supports the cultural aspects of sustainability by further enabling residents to access cultural events and activities.⁴¹

Community Support

In the summer of 2012, over 5,600 survey postcards were distributed via the postal service to constituents of North Hastings and Highlands East to evaluate the service, provide evidence of its need and help plan for the future. Across all of the municipalities served, 93-97% of respondents rated the service as 'valuable' or 'very valuable'. Also, of the total respondents, 94% indicated a need and continued need for public transit. Another important finding was that there was no significant difference between constituents' responses based on location, such as geography or proximity to services. It

³⁷ Gord MacDonald and John Keith. TROUT Report to Municipalities 2010-12: Public Transportation in North Hastings and Highlands East Municipalities. Oct. 2012, p. 54.

³⁸ Interview with John Keith, Manager of Transportation Services, and Gord MacDonald, Executive Director, Community Care North Hastings, May 1, 2014.

³⁹ Gord MacDonald and John Keith. TROUT Report to Municipalities 2010-12: Public Transportation in North Hastings and Highlands East Municipalities. Oct. 2012.

⁴⁰ Sustainable Bancroft: An Integrated Community Sustainability Plan (2011): www.town.bancroft.on.ca/images/Sustainable/bancroft20icsp20final20may_10_2011.pdf

⁴¹ John Keith, Manager of Transportation Services. Trout Public Transit Contribution to Local Sustainability. Blog: <http://catchthetrout.ca/trout-public-transit-contribution-to-local-sustainability/>. Accessed April 28, 2014.

is hoped that these findings will help to inform future decisions about the transit service made by political leaders in each of the municipalities.⁴²

More recently, a group called Advocates for Rural Public Transportation has formed and is made up of supportive municipal councillors as well as others locally who are passionate about the TROUT. This group plans to go to all eight of the municipal councils in the area to discuss the transit system in terms of stimulating the local economy. They see public transit as an economic driver that helps to create employment. It has been shown to improve independence and mobility for individuals accessing educational opportunities, jobs, recreation, health and social services and other activities. A further benefit is that it is open to all, including those most vulnerable, enabling them to live, work, play and spend their money within the community.⁴³

E. Future Considerations

The dispersed, low-density population in this region makes a single fixed route less effective, and a dial-in service more costly. Continuing to provide an integrated conventional and specialized service appears to be the most cost-effective way of delivering public transit to the local population. Although it is not always an easy process to provide their 'blended flex service', the TROUT makes it work as well as they can.⁴⁴

Given the growing number of seniors residing in the area, compounded by an aging demographic overall, the



need for affordable, convenient public transit is likely to continue to grow.⁴⁵ As the TROUT develops and evolves, additions and modifications to existing fixed bus stop routes will be necessary to provide more efficient and effective public transit service.⁴⁶ Yet, if increased support does not come from the local municipalities, it is likely that they will have to discontinue service on some days (e.g., the Monday service within Bancroft). To support the service levels provided to date, the TROUT needs to raise an additional \$100,000 per year. The plan is therefore to put more energy into offering chartered trips. However this is less about public transit and more about revenue generation.⁴⁷

⁴² Gord MacDonald and John Keith. TROUT Report to Municipalities 2010-12: Public Transportation in North Hastings and Highlands East Municipalities. Oct. 2012, p. 4, 44, 45.

⁴³ Interview with John Keith, Manager of Transportation Services, and Gord MacDonald, Executive Director, Community Care North Hastings, May 1, 2014; and Gord MacDonald and John Keith. TROUT Report to Municipalities 2010-12: Public Transportation in North Hastings and Highlands East Municipalities. Oct. 2012, p. 52.

⁴⁴ John Keith presentation at Bancroft Rural Transportation Summit, November 15, 2013; and Gord MacDonald and John Keith. TROUT Report to Municipalities 2010-12: Public Transportation in North Hastings and Highlands East Municipalities. Oct. 2012, p. 52.

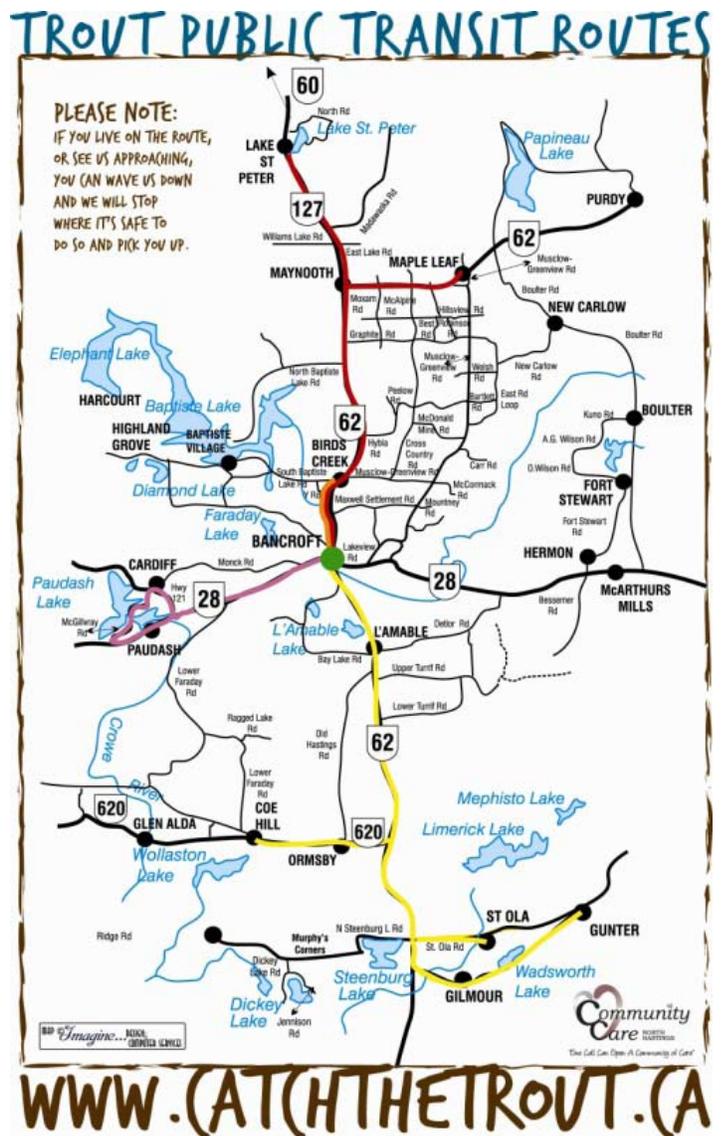
⁴⁵ Gord MacDonald and John Keith. TROUT Report to Municipalities 2010-12: Public Transportation in North Hastings and Highlands East Municipalities. Oct. 2012, p. 32.

⁴⁶ Catch the TROUT website: <http://catchthetrout.ca/category/media/>. Accessed April 28, 2014.

⁴⁷ Interview with John Keith, Manager of Transportation Services, and Gord MacDonald, Executive Director, Community Care North Hastings, May 1, 2014.

Operators of the TROUT would like to see the current organizational structure evolve so that a local Transit Commission would develop to assist in overseeing operations and undertake greater responsibility for the service. This structure would allow for greater input from municipal councils and other vested parties, such as the Chamber of Commerce and individual riders. The model could also enhance the accountability of the municipal councils, and allow for greater ownership of the public transit service from a broader community base. In addition, the model would be better positioned for sustainability because municipal participation and investment would be enhanced through co-ownership.⁴⁸

Gord MacDonald, the current Executive Director of Community Care North Hastings, believes that a Transit Commission “is the way to go so as to provide a long-term sustainable transportation service locally.” He also wonders why, in rural communities, “We all pay for roads, for policing and for schools, but not for public transit.” He sees this issue as one that goes beyond the Bancroft area and being bigger than just the TROUT, and thinks that the province should consider providing assistance to motivate municipalities. For example, incentives could be provided to small, rural communities via a model that would match every dollar from a municipality with one from the province.⁴⁹



⁴⁸ Gord MacDonald and John Keith. TROUT Report to Municipalities 2010-12: Public Transportation in North Hastings and Highlands East Municipalities. Oct. 2012, p. 35.

⁴⁹ Gord MacDonald. Executive Director, Community Care North Hastings. quoted during interview, May 1, 2014.

SUMMARY OF CASE STUDY RESULTS

Ten rural transportation programs were studied to answer the question: *“How can an effective, sustainable transportation system be created to serve a rural community?”* In developing the case studies, we increased our understanding of the issues faced by rural communities, the benefits of developing rural transportation services, both for individuals and for the community, and discovered how different circumstances led to different types of programs being developed. We traced the development process of the programs, from the initial formation of committees, partnerships and pilot projects in the early stages, to the establishment of stable transportation services. We also learned about the various issues and challenges that transportation program managers are dealing with as they strive to operate sustainable services that meet residents’ needs. While there were many differences among the programs, a comparative review of the case studies revealed some common themes.

All of the programs recognize the importance of providing transportation to individuals with a lack of access and/or limited mobility to help them meet their economic, social and health needs. They were also all created to help provide better linkages among the communities within a municipality, county or region, by linking communities to each other or connecting rural communities to larger urban areas.

Several of the programs received funding to conduct research or feasibility studies prior to establishing their initiatives. This allowed them to draw on information specific to their regions and to develop services that were appropriate to their individual circumstances. Quite a few of the programs were initially run as pilot initiatives. In some cases, initial attempts to start a transportation service failed before success was finally attained.

Most of the transportation initiatives also had some form of multi-sector community engagement process that informed the planning and development of the program.

This helped to ensure that the programs met the needs of their target populations and provided a forum for feedback in the early stages of development.

Collaboration seems to have been an integral component for some of the initiatives that were studied, especially for those that coordinate their services with those of other organizations. This not only offered greater efficiencies for the transportation providers but also better met the needs of riders. Some also explicitly acknowledged the importance of informal support systems in terms of fully meeting local transportation needs. A couple of the programs measured eligibility for service based on whether an individual had access to other forms of transportation, such as being able to get a ride from family members or friends.

Key informants for the case studies noted that, while collaborations are very important to emerging transportation services, it also takes time to foster and establish them, and that there is a need for more information about and assistance with developing these integral relationships. They found that external consultations and funding were helpful to make collaboration happen more quickly and effectively. It was also beneficial if the collaborating parties had previously worked together and had a history of cooperation.

All of the case studies received some form of financial support from municipal and/or provincial sources, demonstrating the importance of these contributions to their success. Additionally, riders on all of the transportation services had identified the positive impact that the service had had with respect to improving their quality of life in terms of economic, social and/or health aspects.

A summary of the results of the case studies is given below, using the main categories found in the individual case study reports as a framework.

1. Purpose

All of the rural transportation programs in the study aim to provide affordable and accessible transportation for rural residents to access appointments, meetings, work, education and training, shopping, social opportunities and/or recreation. In all cases, the services are being used for the same reasons that the programs were initially created. In most cases, transportation is also being accessed for purposes beyond those that were originally anticipated. For example, the operators of the Corridor 11 Bus in Muskoka and Simcoe counties expected that riders would mainly travel south to the larger and more urban areas. However, individuals are also travelling north and in between to some of the smaller communities.

For all of the transportation programs, most of the riders use the service to attend health and social services appointments. Secondary purposes are for recreation, socializing or shopping, followed by employment, education or training. People occasionally use the services to connect to other transportation providers such as GO Transit, VIA Rail and public transit systems in nearby urban centres.

2. Community Context

The communities in which the transportation programs were established vary in both size and demographics, but all serve rural communities, i.e. communities with populations of fewer than 20,000. Comparing population figures from the 2006 and 2011 censuses, almost all of the communities served by the case study programs are experiencing economic and population growth. Yet, many health and social services, educational services and employment opportunities are only or predominately available in larger, adjacent urban areas.

Some of the transportation programs are located in close proximity to larger urban areas and therefore feed into other forms of transportation within those centres, such as regional train and bus systems. For instance, Community Care Northumberland's Specialized Transportation

Program has an agreement with Cobourg Transit that riders can transfer from Community Care's transportation service to Cobourg's without having to pay another fare.

3. Length of Operation

Most of the programs are fairly recent innovations. Six of them have been in operation for five years or fewer. Two of the programs are between five and ten years old, and two others have been in existence for more than ten years. The longest running operation is Saugeen Mobility and Regional Transit (SMART), which started in 1977 as the Bruce, Grey and Huron Disability Transportation Corporation. SMART has a long history of providing transportation services to residents with mental and physical challenges, but underwent a restructuring and name change in 2009 that led to a greater emphasis on mobility versus disability.

4. Organizational Model

Another component of the "Accelerating Rural Transportation Solutions" project involved the creation of a user-friendly resource that allows transportation service providers to assess and identify opportunities to collaborate and develop a coordinated transportation model. *Towards Coordinated Rural Transportation: A Resource Document*¹ describes eight different types of transportation providers (pp. 14-19). All of the programs covered within these ten case studies are Conventional Municipal and Specialized Transit, and/or Community Care and Social Service Agency operated services.

Four of the transportation programs are municipally owned with the operation of the service provided under contract by a private transportation provider. Three are owned and operated by non-profit organizations. One is a community collaboration, and another is owned and operated by the municipality itself. The final one is a registered charity and government not-for-profit organization (GNPO). SMART is owned by the participating municipal partners and is governed under the terms of the Partnership Agreement signed by each municipality.

¹ Towards Coordinated Rural Transportation: A Resource Document. Prepared by Dennis Kar, Dillon Consulting, for the Rural Ontario Institute. 2014; p. 14-19: <http://ruralontarioinstitute.ca/file.aspx?id=b5980041-d1ce-4618-b742-1d62c39208f1>.

In most cases, day-to-day operations are supervised by a manager or coordinator with the administration and financial aspects being overseen by a board or committee. In some cases, an advisory group assists with community outreach and planning.

In all cases, the transportation programs employ both paid coordination staff and paid drivers with professional training. Three programs use a mixed model with both paid and volunteer drivers in order to meet the demand for their services within budget constraints.

5. Collaboration

The development of most of the rural transportation programs studied involved community collaboration to varying degrees, with those operated solely by individual municipalities requiring the least. In some of the upper tier municipalities, the program involves a partnership with the constituent lower tier municipalities. For example, Community Care Northumberland's Specialized Rural Transportation Program involves partnerships with three municipalities within the County of Northumberland. These municipalities contribute funds to the service from their own municipal budgets as well as from the provincial gas tax program.

Another example of collaboration is the Collingwood-Wasaga Beach Link, which was started in 2012 as a pilot partnership between the municipalities of Collingwood and Wasaga Beach with support from the County of Simcoe. The Collingwood-Blue Mountains Link was also launched in November of 2013 as a pilot service between two municipalities. However, this pilot was funded through a public-private partnership among The Towns of Blue Mountains and Collingwood, as well as Blue Mountain Resorts Limited and the Blue Mountain Village Association.

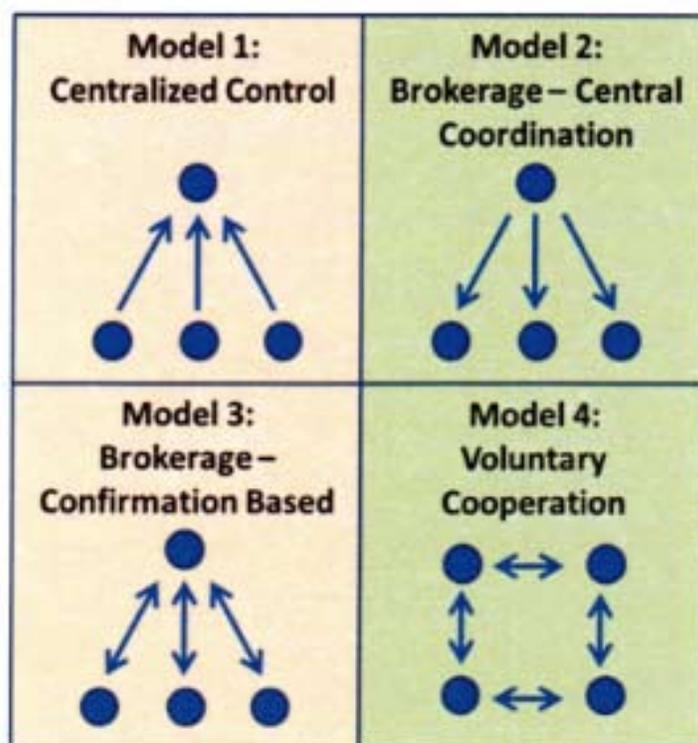
6. Coordination Model

In *Towards Coordinated Rural Transportation: A Resource Document*, Dillon Consulting defined "coordinated transportation" as:

*"A process in which two or more organizations interact to jointly accomplish their transportation objectives through shared responsibility to improve resource management applied to achieve greater cost-effectiveness in service delivery."*²

Dillon Consulting proposed four strategic coordination models that are commonly found in rural communities. Each model provides a different degree of coordination, from a more centralized framework to a more autonomous framework. EasyRide is an example of *Model 2: Brokerage-Central Coordination*, as the transportation services of five agencies within Huron and Perth agreed to develop a central dispatch coordination system operated by One Care Home & Community Support Services.

In some programs, there was a mix of models. For example, Ride Norfolk operates a fixed route bus service that serves seven communities, using a Centralized Control model



² Towards Coordinated Rural Transportation: A Resource Document. Prepared by Dennis Kar, Dillon Consulting, for the Rural Ontario Institute. 2014. p.7: <http://ruralontarioinstitute.ca/file.aspx?id=b5980041-d1ce-4618-b742-1d62c39208f>.

in which one organization manages and operates the transportation service. Ride Norfolk is currently working with four agencies that provide transportation services to their clients to develop a collaborative, integrated, on-demand transportation service. The plan is for the Ride Norfolk Public Transportation Coordination Office to act as a dispatch centre to provide information about the service and manage scheduling. Their scheduling software, designed specifically for the transportation sector, will be used by all the participating agencies to schedule their vehicles. Each transportation provider will be able to see the schedules so they can coordinate the services. This software program allows for an efficient application of Model 3: Brokerage-Confirmation Based, in that any of the providers will be able to book rides for people during times that drivers are available.

7. Revenue and Funding Sources

All of the transportation providers charge a fee for the use of their services. In some cases the fees are set fares based on rider location, age and/or distance travelled. In one case the fee was also determined based on an individual riders' ability to pay.

Each of the ten case studies received funding, either directly or indirectly, from one or more municipal levels of government. All but one of the programs also received assistance from the provincial gas tax fund. In Ontario, the provincial gas tax fund is a tax of two cents per litre that is applied to fuel purchases made at the pump. These funds are then distributed to municipalities within the province that are providing public transportation. As Brad Smith of Ride Norfolk noted in his presentation at the Rural Transportation Forum in Orangeville, Ontario, on June 20, 2014, "Supporting rural transportation initiatives enables fuel tax dollars to stay within local municipalities."

The Dial a Ride Rural Route Transit program, as a pilot project that is one component of the overall transit services provided by the City of Kawartha Lakes, is completely funded by funds from the provincial gas tax program. Operation of the service is contracted with Mole Ground Transportation, with inquiries and bookings managed by the Public Works Transportation Supervisor, employed by the City of Kawartha Lakes.

In a few cases, the county or another level of regional government also provided funding to support the program at some stage of development. For six of the case studies, grants were obtained from Ontario Trillium Foundation or the United Way, and three of the ten received financial assistance from their Local Health Integration Network (LHIN). Two of the transportation providers also conducted community fundraising campaigns to support their programs. For example, The Rural Overland Utility Transit (TROUT) hires out their buses for occasional private charter purposes to defray the costs of their public transportation program. In addition to providing another type of transportation service, it lowers greenhouse gas emissions by reducing car use and decreases the likelihood that people will "drink and drive" at events such as weddings.

8. Routes and Schedules

Six of the transportation services have fixed routes, with four of those providing a certain level of individualized service as well. The other four programs offer specialized door-to-door service. The fixed route services were designed to meet the needs of the general public and have relatively consistent schedules. They are organized either in a "spoke & hub" pattern (i.e., roads travelled feed into a larger town or city centre), such as Ride Norfolk, Deseronto Transit, TROUT and the City of Kawartha Lakes' Dial a Ride programs, or along a 'linear corridor' (i.e., one main road connecting towns or cities), as is the case with the Corridor 11 Bus and the two Collingwood Link systems. Those programs that explicitly aimed to meet the needs of people with physical and/or mental challenges are organized as a door-to-door, on-demand service model.

Most of the programs operate from Monday to Friday and during standard working hours (e.g., 8:00 a.m. – 6:00 p.m.). Some of the services also operate early in the morning, late in the evening and/or on weekends to meet the specific needs of their riders.

9. Riders and Eligibility Criteria

Most of the programs do not have eligibility criteria and operate to service the general public. In some of these cases, riders are still required to register to ensure that their needs can be met. Three of the programs have eligibility criteria that are aligned with their particular mandates, although it may be quite loosely defined. For example, at least one program described an eligibility criterion as “anyone in need.”

All of the transportation providers serve seniors and persons with disabilities. Most also serve people with low incomes, youth and students. Many of the programs also serve children and families. For instance, Lanark Transportation Association provides access to childcare programs and receives funding in order to help meet this need.

10. Impacts

a) Economic

Most of the key informants considered public transit to be an economic driver for their communities, as it increases access to employment opportunities, promotes local retail spending, offers a more affordable alternative for getting to work and provides jobs for those operating the system. Both Deseronto Transit and the Collingwood-Blue Mountains Link initiatives were specifically created to provide better access to employment, and they have both proven to be successful in doing this.

The Corridor 11 Bus also aims to provide a public transportation option for Ontario Works (OW) and Ontario Disability Support Program (ODSP) clients in order to access employment and training opportunities, as well as to meet with their case workers. This has led to a substantial reduction in social service costs for the District Municipality of Muskoka’s Community Services department as OW and ODSP clients can now use public transit rather than relying solely on taxi services to get around.

Three of the services have given local students a viable transportation option as well, making it affordable to travel to both secondary and post-secondary institutions.

Those initiatives that have had the opportunity to survey and/or receive feedback from riders have numerous stories from people with low incomes of the impact that the provision of an affordable transportation option has had on their lives. Many reported that they would not have been able to obtain a job in the first place and/or get to their place of employment without it. Others spoke about being able to access more affordable food options given that they could now get to a larger grocery store versus having to do their shopping at a convenience store.

b) Social

Significant social impacts have been felt as a result of the introduction of rural transportation services. All of the case study informants reported that riders use their systems in order to access social services, visit family members and friends, conduct shopping, engage in recreation, leisure and entertainment activities and/or connect to other forms of transportation. Some riders were also able to get to child and adult day care programs, which would not be an option without the existence of the transportation initiative. There were also stories about the impact of being able to access childcare for not only social, but also health and economic reasons, such as employment.

Evidence exists of the impact of having access to the above noted activities on individuals, families and communities as a whole. For instance, in their *Cost-Benefit Analysis of Rural and Small Urban Transit* report, the US National Center for Transit Research³ references several studies that measured the economic, social, health and environmental impacts of public transit. Within the Deseronto case study, a survey of riders established that 94% of respondents felt that the public transportation service had improved their access to essential services. Riders of the Ride Norfolk bus reported that riding the bus has had a major impact on their social lives as it provides opportunities for social interaction. The bus routes take into account people’s

³ Cost-Benefit Analysis of Rural and Small Urban Transit. Ranjit Godavarthy, Jeremy Mattson and Elvis Ndembe. North Dakota State University Upper Great Plains Transportation Institute Small Urban and Rural Transit Center. Prepared for the U.S. Department of Transportation. July 2014: <http://www.nctr.usf.edu/wp-content/uploads/2014/07/77060-NCTR-NDSU03.pdf>

desire to go on social outings, with stops at the farmers market, swimming pool, provincial park and, in the summer, the beach. According to SMART Manager, Roger Cook, the rides provided by that service are “a vital lifeline” for social outings and a sense of personal independence.

c) Health

According to the American Public Health Association, *“Research increasingly indicates that current transportation investments can have a profound impact on public health for the poor, the elderly, people with disabilities and other vulnerable populations... The public health community is strongly supportive of transportation investments that support the growth and establishment of health and equity in all communities...”*⁴

All of the programs provide transportation to health appointments. While the direct impact on health status has not been assessed, being able to attend appointments is critical to preventing health problems, managing health conditions effectively and avoiding relapses following treatment. It has been demonstrated that those with access to transportation are more likely to attend health appointments than those without access, and that missing a trip for routine care or preventive services can often result in a medical trip that is more costly than the trip that was missed, including emergency transfer and hospitalization.⁵

In addition, being able to access social and recreational programs not only offers increased opportunities for physical activity but also for social interaction, further reducing the likelihood of social isolation and negative mental health. Research shows that people who have increased mobility are more likely to be able to live independent, healthier lives as a result. The value of the increased self-esteem that is generated from being able to move around the community freely may not

be easily measured, but it has great meaning for many people. The TROUT case study refers to the Town of Bancroft’s *Sustainable Bancroft: An Integrated Community Sustainability Plan*⁶, which states that a sustainable Bancroft is “about sharing a common purpose: sustaining a community where people thrive and enjoy a good quality of life,” contributing to growth, health, and well-being. And specifically, it identifies transportation as “a core component of a sustainable community.”

d) Environmental

The environmental impacts are the most difficult to determine as none of the programs have measured indicators such as greenhouse gas emissions. As mentioned, several of the initiatives have not had the resources or time to evaluate the impacts of their services as a whole; those that had conducted evaluations chose to focus on the social, health and economic impacts, as the environmental impacts are much harder to quantify.

However, prior research has demonstrated the environmental impacts of providing public transit in small communities, and some of this evidence could be extrapolated to the programs covered in the case studies. Also, a couple of the initiatives have been able to employ bio-diesel buses and accommodate bicycles. Such buses make use of a waste product that would otherwise need to be disposed of and one which also has low carbon emissions. Those initiatives that provide options for carrying bicycles also enable riders to travel greater distances, give them more flexibility in terms of their schedules and allow them to engage in physical activity.

⁴ Public Health and Equity Principles for Transportation – American Public Health Association (APHA): http://www.apha.org/advocacy/priorities/issues/transportation/transport_principles.htm

⁵ Cost-Benefit Analysis of Rural and Small Urban Transit. July 2014.

⁶ Sustainable Bancroft: An Integrated Community Sustainability Plan. Prepared by Grant Consulting. May 2011: http://www.town.bancroft.on.ca/images/Sustainable/bancroft20icsp20final20may_10_2011.pdf

CONCLUSIONS

The in-depth study of ten Ontario rural transportation programs has led us to conclude that significant benefits accrue to communities that invest in transportation services. Public transit systems support the local economy by helping people get to work and to stores to shop. The ability to access education and training programs can drastically improve people's employment prospects, and decrease the likelihood that young people will need to relocate to larger urban centres. Social and health benefits are also created as people are able to access needed services, attend recreation and leisure activities, and maintain connections with family and friends. Transportation programs further allow for increased independence and mobility for non-drivers, reduce air pollution and increase the vibrancy of local communities.

Yet, there are also significant challenges involved in developing and maintaining rural transportation programs compared to urban ones. In areas with low traffic density and inexpensive parking, public transportation usually is not an attractive option to private vehicles for those that have the ability and the means to drive. Public transit systems in rural areas are often seen as expensive to operate and as serving a small portion of the population, so they sometimes are not supported by those taxpayers and politicians who have access to private vehicle use.

There are several challenges in the development of a rural public transit service. A "car-first" culture can move to alternative forms of transportation with education and awareness but this is often a long term process. Public transit is not just about moving people around and "bottom-line" finances – it's also about social connection to community and about being environmentally astute.

Gord MacDonald, Community Care North Hastings and John Keith, T.R.O.U.T. The Rural Overland Utility Transit

T.R.O.U.T Report to Municipalities 2010 -2012. October 26, 2012; p.4

Some of the rural transportation programs also have challenges when seeking financial support because it is difficult to justify a transportation system that carries a small number of passengers over a large distance. Funding sources are often limited and fragmented, with many programs having to weave together funding from several sources. Like most not-for-profit operations, several of the program managers have concerns about their long term financial stability.

However, expenses must be measured alongside the benefits and cost savings provided to individuals and communities as a whole. Decision-makers within municipalities need to be made aware of the full range of pros and cons of developing a rural transportation initiative. A strong business case using the "triple bottom line", which considers a combination of economic, social/health and environmental outcomes, is essential to garner public support for local transit development.

There is no prescription for developing a successful rural transportation program. Each community has a unique history, demographic characteristics, resource base and political dynamics. While several study participants indicated that being able to review research documents and connect with others working on rural transportation issues was helpful, ultimately each community needs to engage a range of local stakeholders and develop their own plans. Collaboration with local business associations, health organizations, educational institutions, and social and recreation service providers has been invaluable to many of the programs.

While the road to providing accessible, equitable and responsive transportation services for Ontario rural communities can be long and hard, these ten case studies provide an optimistic perspective. New models of collaborative rural transportation solutions are continuing to emerge and evolve, and more and more community representatives are willing to engage in cross-sector dialogue that will continue to strengthen and accelerate the development of solutions to rural transportation issues.

ADDITIONAL RESOURCES

Towards Coordinated Rural Transportation: A Resource Document. Prepared for the Rural Ontario Institute by Dillon Consulting, August 2014. <http://www.ruralontarioinstitute.ca/resources-reports>

Accelerating Rural Transportation Solutions – a three-part webinar series by HCLink, the Ontario Healthy Communities Coalition and the Rural Ontario Institute. February and March 2014. Recordings of the webinars, slides and other related documents are available at: http://www.ohcc-ccso.ca/en/rural_transportation_webinars

Cost-Benefit Analysis of Rural and Small Urban Transit. Prepared for the U.S. Department of Transportation by Ranjit Godavarthy, Jeremy Mattson and Elvis Ndembe. North Dakota State University, Upper Great Plains Transportation Institute, Small Urban and Rural Transit Center. July 2014.
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Public Health and Equity Principles for Transportation. American Public Health Association.
<http://www.apha.org/topics-and-issues/transportation-issues-from-the-public-health-perspective>

APPENDIX A: KEY INFORMANT INTERVIEW QUESTIONS

A. Local Transportation Context

The first set of questions is designed to help us understand the local transportation context.

- Can you please provide a brief overview of the demand for improved/increased transportation in your area?
 - What were some of the key issues that led to the establishment of the initiative?
- Can you please briefly describe what the transportation supply situation was like prior to the establishment of the initiative?

B. Initiative Background

In this section, I would like to learn more about the history of the initiative itself.

- First, can you describe the local support for establishing a transportation initiative?
 - What were some of the local assets/opportunities you were able to capitalize on?
- Related to that, can you describe who the key partners or stakeholders were in the development process?
- Are you able to talk about funding for the initiative?
 - If yes, can you provide a brief overview of the initial funding sources, including any capital investments?
- Can you describe any issues/challenges that affected the early stages of the initiative?
 - Were there any legal and/or liability issues?

C. Current Operations

In this section, I would like to ask about the current operations of the initiative

- Are you able to discuss current operating costs and revenues for the initiative?
 - If so, please provide information about both operating costs and revenues, including:
 - taxes,
 - grants,
 - public/private donations
 - sponsorship
 - Donor support
- Is there any kind of partnership arrangement for the initiative?
 - If so, please indicate who the partners are and what kind of arrangement there are with those partners.
- Does this initiative address any issues of accessibility?
- Was any research conducted prior to the development of the initiative; e.g. feasibility, barriers, challenges?

D. Impacts

In this section, I would like to ask several questions about impacts of the initiative.

- First, has an evaluation or impact study been done?
- If no, ask more informal questions about the following:
- Has there been any research to look at the environmental impact (such as reduced vehicle emissions)?

- Has there been any research to look at the economic impact, including:
 - Cost-benefits of the program
 - Any employment and business activity related to the initiative
 - Impact on any property values
 - Impact on local taxes
 - Impacts on local economy in other ways

- Has there been any research to consider the social impacts, including:
 - Mobility and independence
 - Leisure activities
 - Socialization
 - Equity

- Finally, is there any information that speaks to the health impacts, including:
 - Mental health
 - Access to medical appointments
 - Active transportation

F. Future Considerations

In this last section, I would like to ask you about future plans for the program.

- First, can you discuss what the plans are for the initiative in the short-term? If yes, please tell me about them.

- What are factors affecting the future of the program, including:
 - changes in demographics
 - ridership/participation
 - partnerships?

- Are you anticipating any changes in costs and or revenues?

For more information or to download this report, please visit the
Ontario Healthy Communities Coalition Rural Transportation page:
<http://www.ohcc-ccso.ca/en/rural-transportation>

Published October 2014