



# TOWARDS COORDINATED TRANSPORTATION:

## A Resource Document

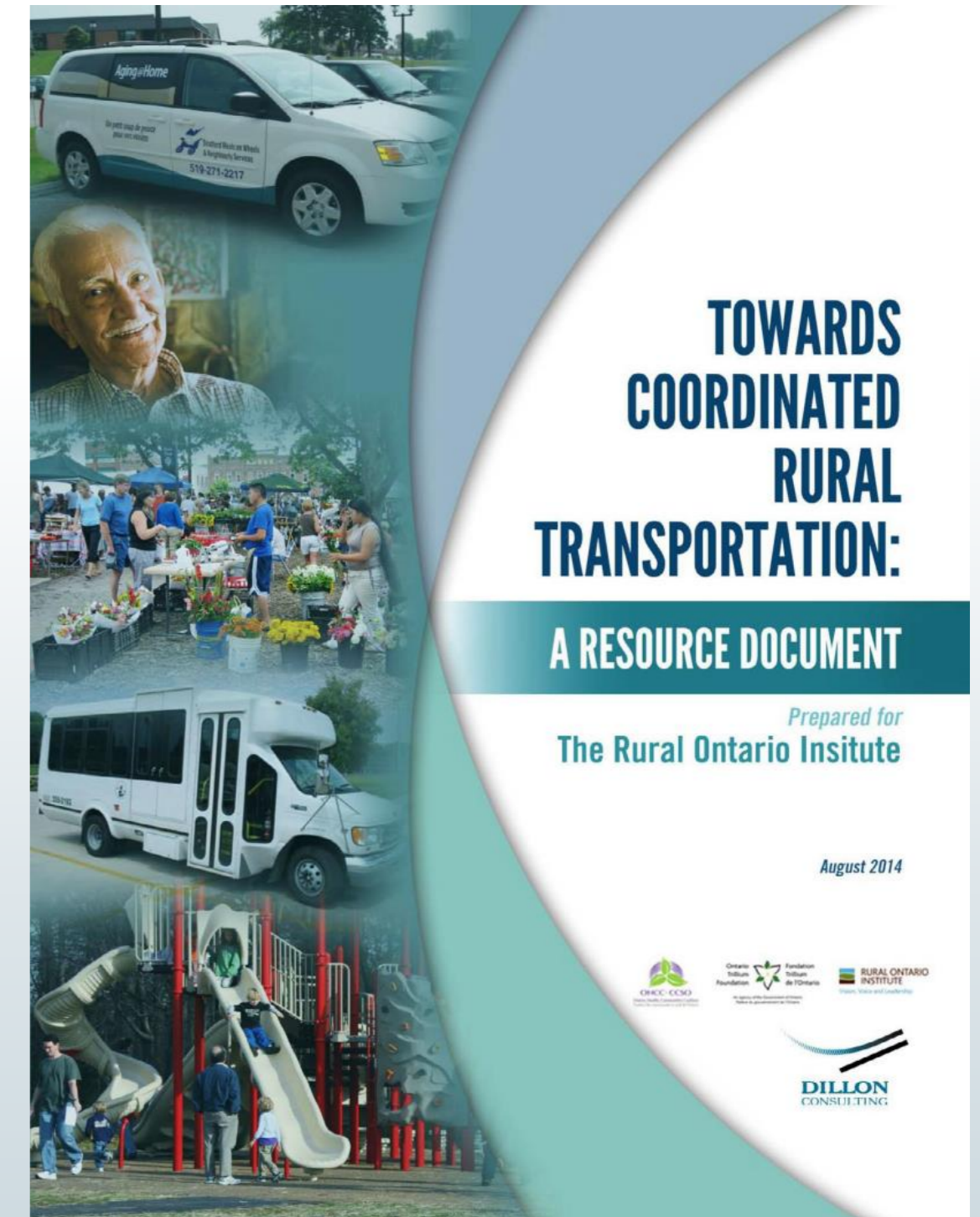
**HC Link Webinar**  
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# Study Purpose

- Illustrate different coordinated transportation models
- Outline challenges and potential solutions
- Develop a framework to identify and assess coordination opportunities
- Demonstrate the methodology on three regions
- Report Link:

<http://www.ruralontarioinstitute.ca/file.aspx?id=b5980041-d1ce-4618-b742-1d62c39208f1>



# What is Coordination?

- **When two or more organizations interact to jointly accomplish their transportation objectives**
  - Involves better resource management, in which improved organizational strategies are applied to achieve greater cost-effectiveness in service delivery
  - Involves shared responsibility, shared management, and shared funding
  - **Requires TRUST**



# Objectives of Coordination

- **Improve transportation system performance by:**
  - Stretching scarce resources through better resource management
  - Freeing local agency staff to do other work
  - Reducing client confusion over who to contact
  - Reducing duplication of efforts and services
  - Increasing potential for shared rides – which in turn will increase capacity
- **Reinvest savings to improve the level of service**

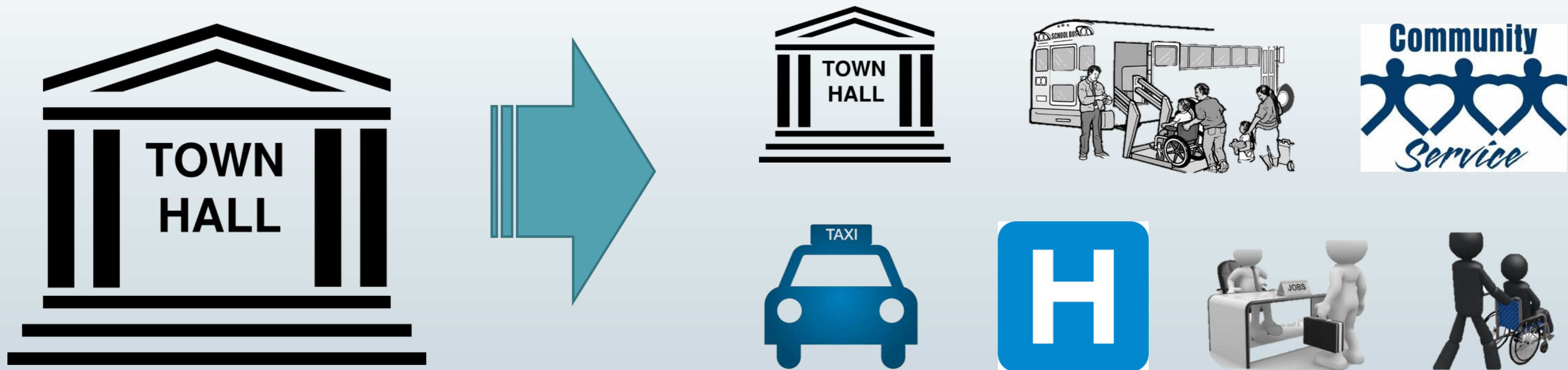
# Steps to Establish a Coordinated Transportation Framework



**Step 1**  
 Identify Two or  
 More Organizations  
 that Share a  
 Common Goal

# Step 1 - Partnership Process and Activities

- Identify two or more parties that are willing to work together to explore the potential of a coordinated framework



## Step 1

Identify Two or  
More Organizations  
that Share a  
Common Goal

# Step 1 - Partnership Process and Activities

- Work with agencies and funding partners to identify the potential to pool resources towards a common goal
- Identify a lead organization or champion
- Develop a vision for success, including goals and objectives
- Develop a partnership commitment (memorandum of understanding)
- Meet at least monthly, until partnership has been fully assessed



**Step 1**

Identify Two or  
More Organizations  
that Share a  
Common Goal

# Step 1 - Partnership Process and Activities

## It's All About Mobility

- Mobility to access opportunities
- Mobility to stay engaged in communities
- Mobility to improve quality of life



## Step 2

Inventory Existing  
Transportation  
Services and Key  
Stakeholders

# Step 2 - Inventory Process and Activities

- Develop an inventory of existing transportation providers and key stakeholders (web-search, online, mail or telephone surveys, follow-up questions)
- Understand resources, legislative requirements, funding sources, eligibility criteria, desire to participate in a partnership

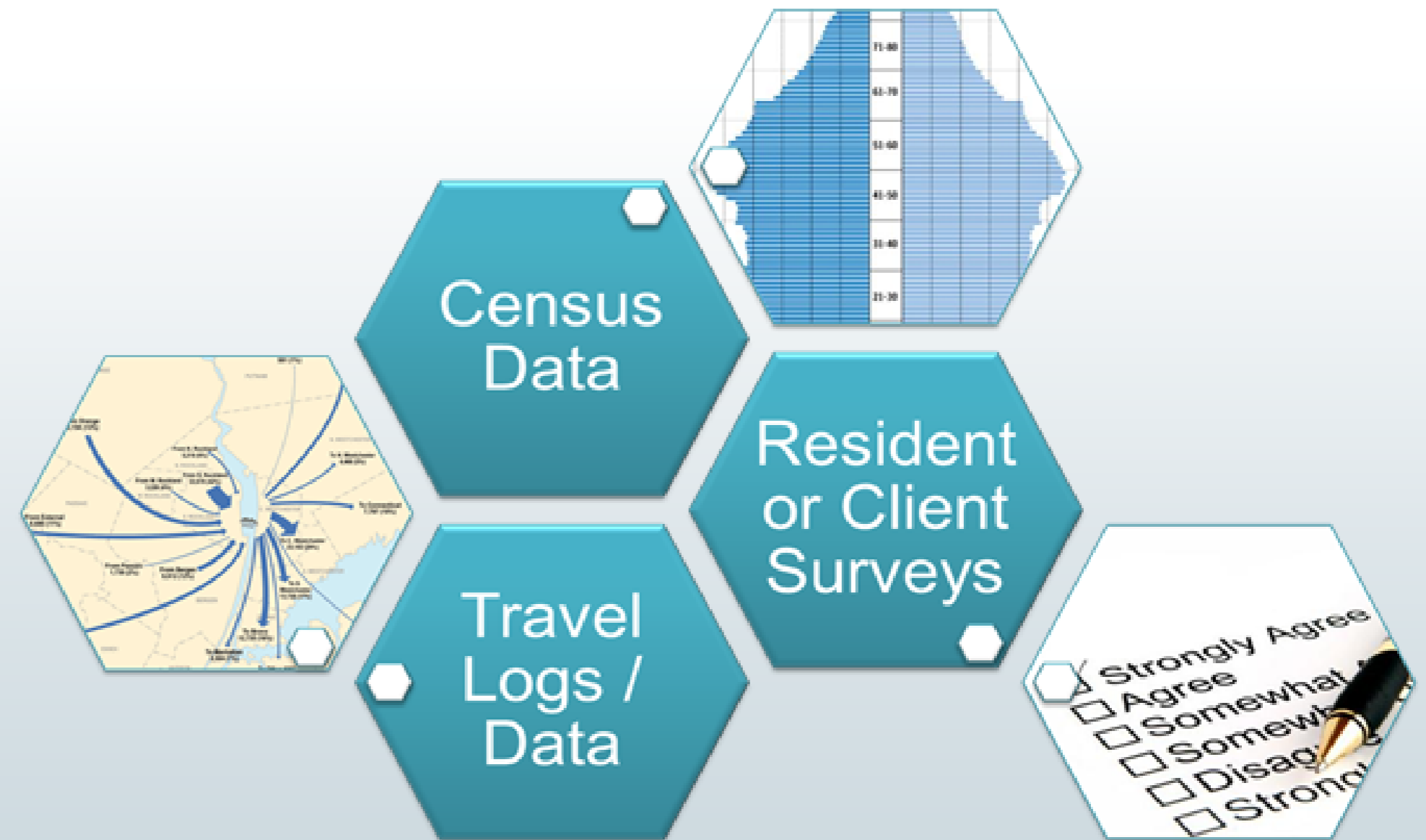


### Step 3

Identify Service Demand and Gaps / Implementation Issues and Opportunities

# Step 3 – Assess Demand & Gaps Demand Forecasting

- Assess potential for future travel demand and identify gaps in service
- Conduct a workshop with the stakeholders to work through each type of service need or gap identified

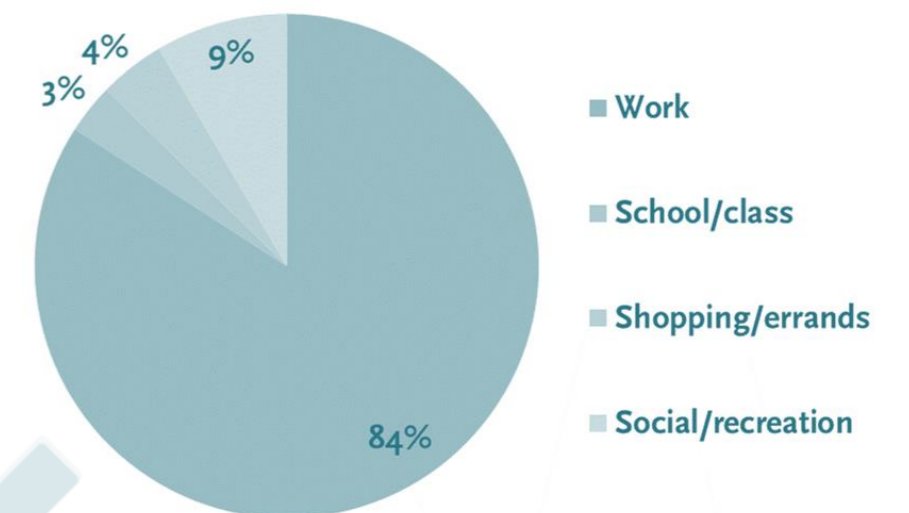


**Step 3**

Identify Service  
Demand and Gaps /  
Implementation Issues  
and Opportunities

# Step 3 – Assess Demand & Gaps Potential Gaps

- **Temporal availability**
- **Geographic availability**
- **Capacity issues**
- **Accessibility**
- **Eligibility**
- **Trip purpose**
- **Affordability**
- **Ease of understanding and navigation**



**Step 3**

Identify Service Demand and Gaps / Implementation Issues and Opportunities

# Step 3 – Assess Demand & Gaps Process and Activities

- Identify potential implementation issues and opportunities
- Determine potential areas where coordination may help to resolve the service gap versus areas where expansion of existing resources is required
- **EXAMPLE: YORK REGION TRANSIT**



**Step 3**

Identify Service Demand and Gaps / Implementation Issues and Opportunities

# Step 3 – Assess Demand & Gaps Implementation Issues

- 1. Mandates/Funding Constraints:** Funding tied to health trips (e.g. LHIN)
- 2. Driver Availability:** Not enough drivers to operate vehicles (use of volunteer drivers)
- 3. Limited Service Providers:** Resources already stretched
- 4. Policies, Procedures and Remuneration:** No consistency
- 5. Upfront Costs and Resources:** Challenge given limited funding
- 6. AODA Legislative Requirements:** Can be a challenge when involving other sectors



**Step 3**

Identify Service  
Demand and Gaps /  
Implementation Issues  
and Opportunities

# Step 3 – Assess Demand & Gaps Opportunities

- 1. Existing Coordination:** Build on existing partnerships
- 2. Expertise:** Take advantage of expertise offered by each partner (technology, scheduling, etc.)
- 3. New Funding Sources:** Can lead to other applicable funding sources (e.g. gas tax, Ontario Trillium Funding)
- 4. Underutilized Resource:** Make better use of underutilized resources
- 5. Efficiencies:** Increase shared rides by grouping different population groups previously delivered by separate agencies

## Step 4

Assess Different  
Coordination  
Models

# Step 4 – Model Selection Process and Activities

- Hold an evaluation session with representatives from each organization to discuss, evaluate and decide on the level of coordination desired
- Each partner should outline their desired level of independence within the coordinated framework
- Assess the advantages and disadvantages of each level of coordination
- Focus on one or two models that the group is comfortable with

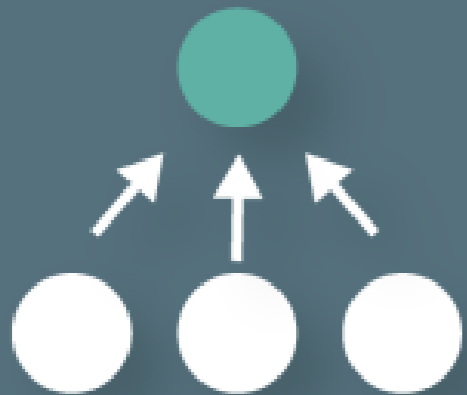


### Step 4

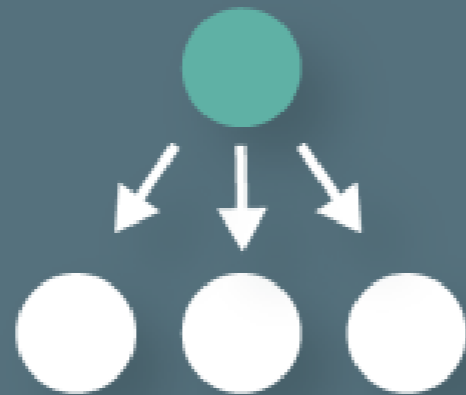
Assess Different  
Coordination  
Models

# Step 4 – Model Selection Models to Consider

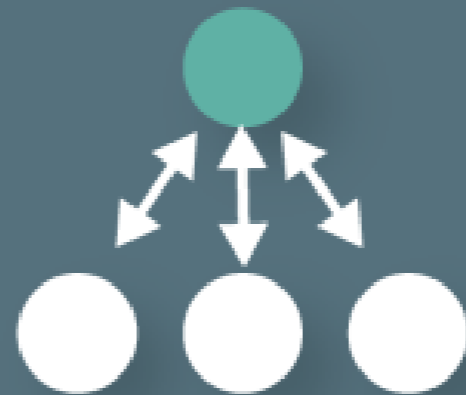
Model 1:  
Centralized  
Control



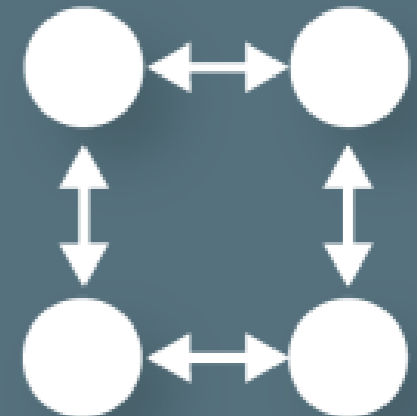
Model 2:  
Brokerage - Central  
Coordination



Model 3:  
Brokerage -  
Confirmation Based



Model 4:  
Voluntary Cooperation  
Model



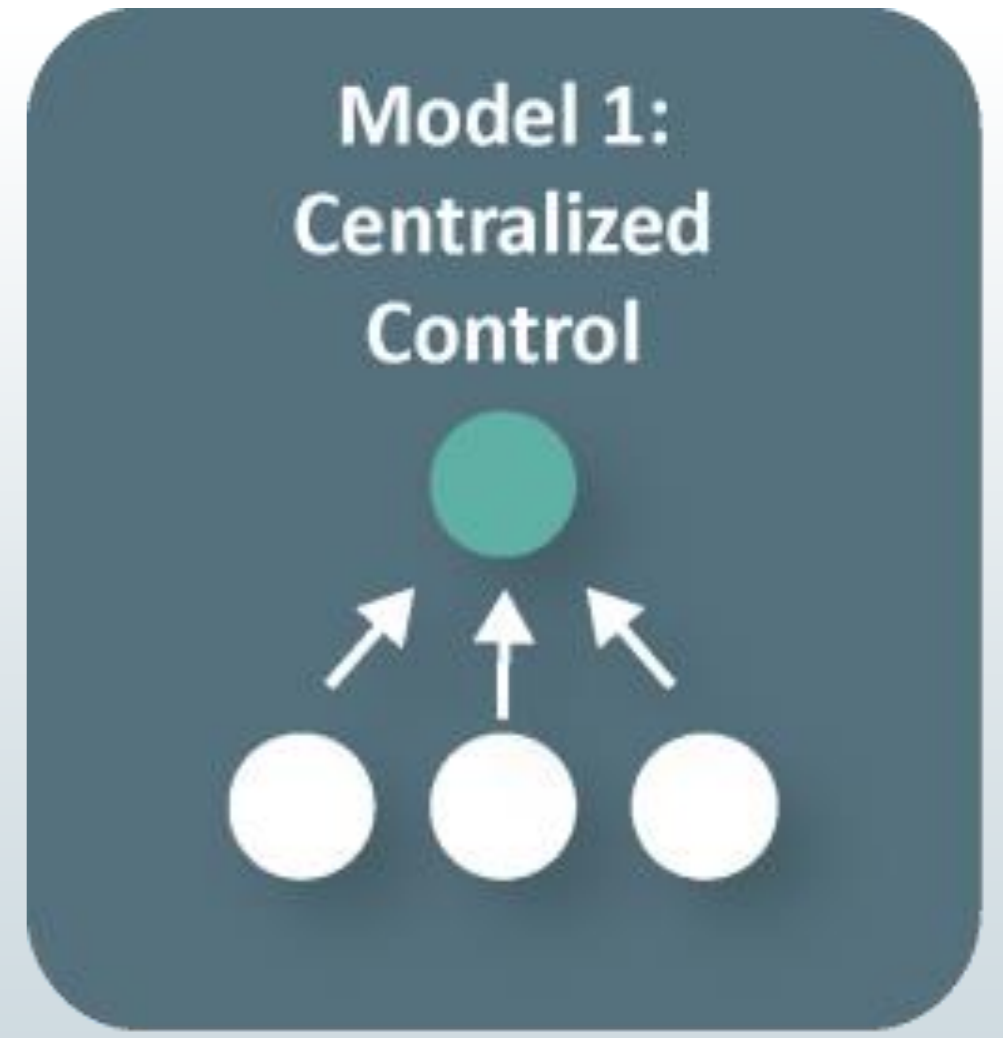


Step 4

Assess Different Coordination Models

# Step 4 – Model Selection Model 1

- One lead organization plans and operates all transportation services on behalf of the partnership
- Partner organizations participate by providing expertise through a steering committee and funding and/or resources
- “Consolidation” forms a variation of this model



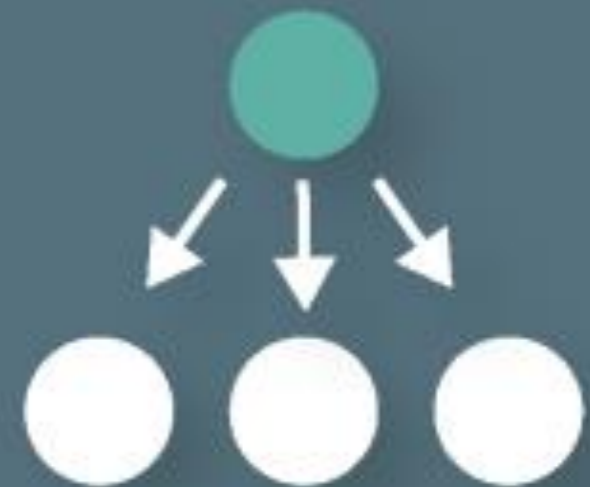
## Step 4

Assess Different  
Coordination  
Models

# Step 4 – Model Selection Model 2

- One lead organization plans and schedules all transportation services and trips
- Partner organizations retain ownership of their vehicles and resources
- Coordinated trips are made by the lead partner and delivered by each partner agency

### Model 2: Brokerage - Central Coordination



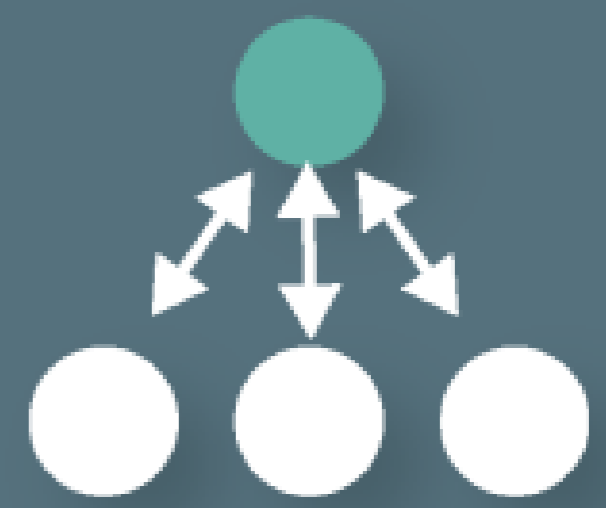
Step 4

Assess Different Coordination Models

# Step 4 – Model Selection Model 3

- One lead organization plans and schedules all transportation services but requires confirmation from partner organization before scheduling their vehicle for a coordinated trip
- Partner organizations retain ownership of their vehicles and resources, and are able to limit trips by clients of other agencies

Model 3:  
Brokerage -  
Confirmation Based

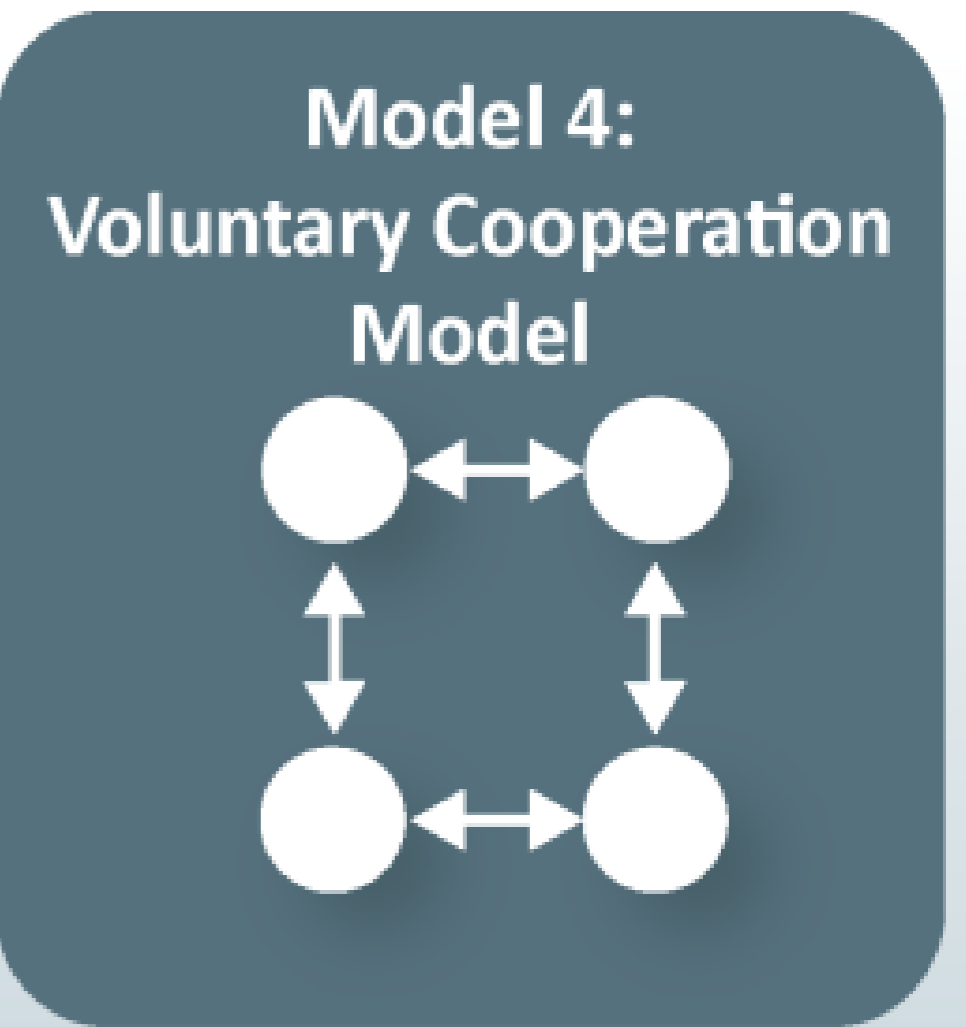


Step 4

Assess Different Coordination Models

# Step 4 – Model Selection Model 4

- All partner organizations retain ownership of vehicles and services, but work together to improve policies and processes
- Potentially provide a central transportation information service and cooperate on specific initiatives
- Each partner organization continues to operate independently but understands what others are doing



**Step 5**

Assess Applications  
for Coordination  
Against Potential  
Coordination  
Models

# Step 5 – Process and Procedures Process and Activities

- Discuss, evaluate and decide on the potential applications for coordination based on model chosen
- Assess each coordination opportunity based on specific criteria
- Identify issues that may arise for each potential coordination application
- Review the challenges of coordination and identify solutions and any implementation risks
- Identify the costs of coordination of services and compare to the costs of staying with the status quo (costs will not always decrease!)

**Step 5**  
Assess Applications  
for Coordination  
Against Potential  
Coordination  
Models

# Step 5 – Process and Procedures Applications for Coordination

Function	Model 1 Centralized Control	Model 2 Brokerage – Central Coordination	Model 3 Brokerage – Confirmation Based	Model 4 Voluntary Cooperation
Service Planning	1	1	2	N/A
Customer Service	1	1	2	2
Intake Process	1	2	2	N/A
Marketing / Awareness	1	1	2	3
Scheduling and Dispatch	1	1	2	N/A
Passenger Fares	1	1	2	3
Eligibility Criteria	1	2	3	3
Policies and Procedures	1	2	2	3
Vehicle Purchase	1	3	3	3
Vehicle Maintenance	1	3	3	3
Driver Training	1	3	3	3
Volunteer Recruitment	1	3	3	3

1 = Required;  
2 = Preferred;  
3 = Optional;  
N/A = Not Applicable

**Step 5**

Assess Applications  
for Coordination  
Against Potential  
Coordination  
Models

# Step 5 – Process and Procedures Sample Assessment Method

## Marketing / Awareness – Assessment Methodology

Steps in the Process	Comments
<p><b>1. Assess the visibility of the coordinated framework for existing and new clients/customers</b></p>	<p>If the partnership is back-end and is not visible to clients/customers (e.g. Model 4), a centralized brand is not required. If clients/customers have access to vehicles from multiple agencies, a centralized brand is preferred.</p>
<p><b>2. Review existing marketing /communications budgets to determine potential to pool resources</b></p>	<p>Review how budgets are currently being spent. Assess whether there is a benefit to consolidate and better communicate the objectives of the transportation service.</p>
<p><b>3. Develop potential brand that reflects entire community and seek sponsorship opportunities</b></p>	<p>Having a recognizable community-wide brand may encourage various retailers, local businesses and service clubs to financially support the overall objectives of the partnership.</p>

## Step 6

Select a Preferred  
Coordination Model

# Step 6 - Implementation Process and Activities

- Select a model and formalize agreement with participating partners
- Confirm the mission statement and vision for the partnership
- Develop a service plan on how the structure will be organized and implemented
- Approach partners to secure funding
- Develop an action plan with deliverables and key milestones
- Establish a monitoring plan to measure results against goals
- Report back to funding agencies



## Step 6

Select a Preferred  
Coordination Model

# Step 6 - Implementation Secure Funding

- Critical to establishing a coordinated framework
- Federal Gas Tax available, but not dedicated to transit
- Federal Transit Infrastructure Fund (for existing transit systems)
- Provincial Gas Tax Funding can be leveraged through municipalities – Dedicated to transit services
- LHIN funding to support seniors and persons with disabilities – work with LHINs so funding does not restrict service to one population group
- Grants, Donations, In-Kind services/resources, passenger fares

## Step 6

Select a Preferred  
Coordination Model

# Step 6 - Implementation Monitor Performance

- Performance Measures are important to assess the outcome of the coordinated partnership
- Effective Performance Measures and Targets are...
  - Tied to goals and objectives
  - Challenging yet achievable
  - Quantifiable based on available resources
  - Explained as a ratio against another variable (e.g. rides per service hour)
- Monitoring Plan should start with baseline data and collected at regular intervals

# Potential Coordination Opportunities



**Step 5**

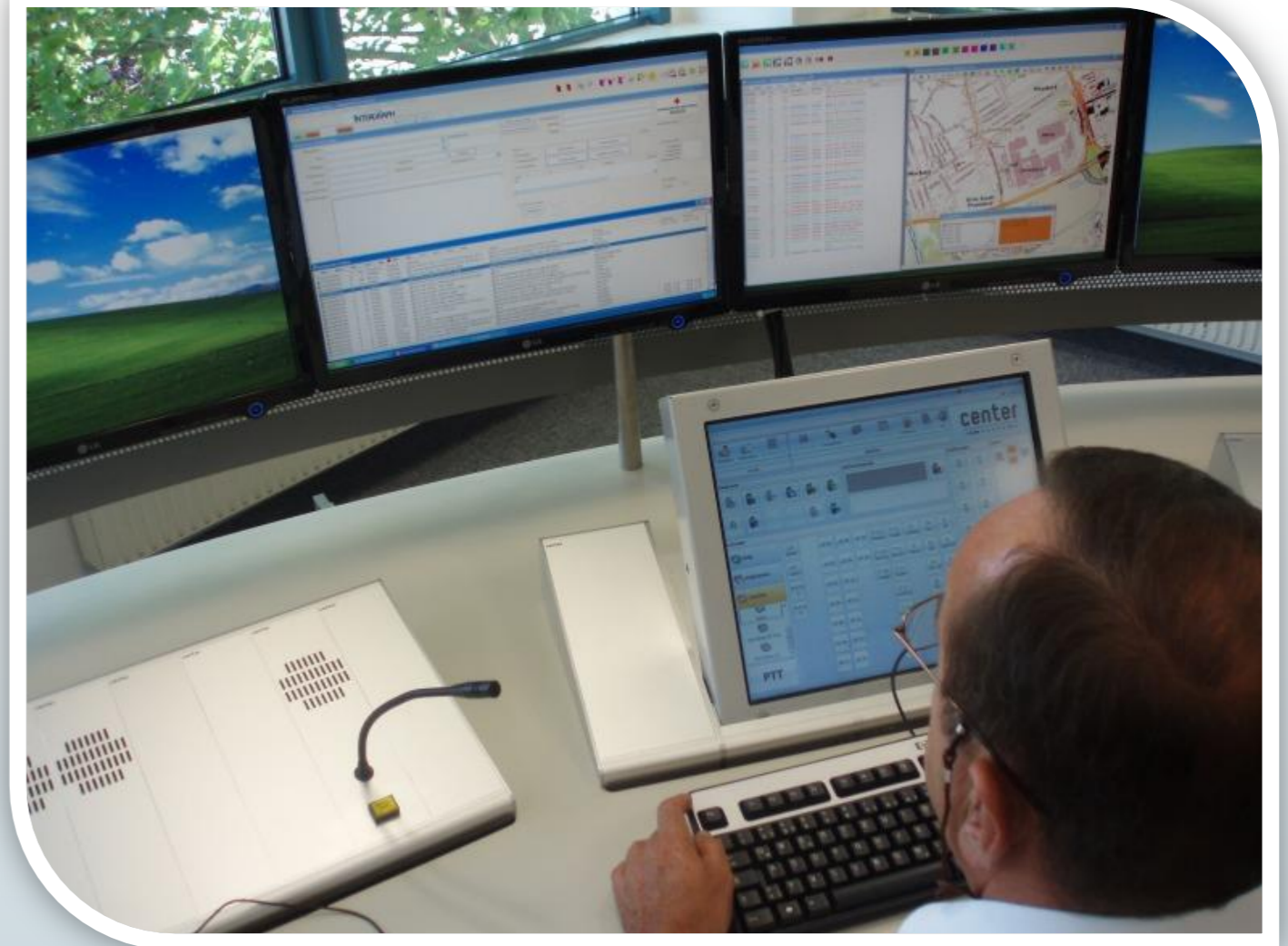
Assess Applications  
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Models

**Step 6**

Select a Preferred  
Coordination Model

# Centralized Scheduling / Dispatch Office

- Develop central office for booking, scheduling and dispatching trips
- Identify opportunities for shared rides between transportation providers
- May involve capital purchase of scheduling / dispatch software
- Software cost depends on vehicles and trips, however, inexpensive solutions on the market



**Step 5**

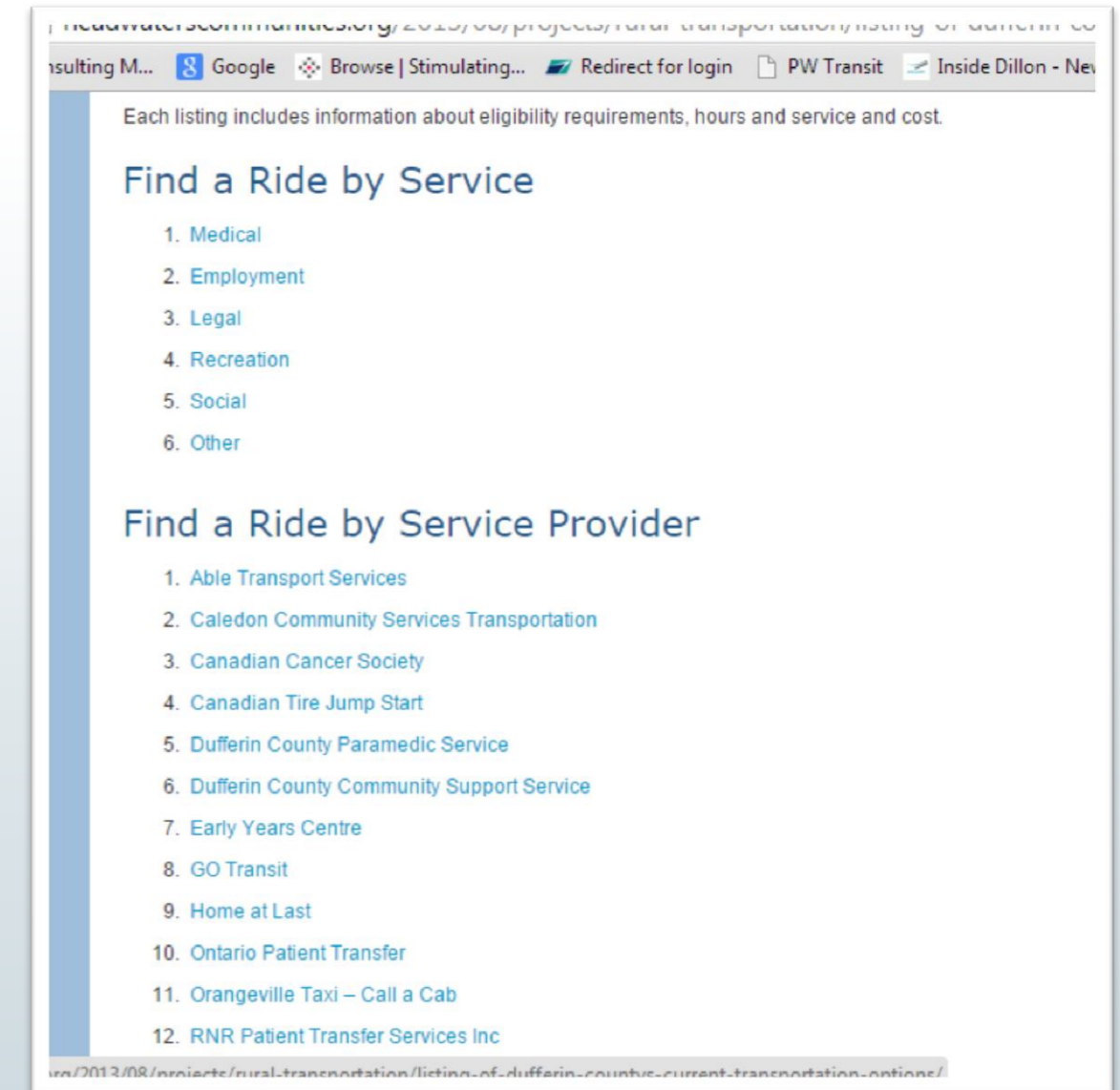
Assess Applications  
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**Step 6**

Select a Preferred  
Coordination Model

# Central Information Resource

- Develop central resource for customers to call about transportation service
- One website and customer service number that refers customers to the appropriate transportation service (based on their eligibility and need)
- Reduces client confusion about who to call and enhances accessibility to transportation



### Step 5

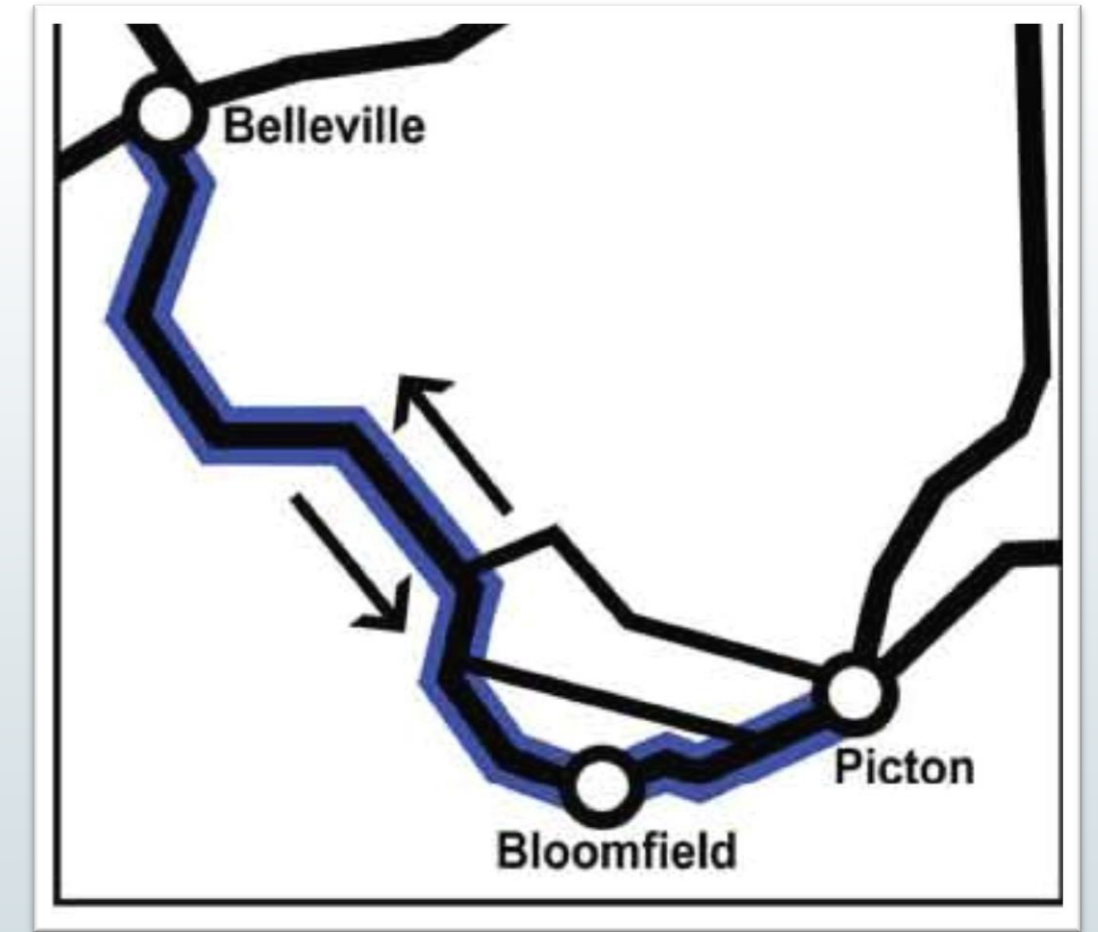
Assess Applications for Coordination Against Potential Coordination Models

### Step 6

Select a Preferred Coordination Model

# Establish Corridor Service

- Based on demand, identify potential corridor service linking to major destinations to maximize vehicle occupancy
- Feed eligible demand responsive routes to the corridor at safe transfer points
- Operate flex routing in urban areas based on demand
- Open eligibility to all residents for corridor services



**Step 5**

Assess Applications for Coordination Against Potential Coordination Models

**Step 6**

Select a Preferred Coordination Model

# Employer Partnerships

- Identify opportunity for major employers to join the partnership
- Work with employers to design service and establish funding agreement based on contribution from employer, employees and municipal subsidy
- Coordinate use of vehicles with demand responsive services and corridor services



**Step 5**

Assess Applications  
for Coordination  
Against Potential  
Coordination  
Models

**Step 6**

Select a Preferred  
Coordination Model

# Health Care Connections

- Establish a coordinator to work with medical professionals to more effectively schedule non-emergency appointments for long-distance trips
- Can help increase vehicle occupancy and free up resources to take on more trips
- May involve good working relationship with your LHIN and local doctors' offices





**Step 5**

Assess Applications  
for Coordination  
Against Potential  
Coordination  
Models

**Step 6**

Select a Preferred  
Coordination Model

# Purpose Specific Services

- Encourage more cost effective trip making by scheduling “purpose specific” runs
- Tuesday No Frills run; Thursday Summer Rec service
- Work collaboratively to identify travel patterns
- Work with retailers to establish incentives (e.g. \$10 off grocery bill)
- Open eligibility to these services



# Final Thoughts...

- Operating transportation services will continue to be a challenge
- Coordination provides an opportunity to make better use of existing resources by working together
- Various different coordination models have demonstrated success, and the framework will be unique to each community
- Moving forward can be a long and challenging process, buy-in necessary to improve the quality of life in our communities



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## Questions?

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