TOWARDS COORDINATED RURAL TRANSPORTATION:

A RESOURCE DOCUMENT

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ACCELERATING RURAL TRANSPORTATION SOLUTIONS

Lack of transportation is a significant issue in all rural and remote communities in Ontario which affects most of the determinants of health.

This report is a product of the **ACCELERATING RURAL TRANSPORTATION SOLUTIONS** initiative; a collaboration between the Rural Ontario Institute and the Ontario Healthy Communities Coalition. The purpose of this initiative is to enhance and strengthen the sharing of knowledge of effective models and emerging innovation in rural regional transportation. This project received funding from The Ontario Trillium Foundation, an agency of the Ontario government.

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For more on other resources or documents created through the **Accelerating Rural Transportation Solutions** initiative, visit http://ruralontarioinstitute.ca/resources-reports/

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1.0 Introduction

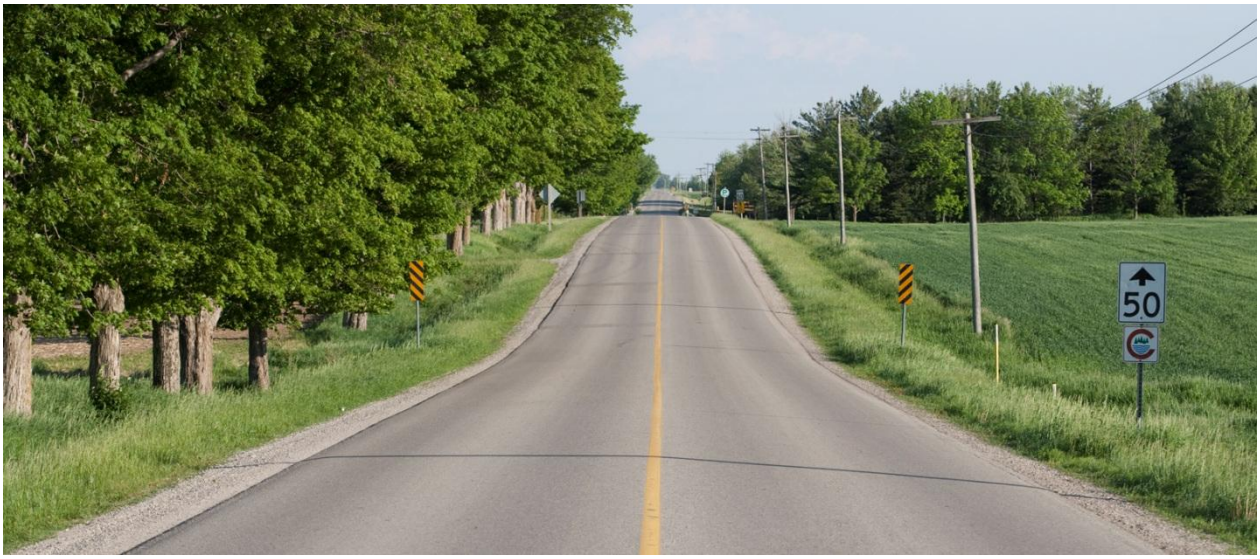
1.1 The Challenge of Providing Rural Transportation

The planning and delivery of public and community transportation in rural areas is faced with a number of challenges:

- The low density and dispersed nature of population, employment and services makes it difficult to provide effective transportation that meets all needs within the community at reasonable costs;
- The long-distance nature of trips (often travel is to adjacent urban centres to access services) makes the per trip cost of rural transportation expensive;
- A lower tax base makes available funds for transportation services scarce, particularly when competing with other municipal priorities and established provincial programs and budgets.

This has resulted in a lack of public and community transportation service in many rural communities. Where transportation services are in place, the availability, frequency and geographic area where service is provided is limited due to high costs and limited revenue opportunities (due to low ridership).

For rural residents without access to private automobiles, access to employment, education, healthcare and goods and services is a significant barrier and an impediment to remaining active members of the community.



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A number of municipalities, agencies, private sector companies and other organizations have responded to fill in the rural transportation gap. These include:

1. Municipalities that provide limited demand responsive service or fixed route corridor service connecting urban centres within a larger geographic area.
2. Community Care and Social Service Agencies that refer clients to transportation providers or directly provide community transportation services through paid drivers and/or volunteers. This is typically targeted to certain demographic groups (e.g. seniors) that are felt to be most at risk.
3. Hospitals that provide non-emergency patient transfer or discharge transportation service.
4. Adult Day Centres, Nursing Homes and Long-term Care Facilities that have access to a vehicle to provide transportation services to their residents or clients.
5. Employers, Institutions and Post-secondary Schools that provide shuttles for their workers or students.
6. School Boards that provide bus transportation for youth to and from schools.
7. Health Agencies that provide service to their clientele based on a defined disability or medical condition (e.g. the Canadian Cancer Society).

Each organization operates within their own mandate, which often leaves transportation gaps in the rural community. The result is a very disconnected system of many transportation providers, each with their own goals, servicing different client groups, trip types (e.g. medical trips only) and in some cases different geographic areas that do not always meet the needs of all residents.

While there are some examples of local coordination and cooperation, disconnected systems described above are a growing concern, particularly in rural areas with no access to or limited availability of public transportation services. The challenge is finding a transportation structure that works and can meet the broader goal of providing affordable and effective mobility for residents in rural areas, while recognizing the challenges of limited budgets.

1.2 Coordinated Rural Transportation

To address these challenges, a number of rural communities have established a cost-shared coordinated rural transportation model (Coordinated Transportation). Coordinated Transportation is a process that helps address the disconnected nature of multiple public and community transportation providers and enhances the cost-effectiveness of mobility as a whole, thereby improving overall service quality and

accessibility. It is defined as a "process in which two or more organizations interact to jointly accomplish their transportation objectives".[1]

In many rural communities, the process of establishing a coordinated transportation framework has resulted in a significant improvement in the cost effectiveness of services, which has often translated to an improvement in service quality and availability for residents.

In Huron and Perth County, five community care agencies established a coordinated transportation model branded as EasyRide. The new coordinated model has resulted in a 120 percent increase in coordinated trips between 2010 and 2014 through the use of a centralized reservation and dispatch scheduling software which coordinates vehicles from different agencies based on the effectiveness of the trip for customers rather than the by agency the vehicle is owned by.

In the Town of Deseronto, a steering committee representing the town, county, community care and social service agencies was formed to develop a fixed route regional transit service that links Napanee, Belleville, Picton/Bloomfield, Tyendinaga Territory, Tyendinaga Townships and the Town of Deseronto. The service receives funding from fare revenue, provincial gas tax, agencies concerned with low income, partnerships and municipal subsidy. Partnerships with various agencies have resulted in an increase in service levels and ridership throughout the community.

More detail on these successful examples can be found in a compendium document entitled *"Accelerating Rural Transportation Solutions: Ten Community Case Studies from Ontario"* by the Rural Ontario Institute and the Ontario Healthy Communities Coalition.

[1] TCRP Report 101 – Toolkit for Rural Community Coordinated Transportation Services, pg. 4

While there is significant evidence of the benefits of coordinated transportation and examples to learn from, choosing a framework that is right for your community and undertaking the process to get there can be a difficult task. Each region is different and will have unique opportunities and challenges when implementing a coordinated framework. The first critical question to ask is "Is coordination right for your community?" While there are numerous benefits, it can be a resource intensive process that requires some upfront costs. Coordinated Transportation is not for everyone and it is important to understand this before proceeding down this path.

There are also different levels of coordination that various organizations can explore; from full consolidation of service delivery to collaboration on policies and procedures. Each of these models will be explored as part of this guideline document.

If coordinated transportation is determined to be the 'right' strategy, there are a number of decisions that need to be made about the framework that will work best. This involves a financial feasibility and performance assessment of the existing operations against the preferred coordinated framework. Developing a collaborative process and understanding the right questions to ask is critical to moving toward an effective coordinated transportation model for your community.

1.3 How to Use This Document

The purpose of this document is to provide a user-friendly resource that allows municipalities, transportation service providers and social, health and community support agencies to assess and identify opportunities to collaborate and develop a coordinated transportation model. Through community leadership and shared agendas, it will be possible to achieve greater cost-effectiveness of service delivery and ultimately enhance the level of transportation available for residents of rural communities.

The document includes an assessment methodology for understanding the current situation and the process required to create a coordinated transportation framework.

The guide also provides a framework for multiple organizations within rural areas to establish their own coordinated structure.

Moving forward, the document is structured into following chapters:

Chapter 2: Context for Coordinated Transportation in Rural Environments

This chapter will answer the important question: Is a coordinated transportation structure right for my organization and this community? To assist in answering this question, coordination is defined, including its benefits to transportation providers, funding partners and customers. The characteristics and importance of rural transportation are also better defined to understand the opportunities available for municipalities, agencies and other organizations to coordinate.

Chapter 3: Coordinated Transportation Models

Several coordination models are fully explored in this chapter. Each model presents a different level of centralization versus autonomy. Advantage and disadvantages of each model are described in more detail. The four models presented in this chapter provide a basic framework which will allow communities to reflect on their existing level of transportation coordination and assess each model relative to their own context.

Chapter 4: The Building Blocks of a Coordinated Transportation Model

This chapter provides an overview of common transportation functions that can form part of a coordinated transportation model. These include the coordination of reservation and dispatch, marketing, policies and procedures, etc. The purpose of this chapter is to provide each community with the building blocks required to develop or adapt their preferred coordinated transportation model identified in **Chapter 3** to better meet the mobility needs of their community. For each building block, a generalized assessment method is provided that organizations operating or funding rural transportation services can use to assess the potential and/or desirability to establish or enhance a coordinated approach.

Chapter 5: Steps Required to Establish a Coordinated Transportation Model

This chapter outlines an assessment and implementation framework that multiple organizations can use to establish or move towards a more coordinated transportation model.

Chapter 6: Funding Options for Coordinated Transportation

Current funding opportunities available to organizations are highlighted in this chapter.

Chapter 7: Study Region Assessments

Three study regions were reviewed in detail to assess the potential to develop a coordinated transportation framework. The steps described in **Chapter 5** were used as a starting point to assess the potential for coordinated transportation in three study regions: Wellington County, Dufferin County and the United Counties of Leeds and Grenville.

Note:

It is important to note that the strategies, case studies and resources presented in this document are to be used at the discretion of organizations as an important reference in their planning and decision-making processes. This guide presents various methods for meeting the objective of establishing a coordinated transportation structure serving rural areas. Understanding that circumstances will vary from region to region, it is expected that organizations will adapt the approaches and examples identified in this document to their own situations and develop appropriate solutions for their communities.

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2.0 Context for Coordinated Transportation in Rural Environments

2.1 Coordinated Transportation – A Definition

Coordinated Transportation means following a process and implementing strategies that address the disconnected nature of multiple community transportation providers in a county or region.

The Transit Cooperative Research Program (TCRP) defines transportation coordination 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] This results in savings which can be used to enhance the number of trips provided and/or the quality of transportation for all clients serviced by the coordinated framework.

2.2 Benefits of Coordinated Transportation

To assess and fully understand the benefits of coordinated transportation, three different perspectives must be taken into consideration:

1. The organizations providing transportation services (transportation provider).
2. The clients and residents that require transportation services (customer).
3. The funding agencies that provide the revenue necessary to deliver transportation services (funding partner).

2.2.1 Transportation Providers

The objective of each transportation provider is to meet its mandate to provide an effective and efficient service for its eligible customer group. For a municipal transit system, it may mean providing basic mobility for all residents within a defined urban area of a municipality. For a Community Care Agency, it may mean enhancing the ability for seniors to live at home by providing transportation access to medical appointments and other daily needs (e.g. grocery shopping). Transportation providers are accountable to their funding partners to spend resources effectively and motivated to meet the transportation needs of their customers. From a transportation provider's perspective (whether public, private or not-for-profit), the benefits of developing a coordinated transportation framework include the ability to:

[2] TCRP Report 101 – Toolkit for Rural Community Coordinated Transportation Services, pg. 4

1. Access new funding sources that were previously unavailable to an individual organization – For example, new funding programs linked to the coordination mandate; access to provincial gas tax funds; or access to other funds through the partnership.
2. Stretch scarce resources through better overall resource management - An example would be reducing the workload of staff responsible for reservation/dispatch by creating a centralized position within the coordinated network. This, in turn, can free local staff to do other work important to the organization or to reinvest the savings into additional transportation services.
3. Enhance purchasing power and use economies of scale to upgrade transportation capital and other resources – An example would be the ability for a group of service providers to purchase a scheduling software program that would be unaffordable and ineffective to an individual transportation provider.
4. Increase the potential for shared rides, which in turn increases trip making capacity by reducing duplication of service – For example, a centralized scheduler/dispatcher could allocate passenger trips based on the closest available vehicle within the coordinated network rather than limiting them to a vehicle owned by the agency/organization they are registered to.

2.2.2 The Customer

The desire of the customer is to enhance their mobility within the community, including the ability to access education, employment, health services, recreational, shopping and personal services. While most residents in rural areas do not expect the same level of service as provided by urban public transit systems (due to the rural nature of the region), there is a basic expectation to have reasonable access, regardless of age, ability or residential location within the rural community. From a customer's perspective, the benefits of a coordinated transportation framework include the ability to:

1. Enhance their mobility through the availability of transportation services – This may include increased service hours, service provision in new areas or the ability to make more trips.

2. Reduce confusion concerning "who to call" for transportation services – This can be achieved by providing and communicating one phone number to call for all transportation services within the county/region.
3. Expand the eligibility criteria for service – With the objective of making transportation services more inclusive for all residents (e.g. many community care agencies that are funded by their Local Health Integration Network restrict eligibility to seniors and adults with disabilities).

2.2.3 Funding Partners

The objective of funding partners is to ensure that the funds they provide are most effectively used to meet their mandate. This could be to enhance mobility for:

1. Seniors (with the objective of enhancing their ability to age at home and reduce provincial spending on hospitals and long-term care facilities).
2. Employees and those seeking employment (providing access to employment opportunities locally or in adjacent communities).
3. Students (the ability for students that are bused to school by a student transportation service to participate in after school activities and/or part-time employment).
4. Persons using social assistance programs (provides clients with the ability to access services and employment opportunities).
5. Persons with health related issues (promotes independent living for persons with a chronic health related issue or with a disability. An example is the Canadian Cancer Society or the CNIB).

From a funding partner's perspective, the benefits of a coordinated transportation framework include the ability to:

1. Make better use of the funding through more efficient resource management (and the delivery of a more effective service).
2. Reach a greater number of customers and provide a better level of service (by taking the savings gained through greater cost effectiveness of the service delivery and reinvesting the savings in service improvements).

When assessing the potential to develop a coordinated transportation framework, these benefits will need to be understood by each of the partners participating in the process and communicated to various stakeholders and members of the community.

2.3 The Rural Context

20% of Ontario's population (2.6 million residents) live in Rural Ontario

The concept of "rural" can be interpreted in many different ways and there is no simple definition that can capture all the aspects of what makes a place rural. A person's understanding of "rural" is

often dependent on where they were raised or currently live. Generally, there are two common attributes that define rural communities:

- long distances from large urban centres; and
- low population and employment density.

The Rural Ontario Institute defines rural areas (for statistical purposes) as areas outside Census Metropolitan Areas (CMA)[3]. Based on the 2011 census, approximately 20 percent of Ontario's population (2.6 million residents) live in rural Ontario.[4]

When addressing the need for transportation services in rural areas, it is important to understand that there are different types of rural areas, each with unique characteristics that may change the transportation landscape.

A report entitled "Planning Transportation in Rural Areas" by the U.S. Federal Highway Administration in Cooperation with the Federal Transit Administration defines rural areas by three types:

1. **"Basic Rural** – dispersed counties or regions with a few or no major population centres of 5,000 or more. Mainly characterized by agricultural and natural resource based economies, stable or declining populations, and "farm-to-market" localized transportation patterns.

2. **Developed Rural** – fundamentally dispersed counties or regions with one or more population centre(s) of 5,000 or more. Economies in these areas tend to be mixed industrial and service based in the cities and agricultural and natural resource based in the rural areas. Populations tend to be stable or growing, and transportation more diverse (commuting intercity travel/freight, and other purposes).

3. **Urban Boundary Rural** – counties or regions that border metropolitan areas and are highly developed. Economic growth, population growth, and transportation are tied to the urban centre. Many of these areas have experienced high levels of growth in recent years."[5]

Within the Ontario context, two examples of **Basic Rural** include the County of Huron and the County of Grey. Such rural areas typically cannot accommodate a fixed route, public transit service due to the low densities and long distance nature of trips. Residents without access to a private automobile rely on the

[3] As Defined by the 2011 Canadian Census
[4] Source: Overview of Ontario's rural geography – Rural Ontario Institute, June 2013
[5] Source: Planning for Transportation in Rural Areas, Federal Highway Administration in Cooperation with the Federal Transit Administration, pg 5.

good will of family and neighbours or on social or community care agencies to provide mobility. These agency services are typically in the form of demand responsive services and are based on a specific eligibility criterion. Services are often provided by paid drivers using an agency van or volunteers using their own vehicles.

The United Counties of Leeds and Grenville and Dufferin County (Ontario) more closely represent the definition of **Developed Rural**. Many of the central towns or small cities in Developed Rural areas operate a limited fixed route and/or demand responsive service for residents within the urban area of the county. A major challenge is the provision of service to the rural remote areas outside of the small towns and cities.

An example of **Urban Boundary Rural** is Wellington County and the rural areas within the Region of Waterloo. These areas have a strong attraction to a larger urban centre for education, employment and services. The adjacent large urban areas within these geographies typically have a public transit service (e.g. Guelph Transit in the City of Guelph which is surrounded by Wellington County or Grand River Transit at the centre of Waterloo Region). Due to the strong attraction to employment, education and services in the urban area, there is often a demand for fixed route services operated by the municipal transit provider to be extended to a smaller rural hamlet. Within the rural area, demand responsive services as described above are sometimes provided for persons with disabilities.

2.3.1 The Importance of Rural Transportation

Rural residents, employers and other stakeholders have been voicing concerns about the lack of adequate transportation services in rural areas for a long time. Many different types of organizations across rural and small town Ontario are working on improving transportation services within their regions. This includes both municipally-sponsored efforts and partnerships among diverse community service organizations.

The need for such collaboration is becoming more important as the implementation of other societal priorities such as "aging at home" strategies necessitate that these services be strengthened and improved. The typical older demographic in rural areas emphasizes the fact that our capacity to meet social, economic and health needs solely by relying on private cars and volunteerism is increasingly inadequate. Neighbours volunteering to assist neighbours through the provision of transportation may be exemplary but such efforts are also uneven in their reach and hard to sustain.

Issues such as rural youth unemployment and access to education/skills training is a particular problem and if rural areas are to sustain a high quality regional labour force, lower income segments of the population need to be mobile and able to get to jobs or training in adjacent communities despite having lower levels of car ownership.

Every county or region will have its own priorities when it comes to rural transportation. Each rural area is different in a number of ways: how it is organized municipally; the size and number of population centres within the area; the proximity to/dependence on a major urban centre; existing access to transit services and the demographics of the area. Despite these differences, some level of rural transportation service will be required to provide residents with access to education, employment, social services, health care, recreation and other amenities; to provide employers with access to a labour force; and to provide retailers with access to customers. Rural transportation is not just for seniors; it is also for students, employees, low income families, those who are unemployed, persons with disabilities and those with health conditions. Providing an alternative choice to the private automobile is also increasingly a priority for those concerned with reducing their environmental footprint and enjoying a healthier lifestyle.

2.3.2 Challenges to Enhancing Rural Transportation Services

While each rural area is unique, there are many common challenges to providing effective and affordable transportation services within rural environments.

Lower population densities, longer travel distances and the dispersed nature of employment and services makes providing community transportation and/or public transit services very difficult. These factors can reduce the cost effectiveness of service, often measured by calculating the ratio of passenger revenue to operating costs (R/C Ratio). When the financial performance of a system is poor, transportation providers compensate by:

1. Reducing the level of service provided (thereby reducing overall costs)
2. Increasing the cost of passenger fares (increasing revenue)
3. Seeking additional forms of funding or subsidy
4. Increasing the effectiveness of the service (increasing the number of shared rides per hour of revenue service provided)

Reducing the service level in a system that already operates at a basic level of service will in many cases impact the ability to provide mobility to clients and residents in a community. Community care and/or social service agencies often compensate by using volunteers to deliver service; however, attracting new volunteers is becoming a greater challenge, and this decline in volunteerism is expected to continue. One challenge that volunteer drivers are facing is increasing cost of fuel and maintenance along with a liability concern about having the appropriate levels of car insurance.

Increasing passenger fares can be difficult as it can often make the service unaffordable. With the long-distance nature of trips in rural areas, a fare-by-distance strategy is often employed, with fares between $5 and $25 per one-way trip not uncommon. For passengers with low or fixed incomes, high fares will limit their ability to use the service.

Finding outside funding or increasing existing subsidy levels can also be a challenge. Municipalities are reluctant to add to an already stretched local tax base, particularly if ridership is low or the service only benefits a small portion of the community. Grants for new services or other funding sources are often limited or tied to a specific population group, or are not sustainable over the long-term (a grant may be for only a pilot program with a limited timeline).

A goal shared by most transportation providers is to increase the effectiveness of the service. This can be achieved by increasing the number of passengers per vehicle (vehicle occupancy), running vehicles more efficiently or minimizing the number of coordination and/or management staff involved with transportation. For most existing transportation providers, the operation of their individual service is already very efficient, with limited opportunity to increase the effective use of existing resources.

Most rural transportation systems operate with a minimal staff complement and staff may have several roles within the organization. In many cases, a coordinator of transportation services is not a dedicated position and performs other functions for the organization.

The vehicle occupancy for each trip can be difficult to increase due to the nature of rural transportation. Low densities, dispersed origins and destinations and long-distance travel make grouping trips a challenge. There may also be privacy concerns depending on the clients being served. With an already limited market for service, increasing the efficiency of one system is a challenge, particularly if there are multiple organizations providing their own transportation service within the same geographic area.

Long-distance trips often occupy vehicles for an entire day in an adjacent community, particularly when clients require access to regional hospitals. This limits the availability of service within local rural communities.

Where services are provided by volunteers, there is limited opportunity to increase the number of passengers per trip as many volunteers are reluctant to operate as a ‘bus service’, picking up multiple passengers from different origins; each headed to a different destination. Volunteers who use their own vehicles are also restricted by their vehicle size.

Working individually as separate agencies, these challenges are difficult to overcome. Coordination provides the opportunity to increase the number of resources available to a common organization, thus the ability to share resources and share riders. By increase the number of potential customers and the number of vehicles a transportation coordinator has access to, efficiencies can be gained through greater economies of scale.

2.4 Existing Community Transportation in Rural Areas

The challenges of providing public transit services in rural areas often results in a series of independent public, private and not-for-profit community transportation service providers delivering services to meet the needs of targeted population groups.

Within rural areas, there are often a number of transportation options that already exist. The following section describes the types of transportation providers that are commonly found in rural areas that could be engaged and considered for possible inclusion as part of a future coordinated framework.

2.4.1 Municipal Conventional and Specialized Transit

Many small municipalities have public transit services to enable mobility for their residents. Typically public transit is provided in transit service areas (TSA'S) where there is an urban population concentration of more than 10,000 to 15,000 residents. Small urban areas might have two to four bus routes operating on an hourly schedule five or six days per week. In urbanized areas of 50,000 to 100,000, public transit typically operates seven days per week with service frequencies of 30 minutes during the peak periods. Above a population of 100,000, the transit service levels increase for both frequency and hours of service.

Demand responsive, specialized transit services for persons with disabilities are also provided by a number of rural municipalities. Clients must register to be eligible for this service. While a municipality is not required to provide a specialized transit service, it must do so if it has a conventional transit service in place. The Accessibility for Ontarians with Disabilities Act (AODA) legislation requires all municipalities that provide conventional transit services to provide a comparable level of transportation service (service hours, geographic area, fares, etc.) for persons with disabilities.

The specialized transit service is typically operated directly by the municipality or contracted to a private operator using paid drivers and heavy duty transit vehicles. It may in some areas be operated by a non-profit charitable organization. Funding is provided through a combination of passenger revenues, municipal subsidy, provincial gas tax and other revenue sources (e.g. advertising and charter revenue), or in the case of non-profit organizations, charitable donations and fund raising, etc.

There are many cases where small urban areas within a larger rural region operate both a conventional and specialized transit service. Examples include the City of Stratford within Perth County, Town of

Orangeville within Dufferin County and City of Brockville within the United Counties of Leeds and Grenville. Transit services in these areas do not typically extend beyond the urbanized area.

There are other areas where existing public transit services are extended to service more rural communities within the broader region. The City of Kawartha Lakes recently extended its urban transit service in Lindsay (20,000 population) to two smaller township areas within the rural municipality: Bobcaygeon (3,000 population) and Fenelon Falls (1,800 population). These are smaller urban centres located within the largely rural municipality, and the service connects these residents to the larger urban area of Lindsay. A concentration or density of population and employment is necessary to provide cost effective fixed route transit services within rural areas.

2.4.2 Community Care and Social Service Agencies

A number of transportation services are provided by community care or social service agencies. These agencies often have a global community-based mandate beyond transportation and provide transportation services as one tool to help meet this mandate. As an example, a number of community care agencies are concerned with improving the quality of life for seniors, children, youth and/or low income residents in a community. Through this mandate, they recognize the importance of accessibility to community services, medical care, employment and recreational activities as an essential component to an individual's quality of life. Where a mobility gap is identified, community care and social service agencies often address that gap by:

- Delivering their own transportation service (the agency purchases vehicles and employs drivers and coordinators to operate the service);
- Coordinating service provided by other transportation service providers or a volunteer-based transportation service (the agency coordinates trips but does not own vehicles or employ drivers); and/or
- Referring clients to other transportation providers within the community (this can sometimes involve partially subsidizing client trips).

Where agencies provide or coordinate transportation services, passengers must typically register to use this service by filling out an eligibility form. Since the amount of funding for these services is often tied to the mandate of the organization funding the service, it is not uncommon to see restrictions related to eligibility for the service or the type of trips that can be made. As an example, many Local Health Integration Networks (LHINs) provide a number of community care agencies with funding that is restricted to servicing seniors and persons with disabilities. Therefore, the transportation service provided may not be available to an adult, youth or child without a disability.

In most cases, fares are charged to clients to help pay for the service, using a combination of a fixed fare for local trips within a smaller urban area and a 'fare by distance' formula for long-distance trips. Agencies will also often wait for clients at their destination if a long-distance medical trip is being provided and may charge a wait time fee.

Volunteer transportation forms a significant part of services provided by community care, health and social service agencies. The agency is responsible for coordinating the service, including recruiting, screening and training volunteers, and coordinating the trip when requests for service are made. Volunteers use their own vehicles to provide clients with transportation services and are typically compensated by the client at a per kilometre rate.

General trends in Ontario show a shrinking volunteer base, which will require strong marketing campaigns for recruiting new volunteers and more effective use of existing volunteers.

2.4.3 Non-Emergency Patient Transfer or Discharge Transportation Service

A number of hospitals require transportation service for non-emergency patient transfer or discharge services. This is often contracted out to private transportation carriers and in some cases contracted to a community care agency. For patient discharge, the cost of the service is typically charged to the patient requiring the service. Some hospitals cover the cost as they understand the benefit of efficiently clearing beds, in a timely manner.

The process to decide the type of trip to be provided is usually made by the triage nurse. A priority system for non-emergency transfers begins with either a Community Care Agency that provides non-emergency medical transportation or a private Patient Transfer Service. Where the transfer is for a patient that requires a certain level of care, the hospital will decide to use EMS (ambulance).

Vehicles providing non-emergency medical transportation often have stretcher capabilities and staff are trained in first aid and CPR.

2.4.4 Adult Day Centres, Nursing Homes and Long-term Care Facilities

A number of adult day centres, nursing homes and long-term care facilities have access to vehicles which are used exclusively for their residents or clients. Adult day centres typically use their vehicles to transport program participants to/from their programs. Often, during the midday and evening periods, these vehicles are parked and not used. Many nursing homes and long-term care facilities also have access to vehicles which they use for their residents for group outings or to access programs and activities. These vehicles are typically underutilized during the day.

Under a coordinated transportation framework, the potential exists to utilize such vehicles for other community transportation purposes, so long as the needs of residents and clients of these facilities continue to be met.

2.4.5 Major Employers

In rural areas, where public transit services do not exist, large employers may provide their own shuttle service to get employees to and from work. These services are typically fully funded by the employer and restricted to use by employees of the organization. Schedules are very specific and target shift start and end times. In many cases, a transfer point is identified within a nearby urban area, where a concentration of employees can be picked up and dropped off. This transfer point usually has access to municipal public transit services.

Vehicles are generally smaller light-duty vans that are contracted to a private sector transportation provider or a municipal transit agency. Under a coordinated transportation framework, these vehicles can potentially be used throughout the day by having the employer contribute funding to a coordinated transportation framework instead of fully funding their own service.

2.4.6 Health Agencies

A number of health agencies own their own vehicles and provide service to their clients based on a defined disability or medical condition (e.g. the Canadian Cancer Society or the CNIB). Trips are provided primarily for group outings. Similar to nursing homes and long-term care facilities, these vehicles are typically not fully utilized throughout the day and an opportunity exists through coordination to better utilize these vehicles.

2.4.7 School Bus Operators

School bus transportation is provided for elementary and secondary school students for access to and from schools in the morning and early afternoon. The challenge for students is that the service is focused on the home to school and school to home connection, and is not conducive to students participating in after school activities, working at part-time jobs or seeking sports and recreation on weekends.

School buses and drivers can be a significant resource in rural areas. Transportation is funded by the school boards in the region (within strong provincial guidelines and budget limits) and there are usually separate bus contracts for each school board for both elementary and secondary schools. Where this occurs, each school board program has its own funding and its own set of rules and restrictions.

While school bus operators are busy during the morning and early afternoon weekday periods, buses remain idle for the remainder of the day and during the summer months. This provides a potential resource for rural areas to utilize when considering approaches to provide transportation services to their residents. This could include the use of school buses or drivers for shuttle services, group activities, etc. Under a coordinated dispatch model, this resource could be made available and used where large vehicle capacity is required or where there is a shortage of other vehicles to make a trip.

2.4.8 Taxi Operators

While many rural areas do not have local taxi operators, they are typically present in the smaller urban centres located within or adjacent to the rural area. Taxi services provide mobility to residents with no restriction on eligibility. There are two challenges with the provision of taxi services in rural areas:

1. **High Cost:** This is particularly true with long-distance trips that are common in rural areas and high costs will limit taxi use and overall mobility.
2. **Limited Number of Providers:** Because of the high costs, demand for service in rural areas can be minimal, which limits the number of taxi licenses that taxi operators apply for.

There are some municipalities and community care agencies in Ontario that contract their service to the taxi industry, particularly for local trips. This has two benefits:

1. In certain cases, a reduced rate can be agreed to by guaranteeing a certain number of trips per day (or blocking off a number of hours that taxi operators will provide service for the agency).
2. The municipality or agency only pays the operator when a trip is being delivered instead of a fixed hourly rate around a defined period of service. During periods when or areas where demand is low, this can reduce the overall cost of the service.
3. By increasing the number of trips that taxi operators are guaranteed, this can motivate certain providers to apply for additional licenses and have vehicles available for other trips not coordinated through the municipality or community care agency.

2.5 Is Coordination Right For You?

A coordinated transportation model is one of several possible management or problem solving tools that can be used to address improved transportation services in rural areas. It is important to note that it will not solve all transportation problems in all communities. Coordination has its most substantial impact when the effectiveness and efficiency of existing transportation services are improved through the implementation of a coordinated framework. In instances where a travel market is not being served and/or where existing transportation services are already highly efficient, coordination by itself is not likely to be an effective strategy. In these cases, additional resources are needed to address new or underserved markets. It is important that communities and organizations clearly identify such issues to ensure that the proper path is selected to pursue rural transportation improvements.

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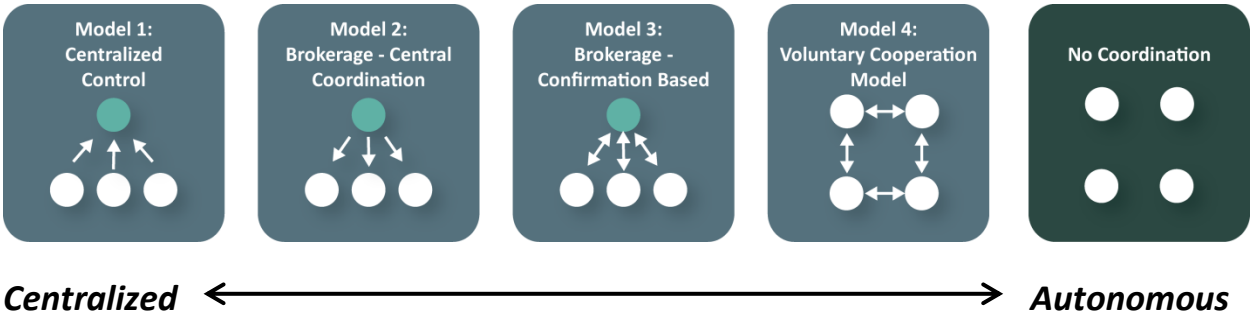
3.0 Coordinated Transportation Models

Coordinated transportation is a proven method used in a number of communities to address the mobility challenges that face rural areas. There are a number of coordination models that exist, including coordination between municipalities, between community care/social service agencies (agencies) and between municipalities and agencies.

The level of coordination implemented in each model can vary from simple collaboration on policies and procedures to full coordination or consolidation of service delivery. There are working examples of each model and the decision to move from one end of the spectrum to the other is partially based on the structure and culture of each participating organization and the degree of cooperation and trust that can be developed. The degree of coordination will require an assessment of financial resources, the geography of the communities being served and the nature of existing and potential clientele.

The following chapter describes a hierarchy of 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. This is illustrated in the figure below.

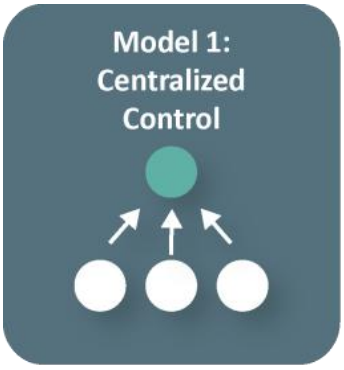


The degree of coordination each community is willing to take on will vary and is dependent on a number of factors. The highest level of coordination is not necessarily the most appropriate and should not be set as a target simply because it sits on top of the hierarchy. Each community must decide the level of coordination that is right for them and use this to help develop a coordinated model for the planning and delivery of transportation services.

A brief description of each model, including its applicability to certain situations, is described below.

3.1 Model 1: Centralized Control

Description



In the Centralized Control Model, two or more transportation providers enter into an agreement to have one organization take full responsibility for transportation services within the community (the lead organization). In this scenario, all transportation operations are combined, the fleet is pooled and everything is managed by the lead organization.

The transportation providers that gave up control of transportation operations (partner organizations) contribute to the new framework by providing funding for transportation operations to the lead organization (under a service agreement) in lieu of operating the service themselves. Transportation services continue to be offered to all clients of both the lead and the partner organizations. Other stakeholders that provide funding for transportation services can also be part of the partnership, even if they never provided transportation services. An example is a social service agency that provides funding for its clients to use transportation services. That funding could now be diverted to the lead organization.

In many cases, all partner organizations continue to sit on a steering committee where information is shared and decisions about the service provided are made.

This model includes coordination of all aspects of the service as there is one lead organization providing the service.

Advantages

There are a number of advantages of adopting this model. The model takes advantage of all available resources and provides full coordination. Since all resources are treated equally (they are not tied to a specific organization or agency), the framework has the greatest ability to increase the effectiveness of the service (increasing ride sharing opportunities). In a larger dedicated organization, staff will typically have better training and greater expertise regarding the provision of transportation services.

1. The model also has the greatest potential to address gaps in existing rural transportation as there is a single entity with the capacity to develop a business case for the expansion of services. The increased size of the transportation organization can enhance its ability to access funding opportunities or subsidies.
2. For the customer, the model eliminates any confusion of who to call for transportation service and which service a client may be eligible for. This can increase overall public awareness of the service, which may in turn increase the overall usage.

Disadvantages

The disadvantages are that some local autonomy is lost and certain funding may be at risk. There is the potential for some loss of volunteers (attracted and dedicated to a specific agency) and this could lead to increased costs. As well, the application of local knowledge and individual matching of passengers with drivers could be hindered. Finally, there could be a perceived reduction in customer service and privacy concerns for some clients.

Example

Deseronto Transit provides a good example of this model. Deseronto Transit is a regional transit service that links Napanee, Belleville, Picton/Bloomfield, Tyendinaga Terriroty, Tyendinaga Township and Deseronto. In this partnership, the lead organization is the Town of Deseronto. They own the fleet and provide the service. A steering committee representing the town, county, community care and social service agencies guides the provision of the two transit routes providing service within Hastings County and to the City of Belleville. The service was officially launched in August of 2008 to all members of the public.

Of interest is their approach to partnerships. Deseronto Transit partnered with PELASS, an organization that was previously covering the cost of taxi rides for their clients to attend addiction treatment. PELASS has agreed to purchase a guaranteed number of bus passes in exchange for service to key destinations for their clients. The funding received from the partnership covers the cost of operating one route. This has resulted in increased ridership, which in return allows for an increase in provincial gas tax funds and provides more service to the general public.

While not considered a true coordination model, the **Region of Waterloo** provides an example of a model where regional upper-tier municipality provides centralized service to their local municipalities. The Region provides regional public transit service (Grand River Transit, GRT) within the urban municipalities of Kitchener, Cambridge and Waterloo as well as specialized transit services to both urban and rural areas in the townships. The Region uses 'area rating' to apportion the municipal share of transit costs to the area municipalities which receive service. The Region has reviewed the need for public transit to its rural areas and developed a methodology for assessing and implementing such services. A GRT bus route was extended from Kitchener Waterloo to St. Jacob's and Elmira in Woolwich Township and provides a good case study from which to assess other potential service extensions.

Applicability

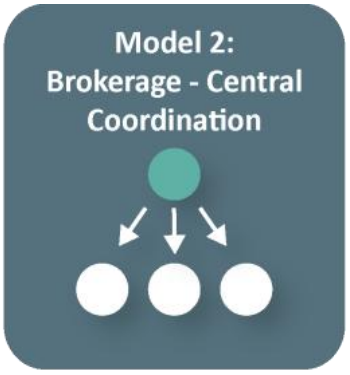
This model will make sense where there is one organization within the area with a clear mandate (and associated expertise) to provide transportation services. Sometimes, there are rural areas within a municipality (upper or lower tier) that provides public transit services in its urbanized areas.

This model also applies to situations where a new service is implemented (e.g. two or more organizations that do not currently provide service decide to jointly fund a coordinated service, with one organization acting as the lead).

For situations where rural areas are within a municipality that provides public transit services only in its urbanized areas, it is suggested that the rural community work with their politicians and municipal staff to determine the needs and opportunities to provide some level of rural transportation service.

3.2 Model 2: Brokerage – Central Coordination

Description



In the Brokerage – Central Coordination Model, individual organizations retain ownership and operation of their vehicles. However, customers looking for transportation service do so through a single point of contact. This point of contact (the lead organization), has full autonomy to plan and schedule transportation services and determine the best available service that will meet the needs of the client and improve the efficiency of the overall network. When this determination is made, a trip is booked and the service is delivered.

In the case of a demand responsive or volunteer transportation services, if a client eligible for organization "A" calls to request a trip, the lead transportation coordinator can book the trip using a vehicle owned by any other organization in the partnership if it is deemed to be the most effective. If a vehicle owned by organization "B" is deemed to be the most effective, the transportation coordinator will schedule the trip using organization "B". An invoice would then be sent back to organization "A" for the costs incurred by organization "B" associated with the delivery of service.

The transportation coordinator (or dispatcher) at the lead organization will also help plan and schedule services, schedule demand responsive trips, invoice clients and partner organizations for coordinated trips and track data and utilization. This method has been proven through case studies to reduce overall transportation costs for all partners.

In this model, centralized marketing and awareness is usually provided given that there is one lead organization that is taking ownership of coordinating the service. A centralized intake process is optional for agencies with demand responsive services participating in the partnership.

For demand responsive services, is also recommended that the eligibility criteria and fare structure is standardized to increase the effectiveness of coordinated service planning and delivery. Standard

policies and procedures would also help ensure seamless service delivery to all customers, regardless of the service provider that is delivering the trip.

For conventional services, transportation providers typically use this model to broker service to low demand areas or during low demand periods. As an example, a number of conventional transit services broker certain trips to the taxi industry. A fixed rate is negotiated with the taxi service to provide on-demand trips to low demand areas that does not justify the full operation of a fixed route bus service. The customer will call the transit agency's dispatcher and request a trip. The dispatcher will coordinate the pick-up. The passenger will pay the taxi operator the regular fare (sometimes with a small premium) and deliver the person to a pre-fixed transfer point where the passenger can board a conventional bus to complete their trip. This is an effective model for small urban centres to address the needs of adjacent rural communities.

Another conventional transit example is when two separate transportation providers enter into a fare and service integration agreement. Fare and service integration involves two separate transportation providers coordinating their service so it is seamless to the customer. There is an agreement to enter into each other's service area or facilitate transfers between the two systems. This avoids passengers from paying a double fare when crossing the service provider's boundary and minimizes the number of transfers required.

Coordinating vehicle purchases, vehicle maintenance, driver training and volunteer recruitment are all optional under this model.

Advantages

Creating or assigning a single organization as the administrator or broker of transportation services leads to improved customer service and an easier to use system for the client. It also allows resources to be pooled for economies of scale. Local organizations retain ownership of their fleet and operations and have more 'say' in the provision of transportation services.

Disadvantages

The major issue that has arisen with a single point of contact brokerage system is that some customers see the program as less responsive to their needs than a purely local system. Addressing this issue can be challenging, but with good management, such client concerns can be overcome.

Example

EasyRide in Huron and Perth Counties provides a good example of this model. Seven community care agencies have established a brokerage and dispatch model branded as EasyRide. ONE CARE Home and Community Support Services has taken the role as the lead agency. The new coordinated model has since seen a 120 percent increase in the number of coordinated trips since 2010 through the use of a centralized reservation and dispatch system which coordinates vehicles from different agencies based

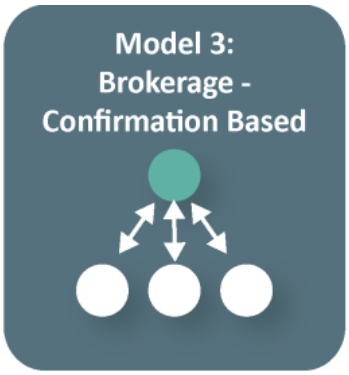
on the effectiveness of the trip for customers rather than through ownership of the vehicle. All clients in Huron and Perth Counties now call EasyRide for their trips bookings. The central scheduling and dispatch office has access to all agency vehicles and books trips based on what makes sense. A web-based scheduling software was purchased and is accessed centrally as well as at each individual agency. The partnership group has also worked together to develop standardized policies and procedures.

Applicability

This model makes sense when one organization is willing to take the lead and contract out service to the most appropriate partner, while individual organizations retain ownership and operation of their own vehicles.

3.3 Model 3: Brokerage – Confirmation Based

Description



Similar to the Brokerage – Central Coordination Model, in the Brokerage – Confirmation Based Model, transportation providers retain ownership of their vehicles. The individual funding agencies and transportation providers remain independent, but customers wishing to access a ride can do so through a single point of contact. This point of contact (lead organization) has access to information about all vehicles in the network and books the trip or refers the trip based on what makes sense. This model focuses on organizations working together to book trips in the most effective manner. The key difference from the Model 2 is that the lead organization must request permission from a partnering organization before booking a trip and if denied, refers the client to another organization or informs the client they cannot accommodate their trip. When a scheduling and dispatch software program is in place, each partner has access to the program (through a software license) and the full list of available vehicles in the partnership. This allows each partner to have the ability to continue to book their own trips if desired until trust is developed with the lead transportation coordinator.

In this model, centralized marketing and awareness is usually applied where there is a single point of contact for trip booking. However, individual organizations continue to market their own services as the ability to book a trip with each individual transportation provider is still available.

Standardized eligibility criteria and fare structure are also recommended to ensure the model is effective. Standard policies and procedures would also help ensure seamless service delivery to all customers, regardless of the service provider that is delivering the trip.

Coordinating vehicle purchases, vehicle maintenance, driver training and volunteer recruitment are all optional under this model.

Advantages

The advantage of this model is similar to the Brokerage – Central Coordination Model, including improved customer service and an easier to use system for the client. It also allows resources to be pooled for economies of scale while local organizations retain ownership of their fleet and operations. The advantage is that local organizations have more 'say' in the provision of transportation services then in the Brokerage – Central Coordination Model. This can also be useful during the initial stages of coordination where trust issues arise in giving up full control of operations.

Disadvantages

The disadvantage of this model is that it can add an extra step in the trip booking process and potentially reduce the efficiency of the service over the Brokerage – Central Coordination Model.

Example

A good example of this model is the ***Holmes County Transportation Coordination (HCTC)*** in Ohio. HCTC, which began operations in April 2000, works in partnership with 27 member agencies to provide coordinated transportation for eligible Holmes County residents. HCTC provides curb-to-curb service to senior citizens, developmentally disabled students, schools, and residents with medical appointments outside of the county.

HCTC takes all of the trip reservations and completes the vehicle scheduling. Trips must be confirmed by the local agency before the booking is complete. Upon scheduling a trip, HCTC contacts each agency to assign specific trips. The 27 agencies have a combined fleet of 130 vehicles to deliver the service.

For two days of each month, HCTC provides trips for the residents of Holmes and Morrow Counties to hospitals in Cleveland. A single telephone number has been established for people to call to schedule pickup. This service uses a pool of volunteer drivers. The result has been a lower cost for passengers, reduced vehicle miles, and higher ridership. By establishing one telephone number and scheduling office, Holmes County has been successful in reducing the duplication of services.[6]

Applicability

This model makes sense when organizations want to remain largely independent but are looking for opportunities to combine trips, reduce redundancy or improve efficiency. This model is more common for demand responsive services and has less application for fixed route community transportation or transit services.

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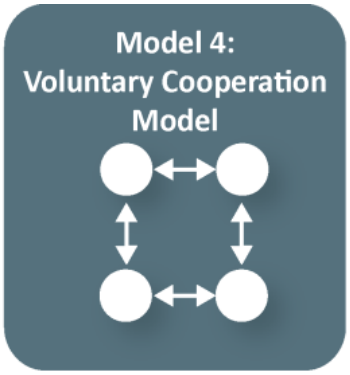
[6] Transit Cooperative Research Program: Report 101

3.4 Model 4: Voluntary Cooperation Model

Description



This model requires the least amount of coordination. In effect, organizations continue to operate independently, with few major changes being witnessed by the customer. Coordination does occur in certain areas as organizations develop common policies for vehicle purchases (including specifications), insurance, maintenance, dispatch software, policies and procedures. There is no need to standardize eligibility or fare structure because each transportation service provider remains largely unchanged operationally.

Lead organizations often take on a centralized information or referral role, where they can direct individuals that are looking for transportation services to the most appropriate provider(s). For this to occur, a centralized number and/or website should be established. The lead organization is aware of all transportation providers in the partnership, including their geographic coverage, service hours and eligibility criteria (if applicable). If a call is made for transportation service, the coordinator assesses the request and transfer or refers the client to the most appropriate organization.

With a broader understanding of each transportation services in the region, each organization can also refer their clients to other transportation providers if they cannot accommodate the request. This does not require a lead organization and can be done by any of the partner organizations.

Dispatching and service delivery continue to occur at the individual transportation provider.

Advantages

Each transportation provider retains full independence without any major changes being witnessed by the customer. There is no major commitment to change required from any of the organizations. Transportation providers become more knowledgeable about each other, opportunities to share experience are identified and as familiarity and trust develops, the stage is set for greater coordination of services in the future (if warranted).

The other benefit is that there is greater access to information about all transportation services in place, both from clients/residents and each transportation provider.

Disadvantages

With Voluntary Cooperation, customers may find this model less responsive to their needs because the capacity or the quality of service is not increased.

Example

The ***Wellington Transportation Services*** in Ontario, provides a good example of this model and how it can evolve towards a more coordinated model. The Group is a collaborative network of community service providers in rural Wellington County who provide volunteer-based transportation services to residents. The Wellington Transportation Services provides central intake through a 1-800 number. Each participating agency operates under its own mandate, rules, and eligibility criteria based on the client's age, geography or level of disability. When new clients call, they are screened centrally and referred to the most appropriate agency. Registered clients call individual agencies directly for a trip. This process has reduced customer confusion and frustration and improved efficiency at the agency level. It also has reduced the number of inappropriate referrals to individual agencies.

Wellington Transportation Services also set out clear policies and procedures to ensure a consistent level of service delivery among all the service agencies. This involved standardizing how drivers deliver the service (i.e. level of assistance for clients) and overall driver training. They also share volunteer recruitment and training opportunities.

Applicability

This model makes sense when organizations wish to continue to operate under their mandate and retain full independence. It may well be the first step toward higher degrees of coordination in future.

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4.0 The Building Blocks of a Coordinated Transportation Model

Moving forward with a coordinated transportation model can have profound effects on the efficiency and effectiveness of existing transportation services. Resources can be more effectively shared to reduce direct costs and staff time and provide improved, seamless travel for rural residents.

The selection of the most appropriate model will need to be assessed by each potential partnership. The steps in doing this are outlined in **Chapter 5** of this report.

It is important to note that there is no one-sized fits all solution but rather opportunities to coordinate various transportation functions to create a successful model.

Within each model, there are various functions that form a part of transportation service delivery that can be coordinated. **Table 1** summarizes the functions that should be considered for coordination under each model.

Table 1 - Summary of Transportation Functions Applicable to Each Coordination Model

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 / Complaints Handling	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 and Training	1	3	3	3

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

Under certain models, the coordination of a transportation function is required, while under other models, it is preferred, optional or not applicable. For example, the coordination of service planning is required under Model 1 and 2, preferred under Model 3 and not applicable under Model 4.

The following chapter outlines some of the key building blocks that should be assessed when developing a coordinated transportation model. For each function, a description is provided as well as the potential benefits and requirements to ensure coordination is successful.

The ability and desire to coordinate each of these functions will need to be assessed when selecting a preferred coordinated transportation model. An assessment methodology is provided for each transportation function and should be used by the partnership to determine the cost/benefit of coordination and how it fits into the broader framework. This will help the partnership determine the level of coordination that is right for them.

4.1 Service Planning

Description

Service planning is an integral part of transportation service delivery. The goal of public transit is to provide an efficient and effective level of service for customers. This requires service design standards, an effective performance measurement system, and a systematic and continuous service evaluation methodology.

When planning service levels (routes or coverage, service hours, frequency, etc.), it is critical to understand the existing and future demands between origins and destinations and the capacity of existing vehicles and service levels to accommodate the demand. An understanding of the demographic makeup of the service area, where people are travelling, major origins and destinations, what time and day of the week they make their trips, etc. are important data requirements in service planning.

In a traditional approach, each transportation provider operates service in their own jurisdiction. Routes and services from adjacent providers may meet at the service boundary to facilitate transfers between systems; however, the passenger would be required to transfer to the adjacent system and pay a separate fare. This does not represent service integration.

Coordination Opportunity

Through coordination, organizations will establish a common goal of providing integrated service. This means providing seamless routes between jurisdictions, establishing timed transfers between different systems, or establishing common service hours between different transportation providers. Two approaches can be developed for this coordination:

1. The lead organization is responsible for conducting service planning for all partner organizations. This would mean setting service hours, routes, frequency and other policies and procedures. This approach is typically used in the Centralized Control Model and the Brokerage – Central Coordination Model.

2. Service providers and stakeholders in the partnership work together to establish an integrated service. This would allow two separate providers to enter into each other's territory to provide an integrated or seamless service and facilitate transfers between organizations. Another example is a transportation provider in the partnership working with a stakeholder in the partnership to establish a service that meets the needs of their clients. Funding is typically provided by the stakeholder to provide the service, however, the service benefits all members of the community, not just the stakeholders clients. This approach is typically used in the Brokerage – Central Coordination Model and the Brokerage – Confirmation Based Model.

Benefits

There are a number of benefits to coordinating service planning:

1. Allows for seamless cross-boundary travel and minimizes the need for customers to transfer between services.
2. Avoids duplication of service.
3. Facilitates a greater degree of coordination and therefore the ability to increase the utilization of vehicle trips.

Challenges

1. Perception that integration is taking ridership away from the local transportation provider.
2. Agreement on appropriate service levels.

Requirements

1. Agreement between existing service providers to establish a seamless network.

Costs

1. Staff costs to set up the process.

Applicable Coordination Models

1. Model 1: Central Control (Required)
2. Model 2: Brokerage – Central Coordination (Required)
3. Model 3: Brokerage – Confirmation Based (Preferred)

Assessment Methodology – Service Planning Process

The following steps should be followed to determine the potential benefit of and the ability to coordinate the service planning process. This will feed into the decision making process about the type of model to select.

Steps in the Process	Comments
1. Determine demand between the jurisdiction of different transportation service providers	Review existing travel and requests for travel between different service areas covered by different transportation providers. This can be done by going through existing travel logs and recording passenger requests for service. If a transportation master plan has been completed by the municipality, this provides a good tool to understand latent demand. Where insufficient information is not available from the above tasks, conduct a survey of existing passengers to assess the demand for travel between different jurisdictions.
2. Determine latent demand between different jurisdictions	Assess the level of population growth and demographic shifts (typically available through the municipality). Use this to determine potential growth in demand between jurisdictions identified in the previous step.
3. Determine overlapping eligibility	For demand responsive services, determine the number of clients that are registered to multiple transportation providers in the same jurisdiction. Where there is significant overlap, service planning integration will be more effective.
4. Determine potential to standardize service hours	Review existing service hours and assess whether it makes sense to standardize. This allows seamless integration during all hours.
5. Work through cost and revenue sharing arrangement	Work with transportation providers to develop a cost and revenue sharing agreement. There are various forms of cost-sharing agreements that can be examined depending on the type of service provided. For demand responsive services, an agreement is typically made for the transportation provider that is carrying a passenger from another organization to invoice the organization per trip made or kilometre of travel. For fixed route services, the service plan can be adjusted so there is equity in operating costs and revenue potential (e.g. two transportation providers would alternate runs along a corridor so they are each incurring similar costs and revenue potential).

4.2 Customer Service and Complaint Handling

Description

When providing transportation services, each organization is required to have staff to answer inquiries and address complaints. For demand responsive services, this function is often performed by the transportation coordinator (dispatcher) or intake coordinator. Each organization is required to look after its own customer service function.

Coordination Opportunity

Through coordination, organizations can partner to develop a central referral point for customer service and complaint handling. This works well when centralized marketing and awareness has been implemented as well as centralized scheduling and dispatching (for demand responsive services). Residents are able to call one central number in order to have their questions answered and complaints heard and addressed. This would require a lead organization to be knowledgeable about the operations of each partner organization and only works where there is a higher degree of coordination (Model 1 and 2). Without coordination, each organization would be required to provide their own customer service.

Benefits

There are a number of benefits to coordinating customer service:

1. One number to call for clients – reduces confusion about who to call.
2. Potential to reduce the number and/or time allocated to individual customer service staff required to respond to inquiries and complaints.
3. This is a natural fit where marketing, intake and/or reservation dispatch functions are coordinated.
4. Allows individual organizations to more cost effectively meet customer service related AODA requirements by working together.

Challenges

1. Partners that have existing staff that provide these functions may need to find an alternative role in the organization.
2. The lead organization may not have a full appreciation of the operations of each partner organization, particularly in both Brokerage Models (Model 2 and 3).
3. May dilute information about other services an organization provides by taking away the initial point of contact with the organization.
4. Customer service staff may still be required for other services provided by an organization, reducing any potential cost savings.
5. Unionized places of work, with transportation elements, may object to the coordination of this function, particularly if it means a reduction in number of overall customer service staff.

Requirements

1. The coordinated partnership establishes a common phone number to call for transportation services. This may require the set-up of a 1-800 number in case the partnership extends into a large geography that now requires some clients to call long-distance.
2. A centralized customer service coordinator(s) position is established and training is provided on the service provisions for each partner organization.

3. Common policies and procedures are established where there are multiple transportation providers operating the service.

Costs

1. Set-up and fees for a 1-800 number (if required).
2. Salary for customer service staff (this typically results in a reduction in total number of person hours dedicated to this task by all the partners).

Applicable Coordination Models

1. Model 1: Central Control (Required)
2. Model 2: Brokerage – Central Coordination (Required)
3. Model 3: Brokerage – Confirmation Based (Preferred)
4. Model 4: Voluntary Cooperation (Optional)

Assessment Methodology – Customer Service and Complaint Handling

The following steps should be followed to determine the potential benefit of and the ability to coordinate the customer service and complaint handling process. This will feed into the decision making process about the type of model to select.

Steps in the Process	Comments
1. **Identify the daily call volume each partner organization receives for information and complaints**	If detailed records are not kept, each organization should conduct a 2-3 week call log which outlines: a.) number of calls answered; b.) purpose of the call; c.) time spent answering the call. Determine the total time spent for each organization responding to customer calls.
2. Forecast potential future calls	Determine ratio of calls per passenger for each organization. Multiply the ratio by forecasted future demand over a 5-10 year period to determine growth in calls.
3. Identify number of staff involved in the customer service function and percent of their time dedicated to this task.	Review existing staff roles and identify opportunity for role re-alignment, some certain staff shifting to the central office and other staff finding other roles within their local organization.

Steps in the Process	Comments
4. Assess potential for efficiency gains and determine the number of customer service staff required under the coordination model	Forecast reduction in number of calls or time spent on calls as a result of coordination. Factors include the use of new software, efficiencies gained through dedicated staff roles, reduction in client confusion about who to call due to marketing improvements, reduction in calls due to improved service levels. Depends on percent of time each existing customer service staff member spends on addressing customer service, the ability to reduce client confusion about who to call. Assume an efficiency factor of 15 to 25%. Combine time spent by each individual organization and calculate the number of staff required.
5. Identify cost sharing arrangement	Cost sharing agreement needs to be equitable and take into account potential for future expansion. This could be based on the percent of ridership delivered by each of the transportation providers or registrants that each organization represents. A growth factor should also be developed and revisited every few years.

4.3 Intake Process

Description

Where a determination of eligibility is required for clients to access a transportation service, each organization will have established an intake process for the registration of new clients. In this process, a new client (or a family member) that requires transportation services contacts the organization and requests to be registered under that service.

Under the status quo, potential clients may have to call multiple organizations to determine which transportation services they are eligible to use. Each organization consumes staff resources to develop and update an appropriate eligibility guideline and application form, receive calls, review applications to register clients for their service, and handle any complaints or appeals.

Coordination Opportunity

Through coordination, organizations can have one central point of contact where all residents can call to receive information and register for a transportation service. This is usually done by establishing a common phone number (and web site) for potential clients. Two approaches can be developed for this coordination opportunity:

1. The lead intake coordinator provides information and high level screening for all client contacts then refers the clients to the correct partner organization for final determination of eligibility and processing.
2. The lead intake coordinator enters into an agreement with all participating organizations to provide the information and screening, and also conducts the eligibility review and registration process on behalf of the partner organizations. If approved, the completed application is sent to the appropriate partner organization(s) to enter into their system (Model 2 and 3). An independent complaint handling and appeal process can be set up if desired by the participating organizations.

Benefits

There are a number of benefits to coordinating the intake process for several transportation providers:

1. Only one number to call for all clients to register for transportation services. This reduces confusion about who to call and can reduce client wait times.
2. Can reduce the number of inappropriate referrals and free up local organization staff time to perform other functions.
3. Can reduce the total staff time dedicated to intake for all partners by grouping the activity into one efficient unit.
4. Ability to develop more specialized staff, cover off vacations/sickness and benefit from economies of scale.
5. Allows individual organizations to more cost effectively meet eligibility and client registration related AODA requirements by working together.

Challenges

1. Organizations that use the intake process to register clients for multiple services beyond transportation. This approach may dilute information about other services an organization provides by taking away the initial point of contact with the organization during registration.

Requirements

1. The coordinated partnership establishes a common phone number and website for clients to register for transportation services. This may require the set-up of a 1-800 number in case the partnership extends into a large geography that now requires some clients to call long-distance. This is the same phone number and website used for client scheduling/dispatch, marketing/awareness and customer service.
2. A centralized intake coordinator(s) position is established and training is provided on the eligibility criteria and application process for each partner organization. Depending on the structure, the coordinator would ask callers three to four clarifying questions pertinent to the eligibility criteria of each partner organization (e.g. What is your age? Where do you live? Do

you have a disability that limits your ability to travel?). Through this initial screening, the intake coordinator could identify which partner organizations an applicant may be eligible to receive transportation services from and then:

   a. Transfer the applicant to the appropriate partnering organization(s); and/or
   b. Provide them the application form and any additional information about the potentially eligible transportation services; and/or
   c. Take them through the entire eligibility review and approval process for each potential partner organization.

3. Where the intake coordinator completes the application review and intake on behalf of partner organizations, information is transferred to the partner organization that the applicant applied for, whether they are eligible for service or not.

Costs

1. Set-up and fees for a 1-800 number (if required) and website. This is the same cost as identified in the customer service, marketing/awareness and scheduling/dispatch functions.
2. Centralized intake coordinator position(s) and back-up. This may be an overall cost savings to the coordinated partnership if multiple local intake positions are no longer required.
3. Marketing and communications of the new centralized number for residents to apply to the transportation service. Websites of various partners can be linked to a centralized intake process. This is the same cost as identified in the customer service, marketing/awareness and scheduling/dispatch functions.

Applicable Coordination Models

1. Model 1: Central Control (Required)
2. Model 2: Brokerage – Central Coordination (Preferred)
3. Model 3: Brokerage – Confirmation Based (Preferred)

Assessment Methodology – Intake Process

The following steps should be followed to determine the potential benefit of and the ability to coordinate the intake process. This will feed into the decision making process about the type of model to select.

Steps in the Process	Comments
1. Assess the number of monthly applications received by each member of the partnership and the length of time required to provide transportation information and assess each application	Total the number of staff positions and percent of their time spent on performing this function for each organization. For example: • Organization A: Staff 1 - 50% of time on client intake • Organization B: Staff 1 - 20% of time on client intake • Organization C: Staff 1 - 100% of time on client intake; Staff 2 - 50% of time on client intake
2. Forecast Future Demand for service	Calculate existing registrants per capita and forecast future potential growth based on population growth and changing demographics.
3. Review eligibility criteria and assess the similarities	Time should be spent on standardizing where possible the eligibility criteria to provide clients with more options for service. This simplifies the application process and reduces time spent by the intake coordinator to process multiple applications for each service. A centralized intake process has more value where the eligibility criteria between partner organizations is the same or similar.
4. Determine number of clients that are registered for multiple transportation providers	A centralized intake process has more value where at least 20 to 30 percent of clients are registered in multiple agencies.
5. Determine if the intake process is for transportation services only or includes other services provided by the organization not related to transportation	It may be difficult to establish a centralized transportation intake process for organizations that require clients to register for all services they provide (e.g. client also registered for meals on wheels, adult day programs, etc.). A central intake coordinator can still be used for initial screening and to refer clients to the applicable organization within the partnership.
6. Determine if there will be any staff time savings as a result of the coordinated structure	Take into account the number of part-time positions from multiple partner organizations that can be combined and reduction in time through a common eligibility form (one application can now register a client for multiple agencies).
7. Identify cost sharing arrangement	Cost sharing agreement needs to be equitable and take into account potential for future expansion. A formula that combines percent of registrants and average calls made per day (Step 1) may be suitable. A growth factor based on Step 2 should also be developed and revisited every few years.

4.4 Marketing / Awareness

Description

Marketing and awareness is about providing information to riders that use the service and for attracting new customers. Marketing budgets for community transportation organizations are typically limited and rely on a website, promotion at community events, advertising on vehicles and word of mouth.

Where there are multiple transportation services operating independently within a region, residents may not have a full understanding of the services that are available to them.

Coordination Opportunity

Through coordination, organizations can partner to develop and promote a central 'brand' for all transportation services. This includes a centralized marketing and public awareness campaign that will help increase client awareness on how to access transportation services within the county/region. Typically, there is one brand established for transportation services and one number that clients can call for transportation information and solutions. Without coordination each transportation provider would be required to advertise and promote their service on their own.

In order for this approach to be successful, it must be a joint initiative among all partner organizations. While each partner within the coordinated framework can maintain their brand presence for other services they provide and identify themselves as 'partners' in the coordinated framework, the coordinated transportation service provided by the partnership would have a distinctly identifiable brand. The coordinated framework should be marketed as a 'one-stop-shop' to meet the transportation needs of the community. An emphasis should be placed on the ease of use of the system.

Benefits

There are a number of benefits to coordinating the marketing and communications process and creating a central brand for the coordinated transportation framework:

1. Increases the effectiveness of marketing and communication spending by pooling resources into one combined message (extends the reach).
2. Builds a stronger identity for rural transportation in the community, which can potentially be used to attract additional funding sources.
3. Improves the client's ability to find appropriate transportation services (one brand becomes synonymous with transportation services in the county/region).

Challenges

1. Changing the mindset of existing clients so they are aware of the new brand and feel their needs will continue to be satisfied.
2. Initial up-front costs to create the brand and communicate it to the community.

Requirements

1. Some initial funding is required to develop a 'brand' (name and logo) and marketing/communications plan for the coordinated framework. Input and consensus will need to be achieved by the partnership.
2. A new website and central telephone number will also be required as a central point of contact and information. The new brand needs to be communicated to existing clients and the community in general. Local media should be used as much as possible.

Costs

1. Set-up and fees for a 1-800 number (if required) and website. This is the same cost as identified in the customer service, intake and scheduling/dispatch functions.
2. Obtain specialist assistance to help create the brand and a marketing/communications strategy. This includes name, logo, brand position.
3. Develop website and communications materials using the new centralized brand.
4. Brand vehicles owned by the partner organizations with the new logo (paint or decal). The original brand/sponsorship logo can also be maintained.
5. Local media releases and participation in community events.

Applicable Coordination Models

1. Model 1: Central Control (Required)
2. Model 2: Brokerage – Central Coordination (Required)
3. Model 3: Brokerage – Confirmation Based (Preferred)
4. Model 4: Voluntary Cooperation (Optional)

Assessment Methodology- Marketing and Awareness

The following steps should be followed to determine the potential benefit of and the ability to coordinate marketing and awareness. This will feed into the decision making process about the type of model to select.

Steps in the Process	Comments
1. Assess the visibility of the coordinated framework for existing and new clients/customers	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.
2. Review existing marketing /communications budgets to determine potential to pool resources	Review how budgets are currently being spent. Assess whether there is a benefit to consolidate and better communicate the objectives of the transportation service.
3. Develop potential brand that reflects entire community and seek sponsorship opportunities	Having a recognizable community-wide brand may encourage various retailers, local businesses and service clubs to financially support the overall objectives of the partnership.

Steps in the Process	Comments
4. Identify cost sharing arrangement	Cost sharing agreement needs to be in place. This could be based on the accumulation of existing marketing budgets currently in place. Where additional funds are required, a formula based on percent of ridership or passenger revenue should be reviewed.

4.5 Scheduling and Dispatch

Description

For demand responsive transportation services, one of the highest potentials to coordinate service is through a shared reservation / dispatch function.

Reservations occur when registered clients call or email a main office to book a trip. Each transportation provider may have different requirements for trip booking, including minimum reservation window, the ability to book subscription trips and customer service hours.

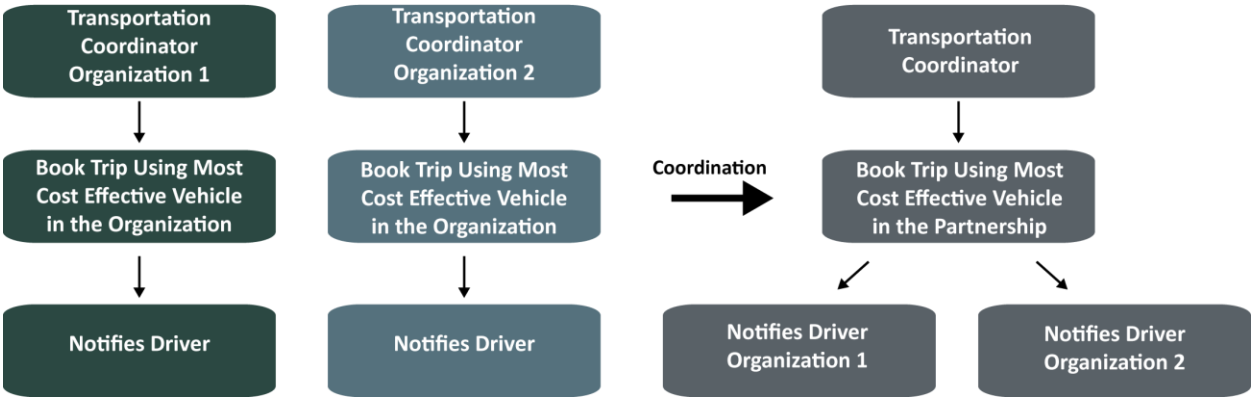
Once a trip is requested, the reservationist/dispatcher (also referred to as a transportation coordinator) will identify whether there is availability in the existing fleet or with a volunteer driver to accommodate the trip. If there is availability, the trip is booked, scheduled and dispatched with the trip details communicated to the driver.

Without coordination, each transportation provider uses its own transportation coordinator(s) to book and dispatch trips using volunteer or paid drivers.

Coordination Opportunity

Through coordination, organizations can consolidate the reservation / dispatch function into one central unit with one telephone number and website for all clients to book a service. The reservationist/dispatcher (transportation coordinator) has access to all vehicles and volunteer drivers in the system to book trips. This increases the pool of resources available to clients and also increases the opportunity to enhance transportation productivity (increase the number of passengers per vehicle hour of service).

Centralized Scheduling and Dispatch



With a greater number of clients calling a centralized scheduling and dispatch system, the cost effectiveness of purchasing a scheduling software program also increases. A scheduling software package has several proven benefits such as reducing dispatch time requirements, matching clients with volunteers and drivers, as well as coordinating trips, trip optimization and thereby increasing overall service capacity and overall service efficiencies.

A central scheduling system database will also collect, process and disseminate comprehensive information about the client for billing, monitoring and reporting purposes. The system should include a centralized inventory of all vehicles, including passenger capacity and accessibility features; as well as client information, including age, level of disability, emergency contacts and location of residence. Trip performance standards are established, such as maximum client travel times when trips are coordinated. A central scheduling system also provides a common statistical tracking tool so that each partner in the coordinated framework can maintain up-to-date information on their clients' trip patterns.

Utilizing technology to coordinate trips, manage information and enhance customer service is paramount to the success of a demand responsive coordinated transportation framework. Investments in registration and scheduling technology can improve efficiency of services by allowing more shared trips to be made and utilizing a network of vehicles across a large service area to provide access to transportation services. Successful applications can achieve increased vehicle occupancy by as much as 20 percent.

The decision to move forward with a scheduling package is complex. The real benefit of scheduling software is the ability to better coordinate trips. This increases the number of shared rides and improves overall capacity. Scheduling software will also allow the lead transportation coordinator to better match client needs with appropriate vehicles/volunteers and manage trip data.

Scheduling software packages typically become useful when the transportation coordinator is scheduling more than 40 trips daily. There are basic scheduling software alternatives that can be used with no up-front fee and a monthly licensing fee between $400 to $600 monthly. This provides a cost effective alternative to scheduling trips by hand.

As the demand for trips grows (200 or more daily trips), a more robust program is required that offers automatic scheduling as well as other features of interest. Cost is the major barrier to purchasing a scheduling software package. Potential costs include the purchasing of software (approximately $100,000 to 200,000 depending on number of trips and vehicles), cost of the license(s), installation fees and the cost of training employees.

The need for scheduling software will have to be assessed by the partnership, but manually or automated; a centralized reservation/dispatch system is often a high payback coordination strategy.

Benefits

1. One number to call for clients to book trips – reduces confusion about who to call.
2. Greater access to vehicles and pool of volunteer drivers increases the potential to share rides.
3. Potential to reduce the number or time allocation for individual agency transportation coordinators required to book the service.
4. Pooled resources will increase number of trips. This can be used as a justification to purchase a scheduling and dispatch software program.
5. Use of a centralized dispatch software to better coordinate trips among multiple agencies.
6. Can reduce need for volunteers by accommodating more demand using existing resources.

Challenges

1. There can be significant time and resources required to set up a centralized reservation and dispatch office.
2. Partners that have existing staff that provide these functions may need to find an alternative role in the organization.
3. Existing users may be adverse to any changes.
4. Unionized places of work, with transportation elements, may object to the coordination of this function, particularly if it means a reduction in number of overall reservation/dispatch staff.

Requirements

1. Centralized scheduling and dispatch will require a careful review of the processes of each participating transportation provider and a cost benefit assessment of proceeding with a scheduling software package. If there is a municipal public transit system within the region or in an adjacent region, then the partnership should check whether that system has a scheduling software program (typically for its paratransit service) that might be expanded to meet the needs of the partnership.

Once a decision is made on using a manual versus automated scheduling and dispatch system, the partnership must decide on whether a lead organization or a new entity will be used to deliver the service. Significant effort will then be required to merge databases and train staff.

Costs (General)

1. Set-up and fees for a 1-800 number (if required) and website. This is the same cost as identified in the customer service, intake and marketing/awareness functions.
2. Office space required set up the reservation/dispatch function (often provided in kind by one of the member organizations).
3. Office furniture, supplies and computer equipment.
4. Salary for transportation coordinator(s) (this typically results in a reduction in total number of person hours dedicated to this task by all the partners).
5. Labour to set-up common database and transfer pertinent client information to a common database (e.g. eligibility, travel requirements, need for attendant).

Costs (Scheduling Software Program)

1. One-time cost to purchase the program (or arrange usage with existing transit operator).
2. Annual licensing fees or user fees.
3. Mobile data terminals for each vehicle (to provide real-time schedule information to drivers).

Applicable Coordination Models

1. Model 1: Central Control (Required)
2. Model 2: Brokerage – Central Coordination (Required)
3. Model 3: Brokerage – Confirmation Based (Preferred)

Assessment Methodology – Scheduling and Dispatch

The following steps should be followed to determine the potential benefit of and the ability to coordinate the scheduling and dispatch process. This will feed into the decision making process about the type of model to select.

Steps in the Process	Comments
1. Identify the number of daily accommodated trips, average passengers per trip and unaccommodated trips for all organizations involved in the partnership. Separate volunteer transportation versus agency provided transportation	If detailed records are not kept, each transportation provider should conduct a 2-3 week travel log which outlines: a.) number of vehicles in service and hours of service; b.) trip requests; c.) trips accommodated and not accommodated; d.) type of vehicle used (volunteer or paid driver); e.) vehicle occupancy.

Steps in the Process	Comments
2. Forecast future travel demand for each transportation provider	Assess the level of population growth and demographic shifts (typically available through the municipality). Calculate growth using a factor of trips per registrant. Determine any potential increases as a result of change in eligibility criteria and service levels. Use this to determine change in trips per registrant or registrants per capita.
3. Identify number of staff involved in the reservation/dispatch function and percent of their time dedicated to this task	Identify the potential to reduce the number of staff hours for transportation coordinators. For example, if there are 3 local coordinators dedicated 80 percent to reservation/dispatch, there may be opportunity to merge this function into 2 positions dedicated 100 percent and working out of the central office. The staff saving of 40% may be used for other needs in the local agencies.
4. Assess percent of trips provided by volunteer drivers and their willingness to pick up multiple passengers at separate origins and drop them off at different destination	Volunteer drivers may not be willing to pick-up and drop off multiple clients. Also, their vehicles have a lower capacity (up to 3 persons), therefore, the ability to increase vehicle occupancy is less. Need to assess the willingness of existing volunteers to carry multiple clients per trip. If there is a willingness, then volunteer trips can be included as part of the decision process for purchasing a scheduling software package.
5. Assess manual reservation and dispatch system	If the volume of trips is too small or the software costs too high, then coordination of a manual system may still be an appropriate strategy. Review the systems in place at each agency then adopt a lead agency to handle this task for the partnership.
6. Determine the feasibility of purchasing a scheduling software package	There are several different scheduling software packages on the market. A simple GIS based package with limited options becomes feasible when the partnership is booking 30 to 100 daily trips. More advanced scheduling software programs are required when booking over 100 to 200 daily trips with a larger fleet of vehicles. Vendors will be eager to assist with the partnership's assessment. A nearby public transit system may be operating with a software package which can be used by the partnership. If not, some third party advice may be sought to assist with the procurement decision.

Steps in the Process	Comments
7. Identify cost sharing arrangement	Cost sharing agreement needs to be in place. Identify grants or one-time funds to help pay for the start-up costs (office space, purchase of scheduling software package and equipment if warranted). If not available, this will need to come from existing funding received by the partnership. A funding formula for ongoing transportation coordinator and licensing fees should be based on an agreed to formula which incorporates percent of existing ridership and anticipated level of growth within each of the partner organizations.

4.6 Passenger Fares

Description

Each organization has a set fare for the service it provides and this fare may vary from one organization to another. Fares may be set for different categories such as Adults, Children, Seniors and Families; one organization may charge a flat rate for a trip, while another organization may charge a per km rate and some organizations will have a wait time charge. If a client is eligible for transportation from multiple organizations, these variations can allow the client to select the transportation provider that offers the cheaper price instead of the organization that makes the most sense for the entire network.

In cases where a fixed route transit service is part of the coordination partnership, there will be specific issues related to fare integration. Such systems are usually fully open to the public and operate with a flat rate fare structure including free transfer between routes. If a fixed route system is part of the rural integration partnership, it will be important for customers to be able to easily transfer between the two services. If there is a fixed route service in an adjacent municipality that is not part of the partnership, it will still be important to maximize the convenience of passengers transferring to and from these services.

Within the rural area, there will typically be several demand responsive services, therefore, it is important to consider how to best coordinate these systems for efficient trip making. When coordination with a fixed route service is added to the mix, the service planning and operational integration with the coordinated demand responsive services must also be considered.

Coordination Opportunity

Through coordination, partner organizations can develop standard fare rates to ensure that customers are charged the same fare for a trip, no matter which service provider they use. A common goal would be that a client will receive a similar level of service at a similar fare (or rate). This promotes equity in the service and increases customers' understanding of the coordinated framework. Clients are no longer able to bargain between different service providers to find the best price, as the cost for a trip is the

same regardless of which organization vehicle is being used. Service can then be better planned by central dispatch.

To achieve a common fare, some organizations would need to increase their fares while others may have to lower fares. A common fare schedule could be set to be 'revenue neutral' (the total passenger revenue currently received by all agencies remains the same, despite changes in specific categories) and should take into account deadheading costs. As a guideline, the partnership should try to agree on what is a reasonable percentage of operating costs that should be recovered from passenger fares. Then translate this to a common fare schedule. For shorter trips within a region, a flat fare may be appropriate while for long trips and inter-regional travel, a fare by distance formula should be considered along with a wait time charge for demand responsive services. If particular partner organizations wish to subsidize fares for specific groups of clients, this subsidy should be treated as equivalent fare revenue.

Since some transportation providers may be required to raise their fares to the agreed upon rate, the result may be increased fees for some clients. To reduce any negative backlash that this may cause, the partnership must emphasize the improved efficiency and reliability of the service to clients.

In cases where a fixed route service forms part of the partnership, the key goal is to have the customers move seamlessly between demand responsive and fixed route services. Developing a sustainable fixed route service should be a common goal as it will be open to the public and able to serve a full spectrum of travel needs without being limited to target client groups or trip purposes. Fixed route service also means costs are fixed once the service level (weekly hours of operation) is set. Hence, increasing ridership by accommodating clients from demand responsive services for some or all of their trips will improve overall rural transportation productivity.

Benefits

1. Clients pay the same fare for similar service level, regardless of the provider they use.
2. Promotes equity and clients cannot 'work the system' to obtain a cheaper price.
3. May reduce costs for some clients, however, may increase costs for other clients.
4. May support greater efficiency overall by guiding some clients to utilize existing fixed route services.
5. Allows individual organizations to more cost effectively meet fare and fare media related AODA requirements by working together.

Challenges

1. Establishing a reasonable target for passenger revenue as a percentage of operating costs and translating this to a common fare schedule.
2. Providing subsidies for clients with affordability issues (fare subsidy levels can be tied to household income).

3. Ensuring drivers are not required to handle cash and are not subject to fare disputes with passengers.
4. Developing a revenue sharing arrangement if a comment fare cannot be agreed to.
5. Developing a transfer mechanism so clients can move easily to/from fixed route services.
6. Integrating service levels between demand responsive and fixed route services and finding appropriate transfer points.
7. Addressing Accessibility for Ontarians with Disabilities Act fare equity requirements when coordinating with a public transit operator that provides a fixed route transit service.

Requirements

1. Conduct a review of fare schedules and policies for all partners and adopt a standardized fare structure for local and long distance trips. Develop common policies for prepayment, no shows and penalties for fare abuse. Develop an open, transparent and consistent approach to fare subsidies.
2. If fixed route services are part of the coordination partnership, conduct a review of service levels, routing and stop locations, transfer policies and fare payment strategies. Staff of fixed route service will typically have operational and service planning expertise that can benefit the partnership.

Costs

1. Aside from the staff time to develop a common fare structure and policies, there should be little cost for this initiative.

Applicable Coordination Models

1. Model 1: Central Control (Required)
2. Model 2: Brokerage – Central Coordination (Required)
3. Model 3: Brokerage – Confirmation Based (Preferred)
4. Model 4: Voluntary Cooperation (Optional)

Assessment Methodology – Passenger Fares

The following steps should be followed to determine the potential benefit of and the ability to standardize passenger fares. This will feed into the decision making process about the type of model to select.

Steps in the Process	Comments
1. Review fare schedules and policies of each partner organization	Assemble information in a common format for each partner organization: fare categories, fare levels, any subsidies, wait time charges, etc.

Steps in the Process	Comments
2. If Model 1 is pursued, agree on a 'reasonable' percentage of operating costs to be recovered from passenger fares	While each transportation provider has differing costs structures, the total operating costs for transportation of all partners can be estimated and a reasonable percentage agreed for appropriate passenger contribution (e.g. 30% for short trips, 50% for long distance trips).
3. Set a common fare schedule	Typically, a flat fare with an Adult rate and possibly separate rates for seniors, students, children should be set for in-town trips. Try to keep it simple. A common per kilometre rate should also be found for long-distance trips that use this fare structure formula. Wait time charges should also be standardized where applicable.
4. Agree on common policies	Policies related to annual adjustment of fares (by COI), prepayment, no show penalty, fare for attendant required by client, etc.
5. If a fixed route service is part of the coordination partnership, then review fare schedules, fare handling and transfer policies	Develop arrangements with the fixed route service provider that maximize user convenience and facilitate transfers to/from the demand responsive services.
6. Identify process for revenue sharing and invoicing	Revenue sharing agreements where there is service integration should be in place. For demand responsive service (Model 2 and 3), this may be through invoices sent by the transportation coordinator for trips delivered by another client. For fixed route services, the partners should explore a policy of accepting transfers from cross boundary systems, therefore allowing for seamless travel.

4.7 Eligibility Criteria

Description

Each demand responsive transportation provider will have its own eligibility criteria that outlines who can use their service. In some cases, the service will be open to everyone. In other cases, specific criteria are outlined on who can use the service. Where eligibility is required, service is often restricted to seniors and/or persons with disabilities. The definition of each of these can also vary from one organization to the next. The definition of a senior could range from the age 60 to 65. A person with a disability could include persons with a physical disability, a cogitative disability, etc. For municipally operated demand responsive services, the eligibility is typically based on whether the person's disability prevents them from using conventional transportation services.

In the status quo situation, all demand responsive service providers have their own eligibility criteria and operate independently of one another.

Coordination Opportunity

Through coordination, demand responsive transportation providers can work together to develop common eligibility criteria to make coordinated delivery effective (e.g. it will then be easier to group clients from multiple agencies in a shared vehicle trip). On the other hand, differences in eligibility criteria between partner organizations will reduce the overall effectiveness of a coordinated framework, as transportation coordinators may be limited in their ability to coordinate and share rides. For example, if only a few transportation providers consider children as eligible for a trip, the central transportation coordinator will be limited in the number of partners or vehicles that will be able to provide trips for this population group (e.g. unable to dispatch organization "A" vehicle for a trip involving a family because the organization's mandate is limited to adults/seniors). Where common eligibility criteria cannot be reached, the partnership should strive to reach an agreement that allows each transportation provider to deliver trips from all eligible clients in the partnership, irrespective of their own eligibility criteria.

Benefits

1. Can increase total ridership on existing services.
2. Can increase efficiency and effectiveness of the service as multiple clients groups may be available to share a ride.
3. Can improve the mobility of certain groups by increasing the number of service options available to them.
4. Allows individual organizations to more cost effectively meet eligibility related AODA requirements by working together.

Challenges

1. Transportation providers may have different mandates and funding policies so that it is difficult to develop a common set of eligibility criteria.
2. Different eligibility criteria can create confusion and reduce the overall effectiveness of a coordinated framework.
3. Transportation Coordinators may be limited in their ability to coordinate and share rides.
4. Some existing clients may feel their 'exclusive' travel option will have a decreased service level.
5. Municipal transportation service will be required to adhere to the eligibility framework noted in the Accessibility for Ontarians with Disabilities Act Integrated Accessibility Regulation. For coordination of eligibility criteria to occur, all transportation providers in the partnership may have to abide by this standard.

Requirements

1. Conduct a review of the eligibility criteria of all members of the partnership and work towards standardizing as much as possible. Discretion must be left with individual partners to continue

to serve specific clients only (clients dictated by funding policy, deemed a source of revenue or having special needs).

Costs

1. Aside from staff time and some training and communications materials, standardizing eligibility should not incur significant costs.

Applicable Coordination Models

1. Model 1: Central Control (Required)
2. Model 2: Brokerage – Central Coordination (Preferred)
3. Model 3: Brokerage – Confirmation Based (Optional)
4. Model 4: Voluntary Cooperation (Optional)

Assessment Methodology – Eligibility Criteria

The following steps should be followed to determine the potential benefit of and the ability to standardize eligibility criteria. This will feed into the decision making process about the type of model to select.

Steps in the Process	Comments
1. Review mandate and eligibility criteria of each partner	Assemble eligibility information in a common format for each transportation provider and determine flexibility to make adjustments. Clarify whether any funding policies limit the ability to extend eligibility criteria to other groups. Identify any AODA requirements of any partners that are not flexible.
2. Assess the similarities and differences in eligibility criteria	Determine where eligibility criteria are the same and carry forward these criteria under the coordinated structure. If there are differences in eligibility criteria, discuss whether or not wording can be modified to accommodate some or all partners.
3. Work together to agree on a common set of eligibility criteria	Identify common eligibility criteria that will meet the needs of all partners involved. Where unanimity is not possible, clearly define the exceptions including the ability for transportation providers to deliver passengers from partner organizations that do not meet their own eligibility criteria.
4. Estimate potential new demand for service	If changes to eligibility criteria are made, ensure that resources exist to accommodate existing and potential growth in clients with a reasonable service level. This should form part of the service planning assessment.

4.8 Policies and Procedures

Description

Each transportation provider has their own set of standard policies and procedures that they adhere to when providing transportation service. Policies and procedures can cover a wide variety of topics (i.e. driver training, attendant policies, wait time policies, no show penalties, etc.). Without coordination, clients who are registered under a number of services may be confused on the appropriate policies or procedures if they use multiple services.

Coordination Opportunity

Through coordination, organizations can share best and common practices, stay current with legislation and ensure that customers have the same travel experience regardless of the provider they use. Standard policies should include risk management, driver training, attendant policies, level of service and assistance, emergency response, vehicle breakdown, etc. This creates a situation where best practices can be shared among participating agencies and implemented as part of a coordinated framework. It also provides the client with an assurance of a consistent level of service and expectations, no matter which service provider is actually delivering the service.

Benefits

1. Ability to provide more effective service by sharing experiences and best practices between transportation providers.
2. Clients know they will receive the same service regardless of the provider they use.
3. Moving to common policies generally means adopting higher standards which improves safety and efficiency.
4. Provides an opportunity to update and streamline policies.

Challenges

1. Staff may find change difficult even with training.
2. Care must be taken to do a cost benefit assessment and not simply adopt the most stringent (expensive) standards/polices.

Requirements

1. A group will need to be established in order to determine the policies and procedures that can be standardized. This will require a thorough review of each organizations policies and procedures and discussion on which best practices to adopt. The group will need to develop a common Policies and Procedures Manual and a set of operational policies related to transportation for the Coordinated Framework.

Costs

1. This activity can be very intensive for staff, especially in cases where policies and procedures have not been updated for a significant time.

Applicable Coordination Models

1. Model 1: Central Control (Required)
2. Model 2: Brokerage – Central Coordination (Preferred)
3. Model 3: Brokerage – Confirmation Based (Preferred)
4. Model 4: Voluntary Cooperation (Optional)

Assessment Methodology – Policies and Procedures

The following steps should be followed to determine the potential benefit of and the ability to standardize policies and procedures. This will feed into the decision making process about the type of model to select.

Steps in the Process	Comments
1. Assemble current policies and procedures by topic area for each organization	Basic categories should include policies and procedures that are visible to the customer and those that are more pertinent to staff (e.g. drivers).
2. Research best practices in the topic area and legislative requirements	Conduct research and check with other organizations to see common policies and procedures being applied throughout Ontario. Check any legislative requirements that may apply (e.g. AODA Integrated standard).
3. Work through a single example to determine that the group effort is justified	Start with something important but relatively simple to test process (e.g. driver training requirements) to ensure common policies and procedures can be achieved.
4. Repeat process for additional topics	Work through the entire individual topic areas and add new topics where required.
5. Document agreed policies/standards	Produce documentation of agreed upon policies and procedures including any exceptions.
6. Set up a process for monitoring and periodic updates	Agree to review the document every two years to ensure applicability.

4.9 Vehicle Purchase

Description

Typically many different transportation providers will purchase (or lease) their own vehicles to deliver transportation services. For specialized vehicles (e.g. heavy duty buses), these are typically ordered through a bus manufacturer. The transportation provider will identify the vehicle specifications they

would like to see and place an order for the number of vehicles required. In certain cases, a vehicle inspection is completed before delivery of the vehicle.

One of the challenges is that not all mobility devices can be accommodated on all accessible vehicle types. Certain vehicles are designed with rear-access ramps while others have a side access lift. The width of the ramps and lifts as well as the space inside the vehicle can vary. This is problematic for persons with obesity issues (where heavy weights can prevent the driver from pushing the chair up the ramp, or the width of the mobility device cannot be accommodated on the ramp, lift or inside the vehicle).

Coordination Opportunity

Through coordination, standard criteria for vehicle purchases can be developed with a focus on vehicle specifications, such as the amount of space required and lift capabilities required to accommodate mobility devices. Standardizing this process can increase the availability of fleet to all passengers.

It may also allow the partnership to employ some expertise in vehicle procurement. This person would be responsible for developed the standard criteria, identifying the most cost effective vehicle manufacturer (sometimes through a competitive bid process) and inspecting the fleet before delivery. When part of a larger consortium (e.g. Metrolinx's Joint Vehicle Procurement Program), preferred pricing of new fleet may also be obtained.

Different models of coordination promote different practices for vehicle ownership and sharing. In some cases, vehicle ownership is the responsibility of each partner organization and in other cases one transportation provider is responsible for all vehicle procurement, purchase and disposal.

Benefits

1. The coordinated partnership can inform the funding providers on the most appropriate type of vehicle required to service the population group.
2. Specialist expertise can be accessed to make the best decisions on general option packages and specific design requirements. They can also be used to inspect vehicles before delivery.
3. Asset management strategies (e.g. vehicle replacement schedule) can be adopted.
4. A standardized fleet can be adopted by all members of the partnership, which will increase the availability of service for certain segments of the population (e.g. persons that use larger mobility devices).
5. Greater convenience for drivers and customers.

Challenges

1. Timing of vehicle acquisition is often not planned but occurs on an opportunity basis.
2. Driver/customer may have a preference for specific vehicles and equipment that are not chosen by the partnership.

Requirements

1. Establish a working group to determine guidelines for vehicle purchase, outlining both the required and desirable vehicle specifications (must haves and should haves). Engage specialist expertise regarding both vehicles and accessibility features/devices (can be done in-house if expertise exists).

Costs

1. Some staff time will be required and potentially higher costs for acquisition to make vehicles functional for broadest range of clients. Savings are anticipated from bulk purchase, lifecycle costing approach and potential to coordinate additional trips (by standardizing fleet).

Applicable Coordination Models

1. Model 1: Central Control (Required)
2. Model 2: Brokerage – Central Coordination (Optional)
3. Model 3: Brokerage – Confirmation Based (Optional)
4. Model 4: Voluntary Cooperation (Optional)

Assessment Methodology – Vehicle Purchase

The following steps should be followed to determine the potential benefit of and the ability to coordinate vehicle purchases. This will feed into the decision making process about the type of model to select.

Steps in the Process	Comments
1. Develop an inventory of the existing fleet for all organizations	Assemble fleet information from all organizations (vehicle type, size, capacity, year of purchase etc.).
2. Review vehicle replacement schedules	Conduct a condition assessment of all vehicles.
3. Review potential vehicle types and specification requirements	Review potential uses, current legislation, manufacturer's product, accessibility options to determine vehicle preferences.
4. Determine future fleet requirements and funding sources	Assess demand and determine acquisition needs. Identify funding sources. Respond to specific opportunities.
5. Establish a ten year vehicle acquisition plan	Document a ten year plan and adapt as required.

4.10 Vehicle Maintenance

Description

Transportation providers that own vehicles are required to inspect and complete regular maintenance on their vehicles in order to meet legislative requirements and ensure longevity of the fleet. Common maintenance procedures include regular inspections, preventative maintenance, major repairs etc. With small fleets owned by individual organizations, vehicle maintenance may not be a staff priority.

Coordination Opportunity

Through coordination, partner organizations can identify a lead organization or a single maintenance provider. In these cases, the partnership has achieved economies of scale, as well as more timely and effective vehicle maintenance programs. Arranging a maintenance contract should consider the need for multiple suppliers/locations or use of a single major maintenance facility for repairs, servicing and light maintenance.

Benefits

1. Could reduce the cost of vehicle maintenance through economies of scale.
2. Assigns priority to maintenance leading to timely and cost effective servicing.
3. Ensures more expertise is applied to this service area.
4. May reduce the overall fleet requirement if an effective maintenance management program is implemented (larger systems).

Challenges

1. Task will be more complex depending on the mix of vehicles in the fleet.
2. Concern that a centralized function is not responding to local priority.
3. Oversight and monitoring still required.

Requirements

1. Establish a working group to identify fleet maintenance requirements and develop a tender or negotiate with one maintenance provider.

Costs

1. A well-managed vehicle maintenance program is expected to generate cost savings.

Applicable Coordination Models

1. Model 1: Central Control (Required)
2. Model 2: Brokerage – Central Coordination (Optional)
3. Model 3: Brokerage – Confirmation Based (Optional)
4. Model 4: Voluntary Cooperation (Optional)

Assessment Methodology – Vehicle Maintenance

The following steps should be followed to determine the potential benefit of and the ability to coordinate vehicle maintenance. This will feed into the decision making process about the type of model to select.

Steps in the Process	Comments
1. Review existing schedule maintenance practices for each organization, including current maintenance supplier	Assemble information existing maintenance staff or contract used, scheduled maintenance activities, costs of services performed.
2. Engage an experienced resource to participate	A vehicle maintenance supervisor from a municipality may be able to provide independent advice and assess capabilities of local supply industry.
3. Develop a maintenance management program for the fleet	Within the partnership working group, develop a document outlining maintenance requirements for the fleet. The expectation is that the maintenance contractor would be responsible for record keeping. An experienced vehicle manager would be responsible for scheduling vehicles for maintenance activities.
4. Tender for fleet maintenance	Develop a tender document for fleet maintenance where there is a large fleet of vehicles. This typically involves a multi-year contract with duties and expectations clearly indicated. Where there is a small and/or geographically dispersed fleet, the decision may be made to contract the service to various maintenance suppliers (e.g. local garages in smaller rural areas). Select the preferred supplier.
5. Periodically audit the performance of the maintenance program	Develop a procedure to periodically audit the maintenance program to ensure vehicles are being maintained as expected.

4.11 Driver Training

Description

Each transportation provider is required to properly train their drivers (initial training and refresher training). Training sessions can include use of specialized vehicles, CPR, first aid, use of automated

external defibrillators, customer service training, defensive driving, lift operation, proper wheelchair restraint system usage, etc.

Coordination Opportunity

Through coordination, an established resource or program can be used for driver/volunteer training. Organizations can partner to provide training sessions for all drivers under the coordinated framework. This would ensure that all drivers are trained consistently and would minimize the need for each partner organization to have their own training sessions. If the combined number of drivers is large, a full-time or part-time dedicated trainer may be appropriate.

Benefits

1. Could reduce budget for driver training for each transportation provider.
2. Ensures all drivers are trained in a consistent manner, to the highest or most up-to-date standard.
3. Sets up a standard program to 'refresh' driver training requirements to confirm with new legislative requirements or improve performance based on best practices.
4. Reduces duplication of services.

Challenges

1. Hard to schedule drivers to attend a common session.
2. Mix of volunteer and paid drivers may be challenging.
3. Record keeping is required.

Requirements

1. Establish a group to review current practices and identify standard training requirements for all drivers under the coordinated framework. Strategy may be to coordinate for some training programs and retain individual sessions for other types of training.
2. Review any new legislative requirements and determine which partners are required to adhere to each.

Costs

1. Establishing standards and implementing coordinated training programs may result in higher initial spending on driver training relative to current budgets, particularly if the existing program is minimal. Well trained drivers will lead to fewer accidents/incidents and lower costs. Should be able to negotiate lower insurance costs.

Applicable Coordination Models

1. Model 1: Central Control (Required)
2. Model 2: Brokerage – Central Coordination (Optional)
3. Model 3: Brokerage – Confirmation Based (Optional)

4. Model 4: Voluntary Cooperation (Optional)

Assessment Methodology – Driver Training

The following steps should be followed to determine the potential benefit of and the ability to coordinate driver training. This will feed into the decision making process about the type of model to select.

Steps in the Process	Comments
1. Collect information on the number of paid and volunteer drivers and the initial and refresher training programs that are in place	Use information to assess the amount of training required annually and the types of programs that are currently in place.
2. Conduct a peer review of best practices in other areas	Conduct research to ensure driver training is in line with best practices across Ontario.
3. Agree on a standard for driver training	Outside expertise may be required to assist. Develop clear expectations for paid and volunteer drivers. Ensure necessary training programs are in place based on legislative requirements. Determine if new training programs should be developed.
4. Agree on program for monitoring and record keeping	Develop a program to monitor and track driver training. Automated software packages may be available from local fleet operators to help with this step. Assign ongoing responsibility to identify new training requirements.
5. Assess the need to hire a part-time driver trainer	Business case will depend on fleet size and complexity of the coordinated model. May be able to obtain service under contract.
6. Develop cost-sharing agreement	If driver trainer required, identify cost sharing agreement. Could be based on number of drivers employed by each transportation provider or as a user fee for each training requirement. The latter is typically preferred when one transportation provider that also employs the driver training employs the majority of drivers in the partnership.

4.12 Volunteer Recruitment and Training

Description

Volunteers donate time to organizations on an informal but regular basis. Many agencies depend on volunteer drivers to provide transportation service. Finding and maintaining a well-trained core group of

volunteer drivers can be a challenge for many organizations. This can be very time consuming and without coordination, each transportation provider would need to have its own staff to recruit, coordinate and train volunteers.

Coordination Opportunity

Through coordination, organizations can partner and implement a central volunteer recruitment program. Partner organizations can coordinate and share campaigns to attract new volunteer drivers. Creating a larger pool of volunteer drivers through sharing can greatly reduce stress on volunteers because they no longer have to do more than they can handle. It also expands the pool of volunteers in certain areas that have a previous history of not being able to access volunteers for services. Sharing volunteer drivers involves identifying existing volunteers that are willing to work for the coordinated system, not just for one individual organization. This, however, can be an issue because some volunteers only want to work for a particular organization or in a particular geographic area.

To help resolve this issue, organizations can develop an opt-in or opt-out system which allows volunteers to either volunteer for the coordinated transportation framework, or to volunteer solely for a local transportation provider/agency.

Another issue that may arise concerns the level of compensation volunteer drivers receive. This can be addressed by establishing a common reimbursement rate for all volunteers regardless of their organization affiliation.

Some coordinated transportation frameworks have moved beyond a sharing agreement and established a centralized volunteer recruitment process. This process includes standardizing volunteer policies, procedures and training, as well as pooling resources to find and recruit volunteers. The advantage of this approach is being able to dedicate a staff person to this role and apply more resources to this activity as required. The disadvantage is that a centralized staff person may not be as effective at finding local volunteers as someone that knows the local community.

Benefits

1. Could potentially reduce the total level of effort required by all agencies by moving to one central volunteer coordinator/recruiter.
2. Increases the pool of drivers available to provide the service.
3. Potential to increase ridership as some services are limited solely due to lack of drivers.
4. Provides relief for volunteer fatigue.
5. Addresses the replacement of aging volunteers.

Challenges

1. Some current volunteers strongly identify with local service and may not be agreeable to change.

2. Unionized places of work, with transportation elements, may object to unpaid, (or compensated for mileage etc.) volunteer drivers coming into a coordinated model.
3. There may be a short-term loss of volunteers if the process seems too onerous.

Requirements

1. Identify current volunteers that are willing to work for the coordinated system. Standardize volunteer reimbursement rates, methods of payments and policies and procedures for volunteers.

Costs

1. There should be a net savings from centralization but the staff time currently allocated in each local agency may not be identifiable. Some costs for marketing and communications materials are required.

Applicable Coordination Models

1. Model 1: Central Control (Required)
2. Model 2: Brokerage – Central Coordination (Optional)
3. Model 3: Brokerage – Confirmation Based (Optional)
4. Model 4: Voluntary Cooperation (Optional)

Assessment Methodology – Volunteer Recruitment and Training

The following steps are recommended to determine whether this element of coordination is right for your coordinated partnership:

Steps in the Process	Comments
1. Collect information from each agency on their current list of volunteers and policies and procedures	Compare policies and procedures and note substantial differences in volunteer standards and remuneration.
2. Assess the amount of staff time allocated for each agency to volunteer recruitment and training	A business case may support the ability to implement a centralized position if redundancy is identified.
3. Develop a model for a centralized volunteer intake, compensation, monitoring and training program	Consider best practices elsewhere regarding volunteer recruitment and training. Develop a working group to standardize volunteer recruitment and training policies and procedures. Standardize compensation rates and develop a common training program for all volunteers.
4. Interview existing volunteers to determine willingness to transition	Determine whether or not existing volunteers are willing to transition to the coordinated structure.

Steps in the Process	Comments
5. Develop a program to periodically re-assess current volunteers	This program could engage the best existing volunteers to act as 'training buddies'.
6. Develop a marketing program to recruit new volunteers	Can be combined with the marketing and awareness campaign in **Section 4.4**.
7. Develop volunteer recognition program	Keep track of years of service and recognize milestones.

5.0 Steps Required to Establish a Coordinated Transportation Model

The process of coordinating transportation services is challenging and will require the commitment from a group of stakeholders that share a common interest in enhancing transportation services within their community. It requires a working group with defined roles and responsibilities and the willingness to make trade-offs and work together towards a common vision.

The process to establish or build on an existing coordinated transportation framework can be broken down into six well-defined steps. These are:

STEP 1: Identify Two or More Organizations that Share a Common Goal that Coordination will Help Achieve

STEP 2: Inventory Existing Transportation Services and Key Stakeholders

STEP 3: Identify Service Demands and Gaps / Implementation Issues and Opportunities

STEP 4: Assess Different Coordination Models

STEP 5: Identify the Building Blocks of the Preferred Coordination Models

STEP 6: Select a Preferred Coordination Model

This chapter is intended to be used by municipalities, transportation providers and agencies that have an interest in developing or enhancing their existing coordinated transportation framework. Each step outlined above is described in more detail to allow a working group to envision, assess and implement their preferred coordinated transportation model.

Within each of the steps, detailed activities, requirements, operational barriers and practical solutions are identified.

By moving through this process, the goal is that a new coordinated partnership can be established or an existing partnership enhanced to better align with the unique circumstances of each rural community.

STEP 1 Identify Two or More Organizations that Share a Common Goal

The initial step in developing a coordinated transportation model is to identify two or more interested parties that share a common objective to improve rural transportation. In doing so, each partner should believe (in principle), that by working together in a coordinated structure, transportation services within their community can be improved through:

1. Lowered costs of providing services.
2. Increased effectiveness and/or quality of service for customers.

This starts as a very informal process where parties meet on a regular basis to discuss transportation service delivery issues and opportunities for a coordinated shared-resource model to meet their shared goals and objectives.

Through initial discussions, additional parties or stakeholders that could form part of the partnership should be identified and invited to join the working group. Being flexible and open in the early days of a partnership is essential to build trust and ensure the right parties are at the table talking about effective solutions.

Potential organizations that may form part of the partnership include:

1. Municipal Transit Systems providing either conventional or paratransit services;
2. Elected Officials or staff representing upper and lower tier municipalities that operate or would like to operate or support a community transportation service;
3. Community Care and Social Service Agencies that refer clients or directly provide community transportation services through paid drivers or volunteers;
4. Hospitals that provide non-emergency patient transfer or discharge transportation service;
5. Adult Day Centres, Nursing Homes and Long-term Care Facilities that have access to a vehicle or require transportation services for their clients;
6. Employers, Institutions and Post-Secondary Schools that provide or would support transportation services for their employees or students; and
7. Heath Agencies that provide service to their clientele based on a defined disability or medical condition (e.g. the Canadian Cancer Society).

Each organization that has joined the partnership should have a genuine interest in improving transportation services for members of the community, and/or the ability to contribute to the solution (through funding, operating resources and/or expertise). The partnership should be a manageable size, particularly at its initial stages.

The composition of the partnership may change over time as specific solutions become more apparent. Certain organizations may be skeptical and not see the value in the coordinated shared resource model or may not have the willingness or ability to commit to the shared goals and objectives. These organizations should be kept informed of the process, but their participation should not hinder the development of the model. It is far better to have an effective model that works with a small group of partners than to try and work through insurmountable or unsustainable models that involve a comprehensive list of potential partners/stakeholders.

Additional partners may be added to the partnership that may not have been identified at the beginning of the process. As the framework is adjusted, these new organizations may help strengthen the partnership and bring new energy to implement initiatives. This flexibility is important to move quickly and effectively to a recommended coordinated framework.

Where coordination is already occurring between two or more organizations, this step continues to be important to ensure the right players are at the table and a vision and process are established to assess whether the existing coordination model can be enhanced.

The partnership should meet regularly (at least monthly) to discuss potential solutions moving forward. Discussions should focus on:

1. Problems / issues with existing transportation service delivery from both a service provider and client perspective;
2. Opportunities to increase efficiencies and/or improve service levels through coordination;
3. A vision and goals/objectives that a coordinated framework would achieve;
4. Challenges to implementing the coordination model that must be resolved;
5. Potential funding sources;
6. A champion(s) to lead the process; and
7. Timelines, milestones and next steps.

While a champion is important, leadership should be inclusive to ensure all partners feel valued and have the ability to provide meaningful input to the direction of the coordinated framework. The key leadership attributes at this time in the process are the ability to listen effectively and to build consensus.

The formulation of a vision and goals/objectives is critical to this step as it helps provide direction to the working group. The vision is an overarching statement that identifies what and where the organization wants to be. This vision is meant to be forward thinking and inspiring.

Goals and objectives are then developed to achieve the vision and performance measures are established to track progress. A framework for decision making results, in which all actions of the organization are traceable back to the vision and monitoring is in place to measure results.

Examples of three potential goals that may be used by a partnership include:

1. Increase awareness of transportation options and services to the community.
2. Build transportation capacity using existing community resources.
3. Identify new funding sources to increase transportation capacity.

Within each of these goals, strategies that the working group may consider should be developed.

As part of the leadership structure, key roles and responsibilities should be identified for each member of the partnership. Roles and responsibilities should link to each step in this process (see Step 2 to 6 below) and to achieving the goals of the partnership identified above.

Defining clear roles and responsibilities will also help create buy-in during this process and minimize confusion about tasks to perform to develop and implement a coordinated framework.

Step 1 Summary:

The following presents a summary of the requirements, barriers, and potential solutions to complete Step 1.

1. Identify two of more parties that are willing to work together to explore the potential of a coordinated transportation framework.
2. Work with funding partners to identify the potential to pool resources towards a common goal.
3. Identify an organization or champion that will explore the development of a coordinated transportation framework. This can be more than one organization if there are only a few partners involved. However, if there are numerous potential partners, one or two organizations should take a lead role in the group.

ACTIVITIES

4. Develop a vision for success, including goals and objectives. The vision should be clear and concise and have support from all organizations in the partnership.
5. Develop a partnership commitment or memorandum of understanding between the participating organizations to agree to examine the potential for coordination. This ensures buy-in from all parties and commitment. Within the agreement, the goals that the partnership would like to achieve should be clearly outlined and roles or each partner should be stated.
6. Meet at least monthly, following Steps 2 to 6 below, until the opportunity to establish a coordinated transportation framework is fully assessed and a decision is made about whether and how to move forward.

CHECKLIST OF REQUIREMENTS

- ✓ Two or more parties that provide or fund rural transportation services
- ✓ Leadership from one or more champions.
- ✓ Agreement to meet and discuss the framework on a regular basis (at least monthly).
- ✓ A clear and concise vision and goals agreed to by all organizations in the partnership.
- ✓ A signed Memorandum of Understanding.

OPERATIONAL BARRIERS

- Too many parties with diverging views (can make the process unmanageable).
- Time and resources to identify existing issues and help develop a workable framework.

POTENTIAL SOLUTIONS

- Keep the partnership small, starting with organizations that have similar mandates.
- Strong leadership and client focus that motivates partners to stay involved and dedicated.
- Use of outside expertise to help facilitate and guide the process.
- Request formal commitment from Council or the board of directors for each participating organization to show their support for exploring the

POTENTIAL SOLUTIONS

development of a coordinated transportation framework. Include targets and timelines.

- Develop a memorandum of understanding early in the process to confirm commitment of each member of the partnership.

STEP 2 *Inventory Existing Transportation Services and Key Stakeholders*

Once the initial working group that will assess coordination opportunities has been identified, the next step is to conduct an inventory of existing transportation resources in the community and identify key stakeholders that may contribute to the transportation solution (e.g. municipalities, social service agencies, nursing homes with an available vehicle, etc.). It is important to understand the level of transportation services already in place, types of users benefiting from services, the availability of services and opportunities to improve service. This information will be used to assess service needs, issues, opportunities and gaps (Step 3).

Three methods are recommended to collect information on existing transportation service providers and stakeholder groups. These are listed below and should be conducted in sequential order:

1. **Web-Search and Background Review:** Begin with a review of existing public, not-for-profit and private sector transportation services and programs. The working group formed in Step 1 should have a good sense of existing transportation service in the community and can provide an initial list of other transportation providers and stakeholder based on local knowledge. This list should be comprehensive and include all transportation services, regardless of their potential fit in the coordinated framework. This will help establish an understanding of service needs and gaps within the rural community.
2. **On-line/Mail and/or Telephone Survey:** Once a list of existing transportation services and stakeholders has been identified, the initial background data gathered should be supplemented by conducting a survey. A questionnaire should be developed by the partnership group to ensure each transportation provider and stakeholder is asked consistent questions. This will facilitate better comparisons and understanding of the broader transportation picture. If there are a significant number of transportation service providers and stakeholders to interview, an initial step is to develop an online or mail out survey. Where there are only a few potential respondents, a telephone survey may also be useful and can be combined with the step below.
3. **Follow-up with Key Stakeholders**: Upon review of the online or mail out survey, telephone or in-person meetings should be used to follow-up and fill in the gaps, particularly for potential partners in the coordinated framework. This also helps develop a better understanding of the intricacies of the service and the transportation needs, gaps, issues and opportunities.

There are four general groups that surveys can be sent to (depending on the nature of each partnership):

1. Existing transportation service providers (public, private and not-for-profit).
2. Organizations that purchase or refer clients to other transportation service providers.
3. The municipality(s) in which the coordinated framework will operate.
4. Funding agencies.

Research, survey questions and interviews should focus on a number of areas relevant to the development of a coordinated transportation framework, including the existing services in place, vehicles and other resources available, funding levels, issues and opportunities, etc. **Table 2** provides a summary of the type of information that should be collected for the inventory.

It should be noted that data on private sector transportation providers can be difficult to obtain due to their unwillingness (in many cases) to disclose operating information in a competitive environment. Failure of some parties to respond to these questionnaires should not hold back the completion of this step.

At the conclusion of the review of existing services, the data should be assembled in a format that allows for comparison between different transportation service providers and other stakeholders. This will allow the partner organizations to compare similarities and differences, and address potential service needs, issues, opportunities and gaps. This analysis will form the basis of the next step in the development of a Coordinated Transportation Framework (**Step 3**).

Table 2 - Summary of Information to be Collected During the Inventory Phase

Information	Transportation Service Provider	Agencies that Refer Clients to Transportation Services	Municipalities	Funding Agencies
Type of Service Provided				
Hours/Days of Operation	✓			
Service Area	✓	✓		
Ridership Statistics	✓			
Capital				
Vehicles (number and type)	✓			
Facilities	✓			
Office Space	✓			
Resources (number of part-time, full-time and volunteers)				
Drivers	✓			
Mechanics	✓			
Dispatchers / Coordinators	✓			
Management	✓			
Customer Service Staff	✓			
Policies and Procedures				
Eligibility Criteria/Exclusions	✓	✓		✓
Operating Practices	✓			
Legislative Requirements	✓			
Maintenance Practices				
Funding Sources				
Subsidies, Grants and Donations	✓	✓	✓	✓
Stable Funding Sources	✓	✓	✓	✓
Passenger Fares	✓			
General Comments				
Issues with Service Delivery	✓			
Client / Resident Needs	✓	✓	✓	✓
Willingness to Coordinate	✓	✓	✓	✓
Potential Solutions	✓	✓	✓	✓

Step 2 Summary:

The following presents a summary of the requirements, barriers and potential solutions to complete Step 2.

ACTIVITIES

1. Develop a comprehensive list of existing transportation providers and stakeholders through research and discussion with each of the partner organizations.
2. Develop a standard questionnaire or interview template to ensure consistency in the data collection process.
3. Through background research and various surveys and interviews:
    a. Conduct a review of existing resources, including hours of service, geographic area, population served and existing performance.
    b. Identify any legislative requirements, funding restrictions, labour/union agreements, eligibility criteria or other constraints that may limit the potential for coordination.
    c. Identify potential funding sources and stakeholder partnership opportunities
    d. Assess potential desire for organizations being surveyed/ interviewed to participate in the coordinated framework.
4. Organize data in a logical format that is easily comparable.

CHECKLIST OF REQUIREMENTS

- ✓ List of existing service providers and key stakeholders.
- ✓ Resources required to implement the data gathering task.

OPERATIONAL BARRIERS

- It can be time consuming and challenging to gather all of the necessary information.
- Requires cooperation from a number of organizations.
- Requires some expertise in design of survey questions.
- When gathering information investigate multiple approaches (on-line survey, telephone call etc.).

POTENTIAL SOLUTIONS

- Follow-up with personal contact where necessary to ask further questions or when clarification is needed.
- Identify alternate methods to encourage reluctant stakeholders to provide the information being requested.

STEP 3 Identify Service Demand and Gaps/ Implementation Issues and Opportunities

This step is an extension of the Step 2 data collection described above. The purpose of the Step 2 is to collect data on existing conditions and needs, whereas Step 3 requires the analysis of data and views to determine service demands and gaps as well as potential implementation issues and opportunities. This information will be used to better understand the types of coordination models that should be assessed (Step 4).

Service Demand and Gaps

Service demands and gaps can cover a variety of areas that should be assessed to determine the potential for coordination. The demand for transportation services is a function of the need or desire of community members to make trips to fulfill a specific purpose (e.g. go to work, school or medical appointments). Service gaps are determined by comparing the supply of service relative to the demand. Demand can be determined by assessing existing travel patterns, demographics and the distribution of population and employment in the rural area. This data is often available from municipalities in the form of Official Plans or Transportation Master Plans. Where this data is not available, the working group may choose to conduct a survey of existing customers or residents to determine the types of trips they currently make and need to make if transportation services were more available. Future demand can be determined by forecasting the growth in service based on population and employment growth or the increased usage expected from a service level improvements. This would be undertaken in Step 2.

When identifying service gaps, it is important to prioritize which gaps are more important to address. For instance, certain gaps (e.g. late evening service) may only impact a small number of people and may not be considered cost effective to implement.

Some examples of potential service gaps to assess include:

1. **Temporal Availability:** Are transportation services available when a resident needs to make a trip? This can be broken down by period of the day, day of the week or even by season (some transportation providers reduce or eliminate their service during summer periods).
2. **Geographic Availability:** Are affordable transportation services available across the community? This could include an assessment of key origins where residents request to be picked-up and key destinations where residents request to be dropped-off. The assessment of geographic availability could include key origins and destinations outside the boundaries of the rural area where service is provided (e.g. hospitals in adjacent counties or regions).
3. **Capacity Issues:** Are there capacity issues that cause a number of trip requests to be denied (demand responsive service) or customers to be passed by due to overcrowded buses

(conventional services) during normal operating hours? This can be measured by asking each existing transportation provider to review or record activity logs to determine the accommodation rate or calculate passenger loads on existing vehicles. The presence of capacity issues during normal operating hours can often be alleviated by pooling resources together in a coordinated framework.

4. **Accessibility:** Can existing services accommodate persons with disabilities? The definition of persons with disabilities should also be made clear to understand if existing services are accessible by persons with physical disabilities, cognitive disabilities, visual disabilities, etc.
5. **Eligibility:** Are certain segments of the community ineligible for transportation services? A number of transportation providers focus their service on seniors and persons with disabilities and will not provide service for persons under the age of 65. This is typically a result of funding mandates. Therefore, while service may be available to all parts of the study region, it may only be available to a certain segment of the population.
6. **Trip Purpose:** Do existing transportation services accommodate all trip purposes? Many transportation service providers will prioritize certain trip purposes (e.g. medical trips) and do not have the capacity to accommodate other trip purposes (e.g. employment, recreational). Common gaps are employment trips, post-secondary and adult education travel, trips for youth to after school programs and more discretionary travel for clients of existing services.
7. **Affordability:** Are transportation services affordable to residents? This is a somewhat subjective criterion. For a trip to be affordable, it is typically partially subsidized by the transportation service provider or a program based on a customer's household income.
8. **Understanding and Navigation:** Is information on all service providers readily available and easily understood by potential customers? This means having an appropriate website and/or other materials to communicate transit information and how to use the system.

Service Issues

Service issues are defined as challenges that will need to be assessed and potentially addressed when determining the type of coordination model that is appropriate for the partnership. In some instances, it may be deemed that certain issues cannot be addressed. It is important to understand these issues or barriers when developing a coordination framework.

An example of a number of different issues/challenges that the partnership may encounter is listed below:

1. **Challenges in Servicing Unique Population Groups:** Many clients that receive service from a single agency may be used to a certain level of service and processes. Moving to a coordinated structure will involve a degree of change and customer concerns will need to be managed. Many customers even find it difficult to deal with different drivers and new customer service personnel.

2. **Privacy Issues:** Using the same database platform to standardize the information collected could give all organizations access to client information that may be considered confidential to one particular organization. It is important to ensure that client confidentiality is not jeopardized. Many database platforms can be set up to block discrete information and ensure that privacy is maintained. Privacy concerns also may arise when a client using transportation to access a 'sensitive' service is sharing a trip with another client who lives in the same community.
3. **Stable Funding:** It is important when developing a coordinated framework that existing funding sources are not jeopardized. While a number of funding programs will be common among the partners involved, some partners may receive funding for other sources that require certain requirements to be met. For example, Local Health Integration Network (LHIN) funding is targeted to seniors and persons with disabilities, and moving to a coordinated framework will require certain assurances that LHIN funding is still being used to meet their Aging at Home mandate. Specific coordination models may be seen to jeopardize this funding and this issue needs to be discussed up-front, including the involvement of key funding partners.
4. **Differences in Passenger Fares or Volunteer Remuneration:** Many of the partners will likely have different pricing structures for passenger fares and remuneration rates for volunteers. If a coordinated transportation network is operating under a common brand, customers will expect to pay the same fee, no matter which agency vehicle is dispatched to provide the service. Fares and compensation rates can be difficult to standardize and there needs to be a process that partnering organizations can work through.
5. **Upfront Costs:** There are certain upfront costs required when developing a coordinated framework. This could include the cost of a scheduling software program, a 1-800 number (where the geographic area of the expanded network requires some residents to call long distance), marketing and communications programs, and office space and set up. The upfront costs need to be known and assessed relative to the future savings generated by the coordinated network.
6. **Deadheading Costs When Traveling Between Service Areas:** While coordination can potentially lead to a number of efficiencies, such as increased availability of trips for clients, demand responsive services can incur increased deadheading costs for vehicles traveling between communities and these costs will need to be accommodated. This extra cost typically occurs only when a local vehicle is not available to accommodate a trip.
7. **Different Service Hours:** Each transportation provider may have different hours of service for both the provision of transportation service and for receiving calls for client intake/ trip reservation (for demand responsive services). While these hours are often similar, some transportation operators provide more limited service hours and this may need to be addressed.
8. **Legislative Requirements:** The Accessibility for Ontarians with Disabilities Act (AODA) legislation will have a profound impact on both the operation of conventional and specialized (demand responsive) transportation services. Partnerships that incorporate conventional public transit

services (operated by a municipality) will need to adjust the availability of specialized service to be consistent with the conventional service. This includes operating within the same service hours, geography and having fare parity.

Potential Opportunities

The identification of opportunities is just as important as the identification of issues and challenges. Opportunities represent potential quick wins that can be capitalized on to help ease through the process. The following section provides a brief summary of some potential opportunities that the data collection phase (Step 2) can unearth. Most of these are related to the existing coordination efforts that are already taking place:

1. **Existing Environment of Trust and Cooperation:** In many situations, an environment of cooperation already exists among a number of organizations operating within the rural environment. Cooperation is typical among community care agencies, who regularly meet to discuss common issues. Developing trust and cooperation forms the beginning steps of a more fulsome coordination framework.
2. **Existing Brokerage Applications:** Certain agencies and public transit systems will already have experience brokering service to other agencies or private sector providers (e.g. the taxi industry or school bus operators). Brokering service is a common form of coordination and this experience will help participating organizations understand the logistics of this process.
3. **Common Database Platform:** A number of community care agencies use database platforms to record client information for reporting and invoicing purposes. Where agencies use a common database platform, standardizing information and a potential interface with a scheduling software package may be easier to implement.
4. **Funding Opportunities:** The Province provides gas tax funding for transportation through municipalities. This sustainable funding source may be available to assist with coordination activities leading to improved rural transportation and is applicable if a municipality takes a key role in the partnership (see **Chapter 6**).

Summary

A series of workshops should be held with the potential transportation partners to confirm and prioritize service gaps and address potential implementation issues and opportunities. Prioritizing service gaps is important to establish a sustainable coordinated framework. Not all service gaps will be resolved by the coordinated framework and it is important to identify areas that the partnership wishes to address. This process should work towards achieving the vision and goals identified in Step 1.

Implementation issues and opportunities will be used to help identify a potential coordinated transportation model (Step 4) and the potential transportation functions that should be coordinated within the model (Step 5).

Once priorities are set, it is important to identify which priorities can be addressed through efficiencies and improvements gained through a coordination network and which require enhancements to the level of service (and additional funding).

These steps are summarized below.

Step 3 Summary:

The following presents a summary of the requirements, barriers and potential solutions to complete Step 3.

ACTIVITIES

1. Review data collected from Step 2 and develop a matrix of existing services, demands and gaps.
2. Forecast future demand and identify gaps in service. Identify any challenges in meeting the forecasted demand using the existing service model.
3. Conduct a workshop with the partnership to work through each type of service need or gap identified above that is of interest to the group. By this point in time, the potential partnership could have expanded based on comments heard and discussions with other transportation service providers and stakeholders in Step 2.
4. Determine potential areas where coordination may help to resolve the service need and gap versus areas where the expansion of existing resources is required.
5. Develop a summary table of service needs and gaps that could potentially be addressed by the coordinated framework.

CHECKLIST OF REQUIREMENTS

- ✓ Staff time or outside assistance to review and assess data collected in Step 2.
- ✓ Organize a partner workshop to review all the service demands and gaps.
- ✓ Organize a second partner workshop to address potential issues and opportunities when evaluating, selecting and implementing a coordinated framework.

- Too many issues, gaps and needs identified which seem insurmountable.
- Separating the gaps and service needs that would benefit from coordination versus those which require additional funding or added resources (Step 4).

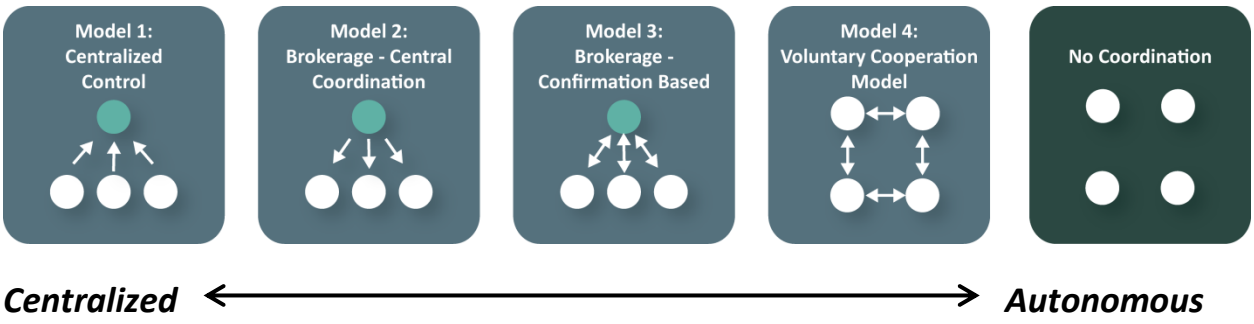
- A good facilitator to help the partner workshops to sort through and prioritize all the issues, opportunities, demands and service gaps.
- Don't try to solve all the problems in the region all at once. Address the 'low hanging fruit' to build confidence and trust before taking on larger issues.

STEP 4 Assess Different Coordination Models

There are several levels of coordination to be considered under a coordinated transportation framework. **Chapter 3** provides a description of the four levels of coordination that should be considered. The coordination levels range in the level of centralization versus the level of autonomy retained by each transportation service provider. The four models are:

1. **Model 1: Centralized Control:** One lead organization plans and operates all transportation services, with partner organizations participating providing expertise through a steering committee and funding and/or resources to the partnership.
2. **Model 2: Brokerage – Central Coordination:** One lead organization plans and schedules all transportation services in the partnership, with partner organizations retaining ownership of their vehicles and resources.
3. **Model 3: Brokerage – Confirmation Based:** One lead organization plans and schedules all transportation services, but requires confirmation from partner organization before planning a coordinated trip. Partner organizations retain ownership of their vehicles and resources.
4. **Model 4: Voluntary Cooperation:** All partner organizations work together to improve policies and processes and potentially provide a central transportation information service (one number to call for all transportation needs). Each partner organization continues to operate independently.

The structure of each of the models is graphically illustrated below.



Priorities assessed in Task 4 provide the partnership with some insight into the type of coordination opportunities that will help address service gaps. The review of issues and opportunities will also identify the potential level of coordination that may be applicable to the proposed partnership.

Not all of the models may be applicable or feasible. The advantage and disadvantages of each should be evaluated within the context of the proposed partnership and narrowed to one or two options that the group feels should be investigated further.

When the working group is assessing the level of coordination that may be applicable, it is important that each partner has an understanding of the desired level of independence that each would like to maintain. In most cases, this is a difficult question to ask as most organizations would prefer to retain as much independence as possible. A workshop should be held to address this issue with a neutral facilitator included to aid in this difficult discussion. Once each partner has made their position clear, the working group should identify the advantages and disadvantages of implementing each level of coordination. Major incentives may include the opportunity to free staff time from transportation duties to focus on the key mandate of the organization; the ability to deliver more service for clients by pooling resources and the ability to meet a broader range of travel needs (e.g. employment or youth travel) and improve quality of life for all rural residents.

The preferred model should not be selected at this point, but the choice narrowed and included in the assessment of different coordination functions. This is described in Step 5.

Step 4 Summary:

The following presents a summary of the requirements, barriers and potential solutions to complete Step 4.

ACTIVITIES

1. Hold an evaluation session with representatives from each organization to discuss, evaluate and decide on the level of coordination desired.
2. Each partner should outline their desired level of independence within the coordinated framework.
3. Assess the advantages and disadvantages of each level of coordination.
4. Narrow the list to one or two models that the group feels should be investigated further. All parties must agree. This will be included as part of the more detail assessment (Step 5).

CHECKLIST OF REQUIREMENTS

- ✓ Each partner has made their desired level of independence clear.
- ✓ Engage a neutral facilitator to help partners work through this difficult decision of retaining control or delegating some aspect of the transportation function to another party.
- ✓ Summary of the advantages and disadvantages of implementing each level of coordination.
- ✓ One or two models have been identified for further investigation.

OPERATIONAL BARRIERS

- There is the potential for operational barriers and challenges with each level of coordination. See **Chapter 3** for specific details on this model.

POTENTIAL SOLUTIONS

- **Chapter 3** outlines potential solutions for each coordination model.

STEP 5 *Identify the Building Blocks of the Preferred Coordination Models*

Once the level of coordination has been determined, the working group should assess the potential for various transportation functions to be coordinated. **Table 3** provides a summary of transportation functions that should be considered under each coordination model. **Chapter 4** provides a detailed description on each potential transportation function and the methodology to follow to determine if it makes sense for the selected coordinated model.

Going through this process will help identify a preferred level of coordination and the functions that are needed to help address the service gaps identified in the community.

Table 3 - Summary of Functions Applicable to each Coordination Model

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 / Complaints Handling	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 and Training	1	3	3	3

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

An evaluation of each function that has potential for coordination should be completed. This should be done by the working group in a workshop setting. Evaluation criteria should be defined to determine the applicability of each function to the preferred coordination model. Some potential criteria include:

1. **Ease of Implementation** – Is the transportation function easy to implement based on existing reporting structures and the ability to alter existing processes within each partner organization? What are the costs required to implement and is funding available to do so?
2. **Cost Efficiency** – Are cost efficiencies gained through the coordination of this transportation function (e.g. less duplication of staff, increased ride sharing)?

3. **Effectiveness –** Does the coordination of this function allow the partnership to better reach its intended goals and address the priority service gaps identified in Task 3?
4. **Access to Service** – Does the coordination of this function improve the ability of a resident or client to register for service, request a trip (knowledge of service options) or be provided a service (accessibility and accommodation rate)?
5. **Level of Service** – Does the coordination of this transportation function improve the overall level of service to residents?
6. **Funding** – Are new sources required to coordinate the function or can funds be reallocated?

The assessment of coordination opportunities for each transportation function requires a more detailed understanding of issues that need to be resolved and opportunities that can be capitalized on in order to make the partnership successful. While there are certain issues that can be easily addressed, others are more complex and require innovative solutions. During the assessment, the working group should identify any issues that may present itself under the chosen coordinated framework. For each aspect, a conclusion should be made as to whether the issue or need can be resolved.

Step 5 Summary:

The following presents a summary of the requirements, barriers and potential solutions to complete Step 5.

ACTIVITIES

1. Hold an evaluation session with representatives from each organization to discuss, evaluate and decide on the potential applications for coordination based on the level of coordination chosen in Step 4.
2. Assess each the potential coordinate each transportation function based on the specified list of criteria.
3. Identify any potential issues that may arise through coordination of each transportation function.
4. Review the challenges of coordination and identify potential solutions and any implementation risks. These should be agreed to by all parties involved.
5. Identify the costs of coordination and compare to the costs of staying with the status quo. This should be done looking forward at the anticipated demand in the 5 to 10 year horizon.

CHECKLIST OF REQUIREMENTS

- ✓ List of potential applications for coordination.
- ✓ Summary table outlining the results of the assessment for each potential coordination opportunity.
- ✓ Summary of potential issues and whether or not they can be overcome under the coordinated model.

OPERATIONAL BARRIERS

- There is the potential for operational barriers and challenges with each application. See Chapter 4 for specific details on each function.

POTENTIAL SOLUTIONS

- See Chapter 4 for specific details on solutions for each function.

STEP 6 Select a Preferred Coordination Model

Based on the results of the evaluation conducted in Steps 4 and 5, select the preferred coordination model and the coordinated transportation functions that are to be implemented under the partnership.

5.1.1 Implementation and Service Plan

Develop an implementation plan that allows the organizations to move towards the preferred coordination model.

The working group should begin by outlining a broad strategy for implementation. A clear and concise outline should be developed to help keep the working group focused on the goals of the partnership. The vision statement and goals should be revisited and revised if required to meet the preferred coordination framework. Specific targets and timelines should also be established.

For each of the preferred coordinated transportation functions, the working group should assign an individual or sub-group to:

1. Detail the activities to be undertaken to implement the coordinated strategy.
2. Identify a lead partner to be accountable for the effective implementation of each coordinated function.
3. Identify roles and responsibilities of all partner organizations.
4. Determine potential funding sources and cost-sharing agreements to cover anticipated costs.
5. Determine organizational structure of the mandate, including responsibilities and accountabilities.
6. Develop agreements between the partner organizations or a formalized contract or memorandum of understanding. This should outline the commitment between the partner organizations and address areas such as invoicing and sharing of resources.

The next step is to develop a detailed service plan. This report should outline how the coordinated structure will be organized and implemented. Details regarding the need for the service, the role of each partner, funding sources, the ability of the service plan to meet current and projected travel demand, the benefits of the coordinated structure and efficiencies should be included in the plan. The service plan should also outline policies and procedures and a description of the agreements between partners.

Following the development of the service plan, an action plan to implement the coordinated framework should be developed. The action plan should include items such as creating an organizational structure; providing necessary staffing; setting policies and procedures; and entering into contract and agreements for the provision of services.

5.1.2 Budgeting and Cost-Sharing

Budgeting and cost-sharing agreements are an important part of this process. Participating organizations in the partnership will need to work together to develop a budget for coordinated transportation services. This needs to take into account expected revenue, individual expenses and expenses that will be shared by the partnership (e.g. cost to purchase a scheduling software program).

Cost-sharing agreements will also need to be developed where all partners benefit from the shared use of a resource. This could be in the form of direct operating costs (driver salary, vehicle maintenance, fuel); long-term life-cycle costing (e.g. vehicle replacement); or overhead/administration costs (e.g. scheduling software program, licensing fees, transportation coordinator staff time, office space).

Developing a fair and transparent cost-sharing agreement will begin with a good understand of existing record keeping practices and the establishment of a monitoring program. Understanding how each partner collects data will be important in developing a cost sharing model. Relevant data that should be collected to assist in cost sharing allocation includes:

- Total ridership;
- Ridership per vehicle hour;
- Population serviced;
- Number of registrants (where applicable);
- Revenue vehicle hours;
- Vehicle kilometres traveled;
- Number of vehicles; and
- Growth in ridership.

Using this information, cost sharing formulas can be developed for each transportation function that is being coordinated under the recommended model. For example, the cost of a marketing campaign may be allocated based on the size of the population each organization in the partnership services while the cost of a transportation coordinator may be allocated based on ridership. For example, a simple cost sharing agreement to allocate the salary of two transportation coordinators to the coordinated framework would be to base the allocation on the percent of ridership each organization within the partnership carries. Therefore, if organization “A” carries 75 percent of the ridership and organization “B” carries 25 percent of the ridership, the cost of the two dispatchers should be split using a similar ratio.

Cost sharing models may also be designed to account for future growth in the system. If, for example, ridership growth triggers the need to hire a third transportation coordinator, there should be a mechanism to determine the allocation of the third staff member since the use of the same allocation may no longer be appropriate. Using the example above, if ridership using organization “A” grew by 5

percent while ridership using organization "B" grew by 25 percent, it could be concluded that organization "B" triggered the need to hire a third transportation coordinator. In this situation, a cost-sharing formula should be considered that balances the number of trip requests for each service (organization "A" and "B") with the rate of growth in trip requests for both services. An example of this type of formula is illustrated below.

FUNDING ALLOCATION FORMULA FOR NEW DISPATCHERS:

(% Future Trip requests for Organization 'A' x Weighting)

+

(% Growth in Trip Requests for Organization 'A' x Weighting)

=

% Funding allocated to Organization

There is no predefined formula that is available that will be applicable to all coordinated transportation networks that can be identified in this guideline document. There may be certain organizations involved that provide more in-kind services such as office space or expertise. Using a very strict cost sharing allocation formula in this situation may eliminate certain valuable members of the partnership. Therefore, while cost sharing is important, each coordinated transportation partnership will need to assess its own record keeping capabilities and the characteristics and resources of the partners it takes on to determine the best means of cost sharing.

5.1.3 Monitoring

With any new partnership, it is important to review and monitor progress to ensure that the coordination model is meeting the goals and objectives originally set out in the partnership. The last activity is to establish a working group that is responsible for monitoring and reviewing all aspects of the service. Monthly, quarterly and annual reports should be prepared so that interested stakeholders in the partnership can keep informed regarding the progress and performance of the coordination efforts.

Step 6 Summary:

The following presents a summary of the requirements, barriers and potential solutions to complete Step 6.

ACTIVITIES

1. Select a preferred model and seek agreement with each of the participating partners.
2. Confirm the mission statement and vision for the partnership.
3. Outline the broad strategy to keep everyone focused on the task.
4. Develop a service plan to provide details on how the coordinated structure will be organized and implemented.
5. Review existing record keeping activities and update where required.
6. Develop a budget for the partnership and determine a transparent and fair cost-sharing process.
7. Approach funding partners to secure funding.
8. Develop an action plan for implementation with a timetable and key milestones.
9. Establish a monitoring plan to measure results against the goals of the partnership. Report this to funding agencies.
10. Implement the plan.

CHECKLIST OF REQUIREMENTS

- ✓ Outline of the broad strategy
- ✓ An updated memorandum of understanding or service contract
- ✓ Action plans in key areas
- ✓ Timetables with key milestones
- ✓ A Cost-sharing agreement and monitoring plan
- ✓ Communications strategy

OPERATIONAL BARRIERS

- Potential for disagreement on the preferred model.
- Disagreements on a cost sharing strategy for the preferred model.
- Disagreements on how to implement the preferred model.

POTENTIAL SOLUTIONS

- Work with an experienced independent facilitator or expert on community transportation to help resolve issues.

6.0 Funding Options for Coordinated Transportation

One of the most significant challenges to providing rural transportation services is the ability to secure sustainable funding. A number of funding sources have been identified to assist organizations with the provision of transportation services. The most common funding mechanism is the use of passenger fares. However, this only accounts for a portion of operating costs of an organization, and other funding mechanisms are required to ensure the service is sustainable and can meet its mandate.

The following section provide further details on potential funding sources that can be investigated when seeking to improve existing or introduce new transportation services within the coordinated partnership.

6.1 Passenger Fare Revenue

Passenger fares forms an important part of the revenue stream for public transit and community transportation services. Most transportation providers charge each of their clients a fare for service. This could be in the form of set fare per trip, a per kilometre rate, a fare by distance formula with various fare zones established. Wait-time fees are also charged to clients by many community transportation operators that provide long-distance medical trips to out-of-town locations.

In most transit systems, different fare payment options are available, including cash fares, tickets and monthly passes. Discounts are also often provided to seniors and youth. Where a municipality operates both a conventional and specialized transit service (paratransit), the AODA legislation requires fare equity between both systems, in terms of costs and fare payment options. This is important to note when the community support sector is involved in delivering trips for registered specialized transit customers on behalf of a municipality.

There are several methods that coordinated partnerships can use to increase the amount of funding generated through passenger fares. These are:

1. Increase the average passenger fare.
2. Increase ridership per revenue vehicle hour of service.

As identified in **Chapter 2**, increasing passenger fares can be difficult as it can often make the service unaffordable. For passengers with low or fixed incomes, high fares will limit their ability to use the service.

Fare increases may be viewed negatively by customers, especially if they perceive that the service they are receiving has not improved. However, fare increases may be necessary to help pay for the cost of improved service and also to keep up with the rising costs of operating and maintaining the system (e.g. fuel, operating and maintenance costs, etc.). To minimize any negative reaction, it is recommended that any fare adjustments being considered by the partnership coincide with significant service improvements (where possible). This approach will give customers the impression that they are getting appropriate value from the increased fare.

Affordability is an issue that frequently arises when considering the fare strategy being adopted for the partnership. Many municipalities have instituted targeted affordability programs that are administered by social services departments rather than the transit operator. Social service programs administered by provincial ministries (e.g. Ontario Works, Ontario Disability Support Program) can often be used to address affordability issues. In certain situations, transportation tickets are purchased at full value by the social service agency and distributed to clients under specific program criteria or credit vouchers are purchased from the partnership, issued by the agency and redeemed by the client.

Relying on these types of programs can help address affordability issues that come with fare increases, although, this will only address a certain segment of the population.

The second goal is to increase the number of passengers per revenue vehicle hour of service (vehicle occupancy). As indicated in **Chapter 2**, the vehicle occupancy for each trip can be difficult to increase due to the nature of rural transportation. Low densities, dispersed origins and destinations and long-distance travel make grouping trips a challenge. There may also be privacy concerns depending on the clients being served.

Coordination provides the opportunity to increase the number of resources available to a common transportation provider, thus the ability to share resources and share riders. By increase the number of potential customers and the number of vehicles a transportation coordinator has access to, efficiencies can be gained through greater economies of scale. This may reduce the need to rely on passenger fare increases or other outside funding sources.

6.2 Other Operating Revenue

There are other opportunities for revenue that the partnership can explore to off-set the need for other subsidies. These include:

1. Advertising Revenue.
2. Charter Service Revenue.

Advertising revenue typically constitutes less than two percent of operating revenue for public transit agencies in rural areas. With smaller systems that service a smaller population base, this percent of

overall revenue is typically less. Depending on the vehicle type, advertising opportunities can be located both inside and outside of vehicles. Websites and printable materials can also have spots for sponsorship opportunities; although consideration must be made to ensuring that the 'brand' of the transportation partnership is not lost in a clutter of ads. Developing a simple sponsorship package and making it available on the website provides a simple tool to increase revenue, even if it is only a small amount.

Charter services occur when the partnership contracts out one of its vehicles for exclusive use by a person or group. There are a number of examples where this occurs, including charters for nursing homes to take their residents to a day-activity. Where vehicle capacity is not an issue, charters can be an effective means of increasing overall revenue.

6.3 Municipal Subsidy

Where a municipal transit service is involved in the partnership, municipal subsidies (through property taxes) are allocated to cover the remaining operating costs not funded through other revenue streams (e.g. passenger fares, charter services, etc.). This is measured using a financial performance indicator called "Revenue to Cost Ratio". For specialized transit systems that service a municipal population of less than 50,000, the average Revenue to Cost ratio is approximately 20 percent. For conventional transit systems within the same population group, the average Revenue to Cost Ratio is 40 percent. This refers to the percentage of operating cost recovered by passenger revenue. The remaining operating cost is typically covered by municipal subsidies. As a general rule of thumb, smaller systems that service low density areas typically have achieve a lower Revenue to Cost Ratio.

Capital costs are typically also fully funded by municipal subsidies.

There are also numerous examples where grants are provided to community agencies that operate transportation services. This is typically a line item in the municipal budget that needs to be approved on an annual basis. This is typically done when the community agency can demonstrate the benefit that its service has on its residents.

Some municipalities have used a transportation levy per household and business (e.g. $10 to $15 annually) to fund transportation services within their community. This is a small investment that could go a long way to supporting mobility and access to employment, education, healthcare and services for residents. An example of this is the County of North Hastings, which instituted a small levy to support the TROUT transportation service.

Municipalities are challenged in trying to control overall spending while allocating sufficient dollars to maintain or improve existing service levels. Transit services compete with all other municipal departments for the available fiscal resources. It is therefore incumbent for the partnership, where municipal funding is received, to demonstrate that the service is well managed and doing all it can to

maximize revenues and minimize costs. Prudent financial management will help to convince council that continued investment in the partnership is justified and worthwhile.

6.4 Provincial Gas Tax Program

Provincial gas tax funding is a source of sustainable revenue that is dedicated to municipal transit authorities and forms an important part of the funding envelope. Since the funds can only be used for public transit, it is often an untapped resource that is not being taken advantage of in a number of rural communities where public transit is not in place.

Given the importance of this fund, the following section provides a more detailed description on the provincial gas tax and the rules around its use. More information on the gas tax program can be found at http://www.mto.gov.on.ca/english/service-commitment/gas-tax-program.shtml.

6.4.1 Background

In October 2004, the Province of Ontario announced that it would invest a portion of the provincial gas tax in public transit in order to ensure that local public transportation services continue to operate and that transit ridership is increased through the expansion of public transportation capital infrastructure and levels of service. The program's goal is to improve municipal sustainability by increasing public transit ridership and reducing the impact of transportation activities on the environment.

Since the beginning of the program, more than $2.7 billion in gas tax funding has been committed to Ontario's municipalities. In 2012/2013, $324 million was allocated amongst the participating Ontario municipalities based on two cents per litre of the provincial gas tax. In 2013, the Legislature passed the Dedicated Funding for Public Transportation Act, 2013, which made funding of two cents per litre of Gas Tax permanent.

Gas tax funds are dedicated to transit and cannot be used for any other purpose. Unless otherwise approved by MTO, gas tax revenues are only provided to support municipal public transportation expenditures above a municipality's baseline spending and not to reduce or replace current levels of municipal public transportation funding. The gas tax funds can be spent on the following public transportation items provided the expenditures are above the municipality's baseline spending:

- Expenditures that promote increased transit ridership;
- Transit operating expenditures;
- Replacement of public transportation vehicles;
- Improvements to transit security and passenger safety; and
- Major refurbishments on any fully accessible, or to be made fully accessible, public transportation vehicle.

For municipalities that provide only specialized services for persons with disabilities, transit strategies that may not initially result in ridership growth but will provide increased accessibility can be considered as eligible expenditures if approved in writing by the MTO prior to implementation.

All new public transit vehicles procured with gas tax funding must be fully accessible (in accordance with the requirements set out under the *Ontarians with Disabilities Act* (2001) and the *Vehicles for the Transportation of Physically Disabled Passengers* (1990)). In addition, acquisition of new transit vehicles must comply with the Canadian content policy requirements.

The funding allocation that the participating municipalities receive depends on the total funding envelope available, their transit ridership and the municipal population. To calculate potential gas tax dollars that may be available for a municipality, 70 percent of the funding formula is based on the transit system's ridership compared to the provincial total. The remaining 30 percent is based on the population of the municipality relative to the provincial total (of all participating municipalities) as estimated by the Ministry of Finance through the Census. This formula provides an incentive for ridership growth and provides more support for growing municipalities. For new recipients, gas tax funding is based solely on the population served in the first year; transit ridership level is then considered for year two and all subsequent years.

Ridership calculations are based on data included in the Canadian Urban Transit Association (CUTA) fact books. CUTA annually collects and publishes, on behalf of the Ministry of Transportation, transit ridership data in its Ontario Urban Transit Fact Book and its Ontario Specialized Transit Services Fact Book. Transit ridership is defined as a one-way, single passenger fare, linked trip, delivered using a vehicle that is being operated by, or on behalf of a municipality. Volunteer transportation can be included as part of the ridership calculation as long as it is coordinated by the municipality or on behalf of a municipality (through an agreement to provide service). Also, only trips that originate in the municipality that has the gas tax agreement are counted. To maximize the attainable allocation, it is beneficial that gas tax funding be coordinated through the county in a regional network.

The Ministry also reviews the annual municipal spending for each transit system to ensure that gas tax funds provided to the municipality does not exceed 75 percent of the revenue put back into the system. The municipality's own spending on transit includes municipal subsidy from property tax, passenger fares, financial donations earmarked to transportation, advertising and charter revenue, fund raising, sale of assets, etc. Revenue received by the transportation organization from other Ministries (e.g. LHINs) is not included in the calculation of municipal spending on transit.

Where municipalities coordinate with an existing transportation provider (e.g. a community care agency), the existing revenue (including from fares) collected by the agency to provide transportation services forms part of the base line calculation to determine the amount of funding provided by the gas

tax. The extent of the coordination determines whether the fare revenue is considered as part of the municipal spending. The trips must be operated by, or on behalf of, the municipality to be included.

The municipality can change their level of commitment in their bylaw and the provincial funds would adjust accordingly.

6.4.2 Program Requirements and Process

To be eligible to receive provincial gas tax funds, a municipality must support and contribute financially towards the public transportation services. Public transportation that is supported includes any service where a fare is charged for transporting the public by way of vehicles operated by or on behalf of a municipality (or under agreement between the municipality and a person, firm or corporation). This includes specialized public transportation but does not include pilot projects or special purpose facilities such as school buses, tourist services, ambulance or non-emergency medical transportation. There are no rules in place regarding the fare structure, so long as the public/customer pays a fare.

For services being provided throughout multiple municipalities, more than one municipality is permitted to participate in the gas tax program, as long as a lead municipality is identified. In this case, an agreement would be put in place to have one 'host' municipality that takes care of administrative tasks and reporting. The dedicated gas tax funds would flow directly to this host based on the combined population of all participating municipalities. All of the municipalities would have to agree to provide baseline financial support and develop municipal bylaws stating their commitment.

Should an organization establish commitments with one or some of the lower tier municipalities rather than the upper tier municipality, only the trips/ridership that either begin or end within the partner municipalities would be included in the funding calculation.

Following the establishment of a formal agreement, the municipality would subsequently notify the MTO of their intent to support the public transportation services provided by the organization and outline a specific annual financial commitment that will be made to these services, provided in the form of a municipal bylaw. The MTO then provides the municipality with a gas tax package that includes a letter of agreement, program guidelines and reporting forms. To receive funding payments, the municipality must provide two signed letters of agreement (signed by the head of municipal council and the Chief Financial Officer) and a copy of the authorizing municipal bylaw. The MTO will then gain approval from the Minister and determine the allocation for the municipality.

The municipality must provide annual reports, submit annual ridership statistics to CUTA and may undergo audits by the MTO to ensure program compliance (that funds are used for public transportation and program guidelines and requirements are met). Once approved, the funds are received electronically and held in a dedicated reserve account to be dispersed toward eligible expenditures.

6.5 LHIN Funding

The Local Health System Integration Act, 2006 changed the way Ontario's health care system is managed by creating 14 Local Health Integration Networks (LHINs).

The legislation grants LHINs the power and authority to effectively plan, coordinate, and fund local health systems including:

- Hospitals;
- Divested psychiatric hospitals;
- Community Care Access Centres (CCACs);
- Community support service organizations;
- Community mental health and addictions agencies;
- Community health centres; and
- Long-term care homes.

Every three years, each LHIN identifies its priorities, which are documented in an Integrated Health Services Plan. The current planning documents are for the years 2013-2016. Three priorities are typically set for health care which are grounded in Ontario's Action Plan for Health Care, as well from feedback from local health providers and members of the community.

A number of LHINs have focused on transportation as one of their priorities. The focus is typically on providing seniors and persons with disabilities with access to health services through an Aging at Home Strategy. The goal of 'Aging at Home' is to allow seniors to live more independently in their communities by providing access to needed services. This can have the effect of reducing hospital visits and intake into long-term care facilities.

Other programs include funding for non-emergency medical transportation programs that improve discharge from and patient transfer between hospitals.

There are various opportunities for LHIN funding that can be explored by the partnership and each LHIN is different in their priorities and the rules that are applied to funding. Most community care agencies that provide transportation services typically receive part of their funding from their local LHIN. Certain LHINs have also contributed to the development of coordinated transportation frameworks between community care agencies.

As the partnership explores funding opportunities, their local LHIN needs to be part of the discussion to identify potentials programs or strategies that, with funding support, can help address the LHINs broader healthcare mandate. As an example, EasyRide[7] applied for funding from their LHIN to support the purchase of a scheduling software program and a new scheduling/dispatch office. The funding has been used to increase the effectiveness of transportation services for seniors and persons with disabilities, which in turns, met the LHINs overarching "Aging at Home" objectives.

Where a member of the partnership already has access to LHIN funding, a key step early in the process is to ensure that existing funding is not jeopardized due to a change in the mandate of the partnership (e.g. a decision is made to focus on all trips, while the LHIN focus is on seniors and persons with disabilities). While there are examples of community agencies where LHIN funding restricts their ability to coordinate, there are also examples where LHIN funding has been used to support coordinated transportation, even if it extends beyond the LHINs mandate. Moving beyond the LHIN mandate to support a broader mobility mandate will likely require clear metrics and targets to be established to ensure that the portion of funding provided by the LHIN continues to serve the needs of their target demographic (seniors and persons with disabilities) under the coordinated framework.

This should begin by establishing a baseline for the eligible population group under the LHIN framework. For example, if the eligible LHIN population group is seniors, the baseline could establish the number of annual trips or average funding per passenger trip for this demographic group. If the mandate or the coordinated framework expands the eligibility (e.g. to adults and youth), the LHIN would want some assurance that the dollars they invest would continue to provide the same or a better level of service to seniors. Developing this performance metric and targets can help track this and provide some reassurance that their mandate will continue to be met.

6.6 Federal Gas Tax Program

The Canadian Federal Gas Tax Fund was first introduced in 2005 and redesigned and reintroduced as a part of the New Building Canada Plan (Plan) in 2013. The Plan includes permanent gas tax funding of $2 billion dollars annually (indexed at two percent per year with annual increments of $100 million).[8] This funding is to be distributed from 2014 to 2024 through Federal-Provincial-Territorial agreements.

The amount of funding provided is calculated on a per capita basis with the 2011 Census informing the funding from 2014 to 2019 and the 2016 Census informing the remaining five years. Within Ontario, the funding is provided up-front twice a year and is disseminated to the Province, the City of Toronto, and

[7] EasyRide is a coordinated transportation network in Huron and Perth Counties made up of five community care agencies.
[8] http://www.infrastructure.gc.ca/pub/infra/gtf-fte/gtf-fte-2013-eng.html#low

the Association of Municipalities in Ontario (AMO).[9] On behalf of the Federal government, the AMO manages the funding to municipalities in Ontario and administers signed Municipal Funding Agreements.[10] All municipalities are eligible for funding on a per capita basis.

Federal gas tax funding received by municipalities can be used for eligible infrastructure projects. There are seventeen eligible types of infrastructure projects, including public transit infrastructure, wastewater infrastructure, short-line rail, local roads and bridges, brownfield redevelopment, culture, recreation, and broadband and connectivity.[11]

The big difference between this funding opportunity and the provincial gas tax is that municipalities can spend it on other infrastructure needs and are not required to use the funding for transit projects. In a number of rural municipalities, this makes federal gas tax funding less attainable for transit purposes due to various competing demands in the municipality. More information on the Federal Gas Tax program can be found at http://www.infrastructure.gc.ca/plan/gtf-fte-eng.html.

6.7 Other Funding Sources

The Ontario Trillium Foundation is an agency of the Ontario Government that provides funding grants to charitable and not-for-profit organizations with the mission to build healthy communities. Applicable priorities of the foundation related to rural transportation include creating healthier, more active Ontarians and having more people engaged within their community. More information on the Ontario Trillium Foundation can be found at http://www.otf.ca/en/index.asp.

Local funding opportunities should also be explored. Transportation funding to improve rural services may be received from various sources such as major employers, non-profit organizations, service clubs and through donations. There may be the opportunity to create partnerships with organizations that are willing to contribute funds for the provision of services.

Another funding source that could be used is from established non-profits within the rural area that already provide some level of transportation. They will have an established method of fundraising and related activities (usually annual events) along with other methods used to raise community awareness, about their organization, in order to receive donations, bequests, etc.

[9] http://actionplan.gc.ca/en/initiative/community-improvement-fund
[10] http://www.amo.on.ca/AMO-PDFs/Gas_Tax/Agreements_and_Allocations_GTF/AMO-GTF-Agreement-2014.aspx
[11] http://www.infrastructure.gc.ca/plan/gtf-fte-eng.html

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7.0 Study Region Assessments

The following section of this guideline presents an assessment of potential coordinated frameworks for three rural study regions in Ontario. The three counties that were assessed are:

1. Wellington County
2. Dufferin County
3. United Counties of Leeds and Grenville

For each study region assessment, information was obtained through a survey of existing stakeholders and a follow-up workshop to discuss existing transportation services that are in place, the needs and objectives of stakeholders and residents within each county and the potential for future coordination of existing or new transportation services.

An online survey was developed and sent to three different stakeholder groups within each county to guide the discussion of coordinated transportation. These are:

1. **Existing transportation service providers:** These surveys were sent to public, private and not-for-profit agencies that deliver some element of rural transportation services within the county. The purpose of this survey was to better understand existing services, determine potential for service coordination, identify service gaps and explore the issues and challenges facing service providers.
2. **Organizations that refer clients to transportation services:** The purpose of this survey was to identify the potential demand for rural transportation service, the degree to which agencies were contributing resources or funding to existing transportation services and their thoughts on a future coordinated transportation network.
3. **Municipal authorities responsible for decision-making on transportation services:** These surveys were sent to both municipalities that fund and provide transportation services and those that do not. The purpose of the survey was to better understand how municipalities view the transportation needs of residents and employers and where transportation and a potential coordinated transportation framework fit in the municipal priority list.

Follow-up interviews were conducted with a number of stakeholders to complete the survey data and a half-day workshop was conducted to review the existing transportation situation and discuss the potential to develop a coordinated transportation network.

Following this initial data collection and consultation exercise, the Steps Required to Develop a Coordination Transportation Framework documented in **Chapter 5** of this report was used to determine a direction for coordinated transportation in each study region.

The objective of the study region assessment is to provide a starting point for each of these counties to undertake a more detailed review of transportation services within their community, confirm the value of a coordinated approach, identify local champions and a leadership group and begin the process of moving towards a coordinated community transportation framework.

WELLINGTON COUNTY

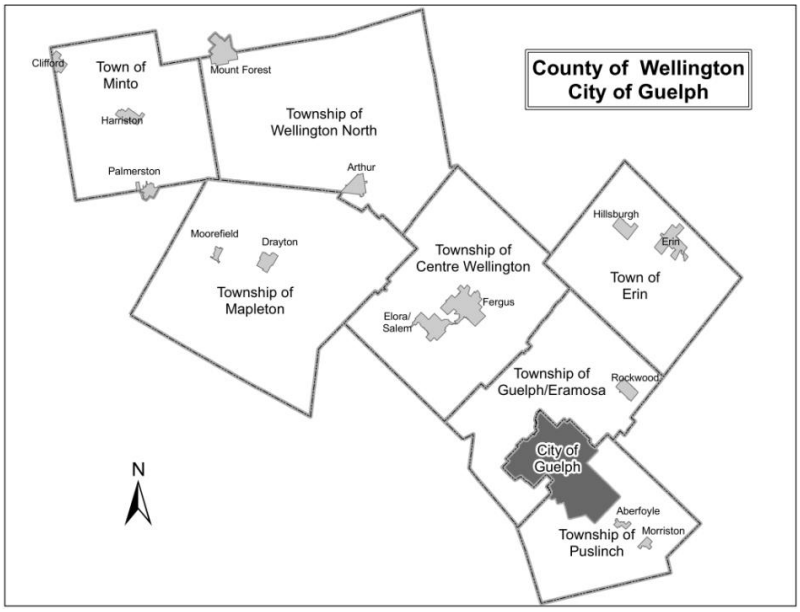
7.1 Wellington County

Background / Context

Wellington County is located in Southwestern Ontario, to the northwest of the Greater Toronto Area and immediately east of the Region of Waterloo. It is bordered by Counties of Grey and Bruce to the north, Dufferin County and Peel Region to the east, Halton Region and the City of Hamilton to the south, and the Region of Waterloo and Counties of Huron and Perth to the east. The City of Guelph is a separated municipality surrounded by the County and is located close to the Highway 401 corridor.

The County has a population of 86,672 located within a large geographic area that spans 2,569 square kilometres. The County of Wellington, its rural urban areas and the separated City of Guelph are shown in **Figure 1**.

Figure 1 - County of Wellington



(Source: Wellington County)

The County is composed of seven lower tier municipalities:

- Township of Centre Wellington;
- Town of Erin;
- Township of Guelph/Eramosa;
- Township of Mapleton;
- Town of Minto;
- Township of Puslinch; and
- Township of Wellington North.

Each lower tier municipality has its own unique characteristics, including demographics, employment base and transportation needs. The largest township by area is Mapleton, followed by Wellington North and the largest by population is Centre Wellington. **Table 1** provides a summary of the size, employment, population and population density of each municipality within the County. As can be seen, the County compromises a large, low density rural area.

Table 4 - Population Density Summary

Municipality	Land (sq. km)	2011 Population	2011 Employment	Population Density/(sq. km)
Centre Wellington	407	29,880	12,950	64
Erin	297	11,930	3,590	37.5
Guelph/Eramosa	292	13,310	4,680	41.4
Mapleton	535	10,620	5,230	18.4
Minto	300	9,320	3,820	28.3
Puslinch	214	7,490	4,510	31.2
Wellington North	524	12,100	7,470	21.3
Wellington County	**2,570**	**94,660**	**42,250**	**34.6**

(Source: 2011 Socio-Economic Profile, County of Wellington Official Plan)

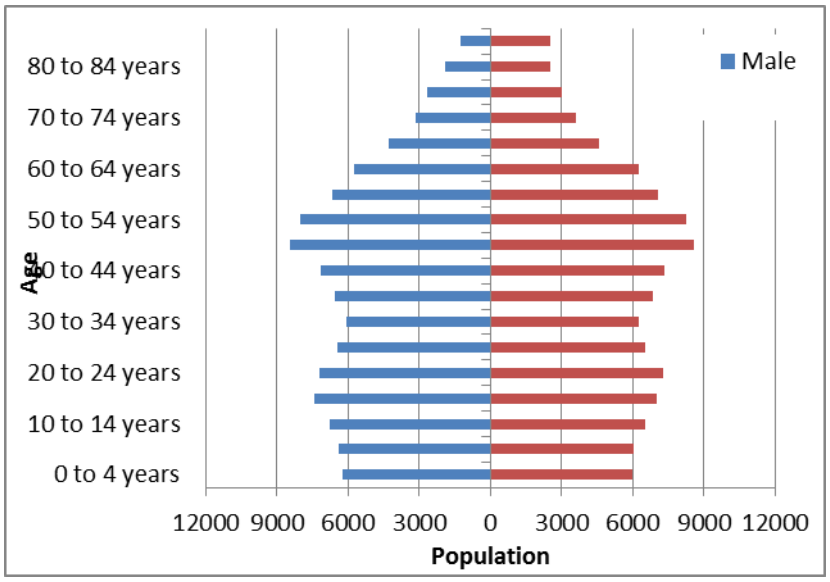
Within the County, there are 14 small urban centres. These centres contain the majority of the population and employment and provide schools, recreation, shopping and services. Approximately one third of the County's population and one fourth of the County's employment is located within Centre Wellington. Guelph/Eramosa and Wellington North also have large concentrations of population and employment. **Table 5** indicates the population of these rural urban centres and the separated City of Guelph is included for reference.

Table 5 - Urban Centre Existing and Future Population

Urban Centre	Population	
	2011	2031
City of Guelph	121,688	175,000
Fergus	15,260	22,760
Elora-Salem	7,410	10,950
Mount Forest	5,060	7,620
Rockwood	4,510	6,150
Erin Village	3,000	4,400
Palmerston	2,980	4,060
Arthur	2,540	3,310
Harriston	2,220	2,720
Drayton	2,020	3,100
Hillsburgh	1,280	2,080
Clifford	840	1,160
Moorefield	600	1,270
Morriston	460	550
Aberfoyle	240	410

Figure 2 illustrates the 2011 population pyramid for the County. The County has an aging population with approximately 14 percent of the population over the age of 65 (2011). This is in line with the provincial average of 14.6 percent.

Figure 2 - Wellington County 2011 Population Pyramid



(Source: Stats Can 2011 Community Profiles)

Wellington County is expected to experience moderate population and employment growth. Under the 2006 Places to Grow Plan, Wellington County has been forecasted to grow to approximately 122,000 by 2031. The majority of this growth will occur within the 14 urban areas. **Table 6** displays the population and employment projections for the County. Total employment is also expected to increase by 37.6 percent from 2006 to 2031 (from 39,240 to 54,000).

Table 6 - Projected Growth in Wellington County to 2031

	2006	2011	2016	2021	2026	2031
Total Population	89,540	94,660	101,700	108,300	115,130	122,00
% of Population in Urban Centres	49	51	53	55	56	58
Households	30,030	32,320	34,870	37,220	39,660	42,100
Total Employment	39,240	42,250	45,700	49,130	51,560	54,00

Source: County of Wellington Official Plan

The County has a mix of employment opportunities. Manufacturing constitutes 21.3 percent of current employment in the County, with agriculture, forestry, fishing and hunting (12.2%), and retail trade (9.7%) rounding out the top three employment sectors. Manufacturing (19.6%), health care and social

assistance (8.5%), and construction (7.8%) account for the highest share of resident labour force in the County[12].

Table 7 provides more detail about the distribution of the forecasted population and employment growth for each of the lower-tier municipalities.

Table 7 - Wellington County Population and Employment Projections for the Urban Centres

Municipality	Population		Employment	
	2011	2031	2011	2031
County of Wellington	94,660	122,000	42,250	54,000
Wellington North	12,100	15,600	7,470	9,020
Minto	9,320	11,640	3,820	4,560
Mapleton	10,620	12,670	5,230	6,110
Centre Wellington	29,880	41,350	12,950	17,330
Guelph-Eramosa	13,310	15,290	4,680	5,760
Erin	11,930	15,530	3,590	5,460
Puslinch	7,490	9,920	4,510	5,760

Source: County of Wellington Official Plan

Approximately one third of the County's population is located within Centre Wellington, and this is expected to grow by 11,500 people by 2031. One quarter of the County's employment is located in Centre Wellington, and this will also see the largest growth by 2031 (about 4,400 additional jobs). The second largest employment concentration is located in Wellington North.

The majority of the population growth will occur in Fergus and Elora-Salem (an increase of 12,000 people by 2031), followed by Mount Forest (an increase of 2,000 people by 2031) and Rockwood (an increase of 1,200 people by 2031).

The rural urban areas have population and employment concentrations that may be able to support some level of community transportation. These centres also draw residents from more rural areas of the County who may require transportation to access jobs and services. In addition there are also the linkages between the rural urban centres and larger urban areas adjacent to the County (most notably Guelph, Kitchener and Cambridge) which present transportation demands.

A number of these employers continue to face challenges in attracting employees who do not have access to a private automobile. TG Minto in Palmerson (Minto) is a good example. The auto parts company employs over 600 workers and faces some challenges in attracting employees due to the lack

[12] *Source: 2011 Socio-Economic Profile*

of transportation services. This issue is not isolated to TG Minto. The recent Minto Business Retention and Expansion Report reported that 45 percent of businesses stated that the lack of public transit posed a problem for their workforce.

STEP 1 Identify Two or More Organizations that Share a Common Goal

The very first step in the process is to identify two or more parties that are willing to work together to explore the potential of a coordinated framework.

During the Wellington County stakeholder workshop, a number of organizations expressed an interest in being part of the solution and improving transportation services in Wellington County. They also expressed a desire to work together to assess whether a coordinated framework is right for them. Some of these organizations include:

1. **County of Wellington** – strong interest in improving transportation services for residents and supporting employers that have indicated a lack of public transit service is posing a problem for their employees.
2. **Local Municipalities** – in particular, the Town of Minto has expressed a desire to enhance transportation services to support employees getting to work, Centre Wellington has indicated that transportation is a municipal priority and Guelph Eramosa has also stressed the need for improved rural transportation.
3. **Local Agencies** - several staff attending the focus group session expressed an interest in continuing to build on the coordination efforts already in place.

Confirmation of this group would need to take place through a series of working sessions and a commitment to work together documented through a memorandum of understanding. A lead organization would also need to be identified as a next step. The County as the lead agency would provide strong leadership to motivate everyone and keep the momentum going. They would also have access to provincial gas tax funds which could be used to help enhance service levels as part of the partnership.

STEP 2 Inventory Existing Transportation Services and Key Stakeholders

The next step in the process is to better understand transportation services that already exist as well as the various stakeholders and their ability to contribute to the transportation solution.

While the County of Wellington and its lower-tier municipalities do not provide funding for a dedicated public transit or community transportation service, there are a number of transportation services that operate within the County and in adjacent municipalities.

Existing Transportation Services

An inventory of existing transportation service providers was prepared to identify the extent of service currently being provided within the County. **Table 8** provides a brief summary of existing services as identified through the on-line survey conducted as part of this study region assessment.

Table 8 - Existing Transportation Providers in Wellington County

Organization	Type
Fergus Elora Senior Trans	**Community Agencies**
Community Resource Centre of North & Centre Wellington	
Family & Children Services Guelph Wellington County	
Centre Wellington Social Justice Group	
VON	
East Wellington Community Services	
Guelph Transit	**Regional and Municipal Conventional Transit, Paratransit and Community Bus**
Grand River Transit	
Orangeville Transit	
GO Transit	
Taxi services	**Private Organizations**
Red Car Service	
School bus operations	
Elliot Coach Lines Ltd.	
Denny Bus Lines Ltd.	

It is important to note that the results presented below may be incomplete as not all organizations participated in the online survey. Where survey results were not obtained, a basic description of the service is provided.

A next step for the partnership is to continue to target transportation service providers and stakeholders that did not complete the survey, particularly those that the group feels is important to understanding transportation in Wellington County.

Fergus Elora Seniors Trans

Fergus Elora Seniors Trans provides transportation services for residents of Fergus / Elora using an accessible mobility bus. The service is provided Tuesday and Wednesday from 9:00am to 4:00pm. Passengers requesting a ride must book with the dispatcher 24 hours ahead of time. The fare for the service is $2.00, which covers approximately 90 percent of operating costs.

Volunteer drivers are used to operate the service.

The service is fairly well used. Based on comments received, there is a demand for the service to operate more than two days a week, but the agency has had difficulty finding additional volunteers to operate the service.

KEY CHARACTERISTICS

Organization Type: Community Agency

Operating Model: Demand Responsive using part-time volunteers

Annual Ridership: ~2,500

Vehicles Owned: 1 Accessible Mobility Bus

Eligibility: Open to all residents

Geographic Focus: Fergus/Elora

Community Resource Centre of North and Centre Wellington

Transportation services from the Community Resource Centre are provided to low-income residents of North and Centre Wellington. Service to access key destinations within and beyond Wellington County is provided any time that part-time volunteers are available to make the trip.

Trips are coordinated through a central referral point in the County of Wellington Transportation Services. Parties in need of transportation can call a 1-800 number and are referred to the appropriate agency based on responses to three screening questions. Additionally, agencies including VON, Fergus Elora Seniors Trans, Cancer Society, East Wellington Community Services and Canadian Mental Health provide referrals to the service.

KEY CHARACTERISTICS

Organization Type: Community Agency

Operating Model: Demand Responsive using part-time volunteers

Annual Ridership: ~2,100

Vehicles Owned: None – volunteers use their personal vehicles

Eligibility: Low-income residents

Geographic Focus: Centre Wellington/ Wellington North

The program is fully funded by the County, therefore, there is no fee to the passenger. The service acquired 170 new clients in 2013 and receives nearly 2,500 trip requests resulting in over 2,100 completed trips a year.

Family & Children Services Guelph Wellington County

Family & Children Services Guelph Wellington serves clients who live within Wellington County. Upon request, clients have access to a team of 10 to 12 part-time volunteer drivers who may transport children to school or children and families to the centre.

The program uses government funding to deliver approximately 8,500 rides annually. Because of the high demand, there are not enough volunteer drivers. Taxi service is sometimes used when volunteer drivers are not available.

KEY CHARACTERISTICS

Organization Type: Community Agency

Operating Model: Demand Responsive using part-time volunteers

Annual Ridership: ~8,000

Vehicles Owned: None – volunteers use their personal vehicles

Eligibility: Clients of Family & Children Services

Geographic Focus: Wellington County

VON (Victorian Order of Nurses)

The VON operates demand responsive transportation services for seniors and adults with disabilities within Wellington County. Their fleet includes two regular vans and two accessible vans which are operated by seven paid drivers. VON also utilizes approximately 45 to 50 volunteer drivers who use their own vehicles to complete trips.

VON coordinates volunteers with the Cancer Society and the Community Resource Centre to ensure that services are not being duplicated. The Community Resource Centre also has a standardized volunteer training program that the VON participates in.

KEY CHARACTERISTICS

Organization Type: Community Agency

Operating Model: Demand Responsive (paid drivers in agency owned vehicles and volunteer program)

Annual Ridership: ~23,000

Vehicles Owned: 2 regular vans, 2 accessible vans

Eligibility: Seniors and Adults with Disabilities

Geographic Focus: Wellington County and key destinations outside the County

Approximately 23,000 trips are made annually with primary services occurring Monday to Friday. Medical calls are prioritized and medical-related trips are accommodated on the weekends if requested. Trips can be taken both within Wellington County and to key inter-regional destinations such as Hamilton or Toronto. Passengers pay a standard fee for in-town trips ($3.50 one way) and a per km rate for out-of-town trips (45 cents/km). The VON also has a fare subsidy program which is based on a client's income.

There is a surplus of demand that the VON is unable to accommodate. Only a limited number of 'everyday living' trips are being accommodated due to a shortage in volunteer drivers.

Funding sources include the Local Health Integrated Network (LHIN), the United Way and various grants.

East Wellington Community Services

Similar to VON, East Wellington Community Services serves seniors and adults with disabilities who reside in Wellington County. East Wellington Community Services coordinates with VON who provides some services if applicable and available.

KEY CHARACTERISTICS

Organization Type: Community Agency

Operating Model: Demand Responsive

Annual Ridership: ~1,800

Vehicles Owned: 1 regular van, 1 accessible van, 1 accessible, 18-passenger bus

Eligibility: Seniors and Adults with Disabilities

Geographic Focus: Wellington County and key destinations outside the County

Most trips are medical related and include transportation to key destinations both within and outside the County. Approximately 1,800 trips per year are taken using one regular van, one accessible van, and one accessible 18-passenger van.

Services are provided Monday through Friday from 8:00 am to 4:30 pm with the majority of funding generated through the per km fare rate (45 cents/km). With a roster of 15 volunteer drivers and one paid driver, there is difficulty in retaining qualified volunteer drivers. It was identified that the service may benefit from another paid driver position and a review of the fare structure since cost is a barrier to those clients with recurring medical needs.

Guelph Transit

Though not part a part of Wellington County, Guelph Transit could be a potential partner in a coordinated model due to its proximity attraction as a major destination.

KEY CHARACTERISTICS

Organization Type: Municipal

Operating Model: Fixed Route & Demand Responsive

Annual Ridership: 6.9 million

Vehicles Owned: 73 buses, 11 mobility buses

Eligibility: Open to all residents; mobility bus open to registered users that have a disability.

Geographic Focus: City of Guelph

Guelph Transit provides both fixed route and demand-responsive services through its conventional, paratransit and community bus services. Its 73 conventional buses and 11 mobility buses provide 6.9 million rides per year. The fare to use the service is $3.00 for an adult one-way trip. Discounts are applied for students and seniors and for monthly pass and ticket holders. Conventional fares account for 46 percent of the service funding (the remaining 54 percent of operating cost is subsidized).

Guelph has a U-Pass agreement in place with the University of Guelph, which provides unlimited access to its transit system for registered students.

Saugeen Mobility and Regional Transit

Saugeen Mobility and Regional Transit is a specialized public transit service providing transportation solutions to the residents of eight municipalities in Bruce and Grey Counties in Ontario. While Saugeen Mobility is not located within Wellington County, they do provide some service to the northern portion of the County. Saugeen Mobility owns 10 accessible minivans, one non-accessible van, 11 accessible mobility buses and has 20 part-time paid drivers to operate the service.

KEY CHARACTERISTICS

Organization Type: Municipal

Operating Model: Fixed Route & Demand Responsive

Annual Ridership: 21,052

Vehicles Owned: 10 accessible minivans, 1 non-accessible van, 11 accessible mobility buses

Eligibility: Persons with disabilities (physical, cognitive, visually impaired)

Geographic Focus: City of Guelph

In order to be eligible for the service you must have a physical or cognitive disability or be visually impaired. The fare to use the service is $2.00 plus $0.30/km for rides to 'local destinations' and $0.30/km plus $18.00/hour for charter rides to other destinations. Saugeen Mobility currently has 900 registered clients and provides 21,052 annual trips.

Grand River Transit

Grand River Transit (GRT) provides a high level of regional public transit service) within the urban municipalities of Kitchener, Cambridge and Waterloo. While GRT is not located within Wellington County, they are located in close proximity and have been identified as a potential partner. GRT may also be a good resource to assist with planning given their experience in providing public transportation. The Region has reviewed the need for public transit to its rural areas and developed a methodology for assessing and implementing such services. A GRT bus route was extended from Kitchener Waterloo to St. Jacob's and Elmira in Woolwich Township and provides a good case study from which to assess the opportunity to extend fixed route services from major urban to rural urban centres.

Orangeville Transit

Orangeville Transit, located in Dufferin County provides three fixed routes within the Town of Orangeville. While Orangeville Transit is not located within Wellington County, they are located in close proximity and have been identified as potential partners.

GO Transit

GO Transit has a park and ride facility located in Aberfoyle. A number of GO Bus routes pass through this location providing transportation to Kitchener/Waterloo, Guelph, Milton/Square One, Bramalea and Meadowvale. GO Bus also operates along Hwy 7 between Guelph and Georgetown.

Red Car Service

Red Car provides door-to-door service to and from the major regional airports and is available throughout the County. They also provide charters and tour service. Since this is a private operation with higher rates than offered by the community care sector, they are a resource, but would likely not form part of a partnership.

Taxi Services

The County issues a number of taxi licenses to service providers for the ability to operate within the county. There are currently 11 sedans that are licensed in the county that service the Fergus / Elora Area, and 5 additional sedans that primarily service the north. Two accessible taxis were also recently licensed and are based out of Guelph. All 18 taxis can service the entire County. There are currently five taxi companies that own the 18 sedans.

In many cases, there are opportunities to contract community transportation service to the taxi industry.

North Wellington Cancer Services

North Wellington Cancer Services has a volunteer driver program. Volunteer drivers are used to provide patients with transportation to radiation and therapy cancer treatments throughout the County and beyond. The program is fully funded by donations.

Community Mental Health Association (CMHA)

Community Mental Health Association (CMHA) has a volunteer program. They currently have four to five volunteer drivers within Wellington County that provide patients with transportation to CMHA appointments. Drivers are paid a per km rate to provide the trips and the majority of trips are destined within the County. Currently the CMHA has no designated budget to provide this service. They are currently spending approximately $5,000 a year on transportation services, providing 25 to 30 trips per month.

Elliott Coach Lines Ltd.

Elliott Coach Lines (Fergus) Ltd. offers weekday commuter bus service between Elora-Salem /Fergus and the University of Guelph. Tickets are $4.50 each way. A book of 11 tickets can also be purchased for $45. There is one run inbound to the University at 7:00am and a return trip at 5:00PM. The service makes multiple stops in Elora-Salem /Fergus and Guelph.

Denny Bus Lines Ltd.

Denny Bus Lines Ltd. provides bus service every Thursday between Orangeville and Guelph. The bus leaves Orangeville at 9:30am and stops at various destinations including Alton, Erin and Hillsburgh

(depending on who calls in), with a final destination of Stone Road Mall in Guelph. The bus picks up passengers for its return trip at 3:45pm. Passengers must call to make a reservation at least 24 hours in advance. A return ticket from Orangeville is $9.25, with reduced rates closer to Guelph.

Voyageur Transportation Services

Voyageur Transportation Services is a private company that provides a range of transportation services. The company owns a dozen accessible buses that are used for transporting special needs children to/from school and for conducting patient transfers. Buses can be chartered for any use and charter rates will apply.

Key Stakeholders

Having developed an inventory of existing service providers, the next step in the process is to identify other stakeholders that can potentially contribute to the coordinated framework. This can include agencies that refer clients to or provide funding for a transportation service, municipalities that may operate or provide funding for part of the coordinated framework, employers, local service clubs, charities, citizen groups or others that have an interest in improving mobility within the community.

Each stakeholder group that will be involved in the partnership must have the ability to contribute to the coordinated framework, either in terms of funding, resources, or in-kind services. Within Wellington County, a number or potential stakeholders were identified through the on-line survey. Only stakeholders that have responded to the survey are shown and as a coordination partnership goes through the development process, more participants will need to be identified.

Centre Wellington Social Justice Group

For six months in 2013, the Social Justice Group partnered with a local school bus company to provide a fixed route bus service between Elora and Fergus. The service operated three times a day; three days a week. The program was funded through small grants. Service has been suspended in order to examine options for a more sustainable and effective funding model.

Township of Centre Wellington

The Township of Centre Wellington has identified transportation as a priority within the Township. Transportation needs have been identified for seniors, employees requiring transportation to and from work, and youth needing transportation for 'before and after' school programs. Sustainable funding for such transportation services has been identified as a key issue.

Town of Minto

The Town of Minto has also identified transportation as a priority, especially for seniors, persons with disabilities and workers accessing local employment. The Town is willing to consider funding support for transportation services if a business case is prepared.

County of Wellington - Ontario Works

Ontario Works is a program that provides support to people with a temporary financial need. The program assists people that are in financial need and/or require assistance with finding employment. To be eligible to receive assistance from Ontario Works, a client must need financial assistance right away to help pay for food and housing costs, and be willing to take part in activities that will help find a job.

The Wellington County Ontario Works program provides funding on an annual basis to assist people with transportation needs, especially related to finding employment. The Ontario Works program spends an average of $10,000 a year providing transportation services to clients. Depending on the situation Ontario Works may pay for a taxi, provide gas cards or public transit funding to the client. They also refer a number of their clients to existing services throughout the County. Under a coordinate partnership model, a key objective would be to assess whether or not this funding could contribute to enhancing existing transportation services that may directly benefit Ontario Works clients.

Senior's Centre for Excellence

The Senior's Centre for Excellence provides community programs for seniors and their caregivers. They also provide assistance with navigating the health care system and provide referrals to community support services. Approximately 35 percent of their clients are over the age of 80 and require transportation services. Currently, the Centre refers roughly 35 clients a year to the VON. At this time, they do not provide funding to their clients for transportation.

Wellington Terrace Long Term Care Home

Wellington Terrace is a long term care facility that provides a number of services to those staying at the home. The home owns an accessible van which is used to provide recreational outings for its residents. They also own a small van that is available to the families of their residents to use for special appointments or social outings. Wellington Terrace will also refer its residents to VON and taxi services. Under a coordinate partnership model, a key objective would be to assess the opportunity to make better use of this van to ensure it is fully utilized.

Caressant Care Harriston

Caressant Care Harriston is a long term care facility and home for seniors located in Harriston. Their residents are seniors with high levels of healthcare and personal care needs. Many of their residents require transportation to hospital or medical facilities for medical appointments. One of the biggest challenges is the cost of obtaining these trips. Many of the existing medical services required by residents are located in the larger urban centres and the cost per km for the service can be expensive for residents. The facility currently refers its residents to Saugeen Mobility, Voyageur Transportation Services, taxi service or ambulance service.

Heritage River Retirement Residence

Heritage River Retirement Residence is a retirement home located in Elora that houses seniors who are independent or require light nursing care and dietary needs. They would consider funding transportation service for their residents to use. Their residents require transportation service for social trips, medical appointments etc. within close proximity to the home. They currently provide a bus service on Tuesdays for their residents.

United Way Guelph Wellington Dufferin

United Way supports non-profit agencies in Guelph, Wellington and Dufferin County by funding community agency programs. Many of these programs require transportation support for clients in rural areas. While there are a number of programs being offered within Wellington County, it can often be difficult for people to access these programs.

St. Joseph Health Centre

St. Joseph's Health Centre provides social services to adults, seniors and persons with disabilities. They currently offer an adult day program for which they provide funding for transportation to and from the program for the participants using taxis. For other transportation services, they refer their clients to the VON. At this time they do not provide any funding for their day program clients to use other services such as taxis.

TG Minto Corporation

TG Minto Corporation is an auto parts manufacturing company located in the Palmerston area. The company employs over 600 employees for shift work Monday through Friday. Like many employers located in rural areas, the company has had some challenges attracting and retaining employees due to a lack of transportation services. A number of their potential prospects live in the Region of Waterloo and the City of Guelph and do not have access to a private automobile (since both cities have a transit service). The partnership would benefit from including companies like TG Minto in the transportation working group, with the potential of contributing funding for an employee targeted shuttle service.

Musashi Auto Parts

Musashi Auto Parts is an auto manufacturing company located in the Arthur area. Similar to TG Minto, the company has difficulty attracting and retaining qualified employees due to lack of transportation services. Under a coordinated partnership model, a key objective would be to explore a partnership with Musashi to supply funding for the provision of transportation services.

Summary

The on-line questionnaire and follow-up stakeholder workshop revealed a number of existing transportation services in Wellington County and opportunities to improve service. These are assessed in Step 3 below.

STEP 3 Identify Service Demand and Gaps/Implementation Issues and Opportunities

The purpose of Step 3 is to expand on the data gathering completed in Step 2 to determine service demands and gaps as well as implementation issues and opportunities. This will help determine the type of coordination model that should be implemented or whether coordination is a feasible solution. In certain cases, the problem is a resource issue which is better solved through additional funding rather than coordination.

Service Demand and Gaps

A number of gaps in service were identified as part of the consultation process. These were prioritized by the consulting team based on interviews with stakeholders and through the survey results. This should be confirmed by the partnership through a more detailed review of travel patterns and the number of trips not accommodated.

1. **Trip Purpose:** The majority of trips provided are aimed at seniors and persons with disabilities. Based on discussions, there is a strong demand for other types of trips that are not being accommodated. This includes:
    a. **Students:** to allow them to participate in after school programs or attend part-time employment.
    b. **Employees:** many employers are having challenges attracting and retaining employees, particularly those that live outside of Wellington and commute into the county. TG Minto Corporation and Musashi Auto Parts are prime examples.
    c. **Social Trips:** Medical appointments are the number one priority for most community care agencies. Often social trips or everyday living trips cannot be accommodated.
2. **Capacity Issues:** A number of existing agencies indicated a general challenge in meeting all trip requests. This is due to the lack of resources, primarily drivers to operate vehicles.
3. **Eligibility:** The largest provider of transportation service is focused on seniors and persons with disabilities. There are fewer options available for adults and students/children.
4. **Geographic Availability:** The majority of existing services within the County are focused around Fergus/Elora in Centre Wellington. This makes sense as this is the largest urban centre within

the County. However, residents in other areas of the County also require transportation services. The biggest gap identified is in the northern municipalities in the County.

Implementation Issues and Opportunities

A number of implementation issues and opportunities were also identified as part of the consultation process. These are important to understand as they have a direct influence on the type of coordination model selected. These include:

Implementation Issues

1. **Mandates/Funding Constraints:** A number of existing service providers only provide service to seniors and persons with disabilities (e.g. VON). Their mandate is tied to funding received from the LHIN. This reduces their ability to partner with other organizations and maximize the use of their vehicles (i.e. by allowing adults to share rides with seniors).
2. **Funding Levels:** Sustainable funding is an issue for a number of existing providers. The Centre Wellington Social Justice Group provided a fixed route bus service between Fergus and Elora for six months. While the service was popular, it has been suspended until a more sustainable funding source can be discovered.
3. **Driver Availability:** There are not enough drivers to operate existing vehicles throughout the County. The majority of existing providers use volunteer drivers to provide service and there are few paid drivers operating agency owned vehicles. Additional drivers are needed in order to make full use out of the available vehicles and resources, however, funding is also an issue to pay for additional drivers.

Opportunities

1. **Existing Coordination:** The Community Resource Centre of North and Centre Wellington, VON, Fergus Elora Seniors Trans, Cancer Society, East Wellington Community Services and Canadian Mental Health already coordinate trips through a central referral point: Wellington Transportation Services. Parties in need of transportation can call a 1-800 number and are referred to the appropriate agency based on responses to three screening questions. This culture of existing coordination will assist in the development of a coordinated framework.
2. **County Support:** The County already contributes some funding to transportation services and has shown a willingness to address transportation issues. There are concerns about funding new programs from a limited tax base and availability of staff to support new programs. The cost effectiveness of improving rural transportation would have to be addressed.
3. **Guelph Transit:** Guelph Transit has a new scheduling software program that is used to coordinate all of its paratransit services. The transit system also has significant expertise in dispatching and scheduling. This may be a resource a future partnership could use.

4. **Private Operators:** There are a number of private operators that provided scheduled fixed route services between Fergus/Elora and Guelph and Orangeville and Guelph at reasonable rates. There is an opportunity to build on this network through coordination.
5. **Provincial Gas Tax Funding:** None of the municipalities within the County receives provincial gas tax funding. The County could benefit from a significant increase in revenue towards transit services if they were responsible for (directly or through agreement with another transportation provider in the partnership) the delivery of public transit or community transportation services. This revenue could be used to expand services to meet the various gaps in the community.

STEP 4 Assess Different Levels of Coordination

The review of existing transportation services within Wellington County revealed a desire among several organizations to improve rural transportation. There is already some coordination taking place through Wellington Transportation Services, a collaborative network of community service providers. The existing services within the County are also fortunate to have a number of resources, such as their own vehicles and a pool of volunteers. Finally, no existing transportation service in the County is benefitting from provincial gas tax funding. There is the opportunity to potentially access this funding when developing a coordination model.

The four coordination models were assessed to determine their applicability within the County of Wellington. The lead partner for Models 1 through 3 is not known at this point and would need to be confirmed by the Transportation Coordination Working Group.

Model 1: Centralized Control

This model represents the highest degree of coordination and would involve a lead partner taking over all aspects of transportation on behalf of the partnership. Existing transportation service providers such as the VON, Fergus Elora Seniors Trans and East Wellington Community Services that were not identified in the lead role would transfer ownership of their vehicles, operating resources and funding earmarked to transportation services to the lead partner.

The benefit of this model for Wellington is that it provides the highest degree of coordination as the entire fleet would be available and decisions would be made that maximize the efficiency of the trip. This model also allows the

various agencies to focus their efforts on the key elements of their mandates which are not transportation related.

The disadvantages of this model are that there is no clear partner that would fill this role:

- The County does not own any vehicles and has no experience with transportation operations;
- There are too many agencies each with different mandates. Many organizations have different boards that they are accountable to, including municipalities and national organizations (i.e. the VON). Creating a Central Coordination Model would impact these reporting structures and require too many stakeholders at the table;
- It may jeopardize funding provided by the LHINs, which is earmarked for seniors and persons with disabilities, whereas the model would provide general transportation for all residents in need of service.

For these reasons, this model is not recommended.

Model 2: Brokerage – Central Coordination

In this model, the lead agency is responsible for the planning, scheduling and dispatch of transportation services. Delivery of trips continues to be completed by each of the partner organizations.

The benefit of this model for Wellington is that is maximizes the potential for coordination without requiring the County or the lead partner to get into the business of vehicle purchases and operations. The role of the lead partner, instead, would be as a coordinating body for all trips. It also allows various different mandates to be retained.

If the County was selected as the lead partner, the disadvantage is that the County has no experience with transportation coordination. A potential solution would be to have an existing scheduler/dispatcher from one of the partner agencies perform this function or the service could be contracted out. If desired, the County could retain more of an administrative role.

For these reasons, it is recommended that this model be carried over by the coordination working group for further review.

Model 3: Brokerage – Confirmation-Based Coordination

This model is similar to Model 2. The big difference is that in this model the lead partner must confirm the booking of any coordinated trips with the partner agency providing the service before it is confirmed. The advantages and disadvantages are similar to the Model 2. The difference is the extra step required to book a trip and that the opportunity for coordination is less than in the Brokerage –Central Coordination Model.

This may be an appropriate model to explore for Wellington County, particularly as trust is built during the partnership. For these reasons, it is recommended that this model be carried over for further review.

Model 4: Voluntary Cooperation

This model is the first step toward greater coordination and is already occurring in Wellington County. The Community Resource Centre of North and Centre Wellington, VON, Fergus Elora Seniors Trans, Cancer Society, East Wellington Community Services and Canadian Mental Health are already coordinating some trips through a central referral point (customers that call a 1-800 number are referred to the appropriate agency based on responses to three screening questions).

The disadvantage of this model is that there is little role for Wellington County. The main advantage of Wellington County as the lead is the potential to access provincial gas tax funds. This will only occur if the County is responsible for the partnership.

Adopting this model would not lead to a noticeable improvement in efficiencies and level of service to customers.

STEP 5 Identify the Building Blocks of the Preferred Coordination Models

In Step 4, two of the four coordination models were considered for further review: Model 2: Brokerage Model - Central Coordination and Model 3: Brokerage Model – Confirmation-Based Coordination.

With these models in mind, each of the building blocks that make up a coordinated transportation framework will need to be assessed by the partnership working group. This includes service delivery,

scheduling and dispatch, vehicle maintenance, etc. The application of each of these building blocks to the preferred Wellington County model is documented below.

Service Planning

Under both models, the lead partner would be responsible for service planning. Since the County does not have the expertise in-house, it would use the experience available in the partnership for ongoing planning of services and/or could bring in outside expertise to assist (particularly during the start-up).

Key activities that would form part of this function include:

1. Working with private bus carriers to establish scheduled fixed route services between urban centres within and adjacent to the County.
2. Establishing a coordination plan that would use the various demand responsive services as feeders for the scheduled fixed routes.
3. Working with Guelph Transit to establish potential for service integration between Wellington and Guelph Transit services.
4. Working with Saugeen Mobility and Regional Transit to establish potential integration with this service provider for the northern municipalities.

Coordinated service planning is required under the Brokerage - Central Coordination Model and optional under the Brokerage – Confirmation-Based Model, however, it is still recommended.

The function is fairly easy to implement with the assistance of outside expertise or experience within the partnership. Step 6 below provides some preliminary recommendations of options that the partnership group should begin to explore.

Improving connectivity between the different types of services identified above will also increase the effectiveness and efficiency of all services and provide additional capacity to meet the needs of more residents. There may be an initial cost to hire outside expertise to develop a service plan.

Customer Service / Intake Process / Scheduling and Dispatch

These three functions are assessed together because they all involve the partnership setting up a central office that will be the main interface point for customers requesting trips or getting information about the service.

This would be the responsibility of the lead partner. In choosing a lead partner, it is important to have someone with experience in operating transportation services take a lead role in this (e.g. the Community Resource Centre of Centre and North Wellington which currently has 1.5 FTE transportation coordinators). There is currently an existing central information number in place which County residents

use to access transportation services across the County. This number or office can be used and expanded on as part of the central customer service / intake and scheduling and dispatch office.

There are currently 40,000 to 50,000 demand responsive rural transportation trips being delivered annually in Wellington County by a variety of service providers. Most of this service is provided for seniors and persons with disabilities, with priority given to medical trips. Demand for trips is likely two times greater than what is being supplied today and some markets are not served at all.

At this level of annual ridership a centralized scheduling software program would be beneficial to enhance the number of shared trips. The use of this software can increase the efficiency of service delivered by as much as 15 percent.

The scheduling program would also be useful for coordinating trips between demand responsive services and any new scheduled fixed route corridor service that may be implemented. This helps minimize resource requirements for long-distance trips within the County.

There are relatively simple programs that cost up to $1,000 per month that could be used initially if budgets are limited. For a more robust program, the initial fee is upwards of $70,000 with annual licensing fees. This large upfront capital investment can be challenging for a municipality to take on and may be dependent on a grant program or outside funding from the province (e.g. Community Transportation Pilot Program).

Centralized customer service is a logical extension of the centralized reservation/dispatch office. Initial calls regarding passenger inquiries, complaints or compliments should be handled by the central office, and potentially redirected to one of the partner agencies, depending on the extent of the issue.

For the intake process, this will require more investigation between the partners involved in the coordinated framework. At this point, it is recommended that client intake still be conducted by each partner agency, particularly given some of the difference in eligibility criteria. However, information about all transportation programs should be made available on the central website to inform residents about the options available to them. If calls are received regarding client registration at the central reservation/dispatch office, they could be directed to the right agency partner by asking two to three clarifying questions to determine potential eligibility. As trust develops and eligibility becomes more standardized, this function could be transferred to the central agency.

Given the volume of calls that currently take place, it is recommended that the central dispatch office be staffed with 3-4 reservationists / dispatchers and customer service staff (Transportation Coordinators). Under the Brokerage Model, some of the existing transportation coordinators could be trained to perform these roles. This would lead to a reduction in the number of existing staff required to perform this function. Under the Confirmation Based Brokerage Model (Model 3), there is less of a savings in

staff time since each partner agency providing service would likely be involved in transportation coordination.

Marketing / Awareness

It is recommended that a central brand be developed for the partnership. Based on initial review, there is already a strong awareness of transportation services for seniors and persons with disabilities through the 1-800 number provided by Wellington Transportation Services. However, if the partnership is going to expand to be more inclusive of adults and students, a central brand and awareness campaign should be developed. This will help garner support for the partnership in Wellington County.

To maintain a local connection, the support provided by each partner in the organization should be identified in marketing and communications material. This is especially important in the initial stages of the partnership.

Some initial funding would need to be put in place to develop a brand and communication strategy. Outside marketing and branding expertise may be sought.

Eligibility Criteria

The partnership will need to review the eligibility criteria of all participating agencies. Where the eligibility criteria are similar, efforts should be made to standardize. This increases the ability to coordinate trips between differ partners in the network.

Policies and Procedures / Passenger Fares

The policies and procedures of each of the partners will need to be reviewed once they have confirmed their participation in the partnership.

The ability to standardized passengers fares and kilometre rates will also help enhance the ease in which coordination takes place.

Vehicle Purchase, Vehicle Maintenance, Driver Training

Based on the initial review, there are approximately 7 accessible buses and 4-5 vans available to provide service throughout the County. Currently, there is no consistency in the type of vehicle, with some being vans and others being mobility buses. Private carriers that would be contracted to operate fixed route services own and maintain their own vehicles.

Unless there is a significant expansion in the number of vehicles, there is no real benefit to coordinating vehicle purchases. However, vehicle specifications should be reviewed and agreed to by the partnership to ensure all future vehicles are consistent in their ability to accommodate passengers with mobility devices.

There is some value in developing a standard driver training program that could be used for paid drivers and volunteers. This would ensure that all drivers have the same safety and customer service training.

Volunteer Recruitment and Training

At the initial stages of the partnership, coordination of volunteer recruitment may be a challenge, particularly if the Partnership brand is no longer associated with a local agency. This function should be addressed in later years of the partnership.

STEP 6 Select a Preferred Coordination Model

Within Wellington County, it is recommended that either Brokerage Model (Central Coordination or Confirmation Based) be explored. The partnership would be between the County, participating local municipalities, social service agencies and employers. Private sector bus operators would be used to enhance corridor or fixed route service, but would not form part of the partnership.

To be successful, it is recommended that the County act as a coordinating body for the partnership group. In this role, it would participate in service planning and would approach the province to receive provincial gas tax funding. This funding must flow through a municipality.

A lead partner would also need to be selected to schedule and dispatch trips, handle customer service requests and monitor the service. Other partner agencies would contribute through funding, in-kind use of vehicles, resources and/or expertise. The lead partner would not take ownership of any of the vehicles.

Given the service needs and gaps identified in Step 4, it is recommended that two working groups be formed to address immediate coordination opportunities as well as the need for improved services for students and employees seeking to access major employers in the County.

Based on the above review, the following opportunities should be explored by each of these working groups to improve transportation services in Wellington County:

Coordination Opportunities

Within the coordinated framework, one working group of existing service providers could be set up to assess the opportunity to work with the County to improve the demand responsive services already in place. This working group would work from the bottom-up to build on existing coordination and keep the momentum going. There are some additional aspects of coordination that could be easily implemented within these existing services. These include:

1. **Purchase Centralized Scheduling Software:** Investigate the purchase of a scheduling software program. The program could be purchased separately or obtained through an agreement with Guelph Transit (which already has acquired the software) to assist with scheduling and dispatching of trips within the framework.
2. **Partnership with Adjacent Transit Providers:** It is also recommended that a partnership with Guelph Transit be investigated. This would allow for seamless passenger transfers and potentially service schedule coordination. The County's demand responsive and fixed route services could coordinate their trips at local Guelph Transit terminals to ensure seamless transfer between the services.

Potential New Services

A second working group should be created to assess the feasibility of expanding on the fixed route service between Fergus/Elora and the City of Guelph as well as exploring employee shuttle services to major employers particularly in the north of the County. This group would take a top-down approach to service planning with a goal of improving transportation services for youth and those looking to access employment areas. This group would also need to identify new funding sources or partnerships to provide the service improvements. Some potential improvements for this group to explore include:

1. **Implement Corridor Services:** Explore the opportunity to extend the number of runs that operate between:
    - Fergus/Elora and Guelph (existing Eliot Bus Lines service);
    - Orangeville and Guelph via Hillsburough, Erin and Rockwood (existing Denny Bus Lines service);
    - Morriston / Aberfoyle and Guelph (potential new service).

    The passenger fare for the two existing services is $4.50 to $4.75 for a one-way trip. This is about half the fare of the same service operated by a demand responsive service (based on a $0.41 per km rate)[13]. For this to be successful, opportunities to transfer passengers from the existing demand responsive services (e.g. provided by the VON) to these scheduled corridor services should be explored.

    This can be through a physical transfer for passengers living outside of the immediate urban areas of Fergus/Elora, Hillsburough, Erin and Rockwood or by operating a flex-route service while these urban areas. Denny Bus Lines already operates as a Flex Route. Customers are required to call 24 hours in advanced to book the service. The route is flexible based on passenger demands.

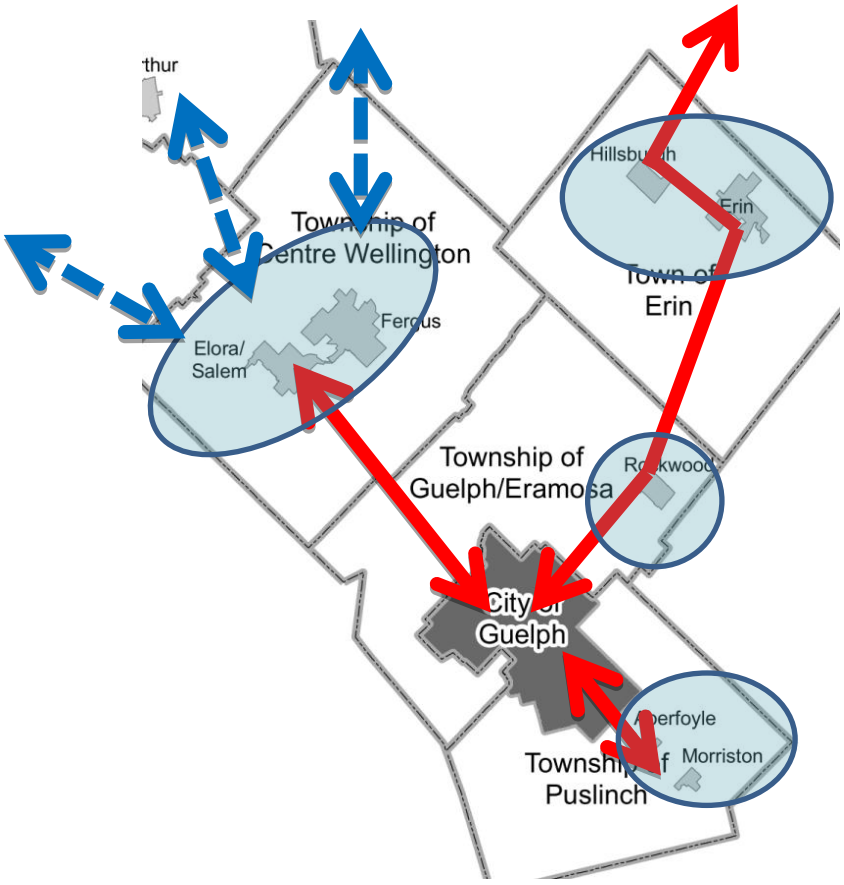
[13] Potential fare parity issues under the AODA legislation should be reviewed before proceeding with this option.

The lead transportation coordinator would need to work closely with Eliot Bus Lines and Denny Bus Lines to schedule trips on this fixed route. A determination would be made about the number of passengers required to make the service sustainable. This also benefits the demand responsive provider by freeing their vehicles to accommodate more trips for their clientele.

For new services such as the Morriston / Aberfoyle corridor, a bus operator would need to be found and more research conducted on the potential demand. An extension of Guelph Transit or GO Bus service may be a logical choice for this corridor.

A review of existing passenger demand to Guelph would help establish the potential demand. A target of 10 to 15 passengers per trip should be established.

Figure 3 - Potential Corridors Services in Wellington County



2. **Employer Shuttle Services:** There are some employers within the County who recognize the importance of a transportation option being available to support their employees. Custom-

designed employee shuttles can be effective if they are well integrated with existing public transit services (where available) and if they are supported by both employees and the employers. An approach to employee shuttles might involve a three-way sharing of costs among employer, employee and municipality with a service planned and delivered by a private contractor based on an employee survey and the start/stop times of the employer.

Although each coordination group will have a different mandate, it will be important that both groups continue to communicate on a regular basis. The demand responsive services could operate as effective feeders to an improved fixed route/employee shuttle service and contribute to the sustainability of these services.

As an example, a shuttle to TG Minto in Palmerston would begin in Guelph or Waterloo and could use one of the vehicles owned by the partnership. With a 7:30am shift time, there is not too much demand for service for seniors during this time. Once the vehicle drops off employees, it can be used locally to provide demand responsive trips within North Wellington. Midday runs could continue to use an agency owned vehicle or could be contracted to one of the private carriers, depending on the needs of the vehicle. A flex route strategy could be used in that other passengers heading to Guelph from the north could board the bus. This would help keep the service sustainable.

3. **Charter Services:** Opportunities to partner with various retailers, adult day centres, or other programs should also be explored by the working group. A well-advertised program that provides a bus service to major destinations on certain days of the week could be explored. This is similar to the Denny Bus Lines Thursday service between Orangeville, Hillsborough, Erin, Rockwood and the Stone Road Mall in Guelph. Similar charters can be established on specific days of the week from different areas of the County to grocery stores, shopping malls, dentists, clinics, etc. This is a very effective transportation demand management tool to group passenger trips headed to the same destination. It also frees up existing demand responsive services to perform other functions.[14]

4. **Use of Taxis:** The County has over 18 taxis licensed to provide service in the community. The working group should explore the number of local trips conducted within some of the larger urban areas in Wellington (e.g. Fergus / Elora) and explore the potential to have the service delivered by the taxi industry. There may be the ability to negotiate a preferred flat rate for in-town trips based on the volume of trips that are anticipated. For eligible passengers, they would

[14] Potential fare parity issues under the AODA legislation should be reviewed before proceeding with this option.

pay a flat fee and the partnership would subsidize the remaining part of the fare. This approach is successfully used in Stratford, where eligible passengers pay a flat fare of $5.50 and the Community Care Agency pays the difference between the passenger fare and the preferred taxi rate fare of $7.00. In this situation, the use of taxis is more cost effective than providing the service using agency owned vehicles and it allows those vehicles to be better utilized for long-distance trips.

Next Steps

For the coordination model to be successful, leadership is required. It is suggested that a working group of existing demand responsive service providers be formed to further develop immediate opportunities (within their span of control) in the areas outlined above.

It is recognized that there are gaps and travel markets not being addressed by the existing services and that the expansion of the fixed route service may provide a strong core service to address these deficiencies. This expansion may require new funding (e.g. gas tax support) and new partnerships (e.g. employer shuttles). Hence a planning-oriented working group should be formed to assess and address these opportunities and challenges.

DUFFERIN COUNTY

OHCC · CCSO
Ontario Healthy Communities Coalition
Coalition des communautés en santé de l'Ontario

Ontario Trillium Foundation
Fondation Trillium de l'Ontario
An agency of the Government of Ontario.
Relève du gouvernement de l'Ontario.

RURAL ONTARIO INSTITUTE
Vision, Voice and Leadership

DILLON CONSULTING

7.2 Dufferin County

Background / Context

Dufferin County is located in south-central Ontario, approximately 100 km north-west of downtown Toronto; bordered by Grey County to the northeast, by Simcoe County to the north and east, by the Regional Municipality of Peel to the south, and by Wellington County to the south and to the west. The County is commonly known as the headwaters area of Ontario, since it offers the source of five major river systems in the Province: the Credit, Humber, Grand, Saugeen and Nottawasaga.

Dufferin County has a population of 56,881 located within an area that spans 1,487 square kilometres. The County contains three towns and five rural townships. These are the:

- Town of Orangeville;
- Town of Shelburne;
- Town of Mono;
- Township of Amaranth;
- Township of East Garafraxa;
- Township of East Luther Grand Valley;
- Township of Melancthon; and
- Township of Mulmur.

Figure 4 illustrates the County and the location of its eight local area municipalities.

Figure 4 - Dufferin County Map

(Source: Dufferin County)

Each municipality has its own unique characteristics, including demographics, employment base and transportation needs. The largest town within the County is Orangeville, followed by Mono and Shelburne. **Table 9** provides a summary of the size, employment, population and population density of each municipality within the County. In 2011, Dufferin County had a population of 56,881. This represents a 4.5 percent increase from the 2006 census.

Table 9 - Population Density Summary

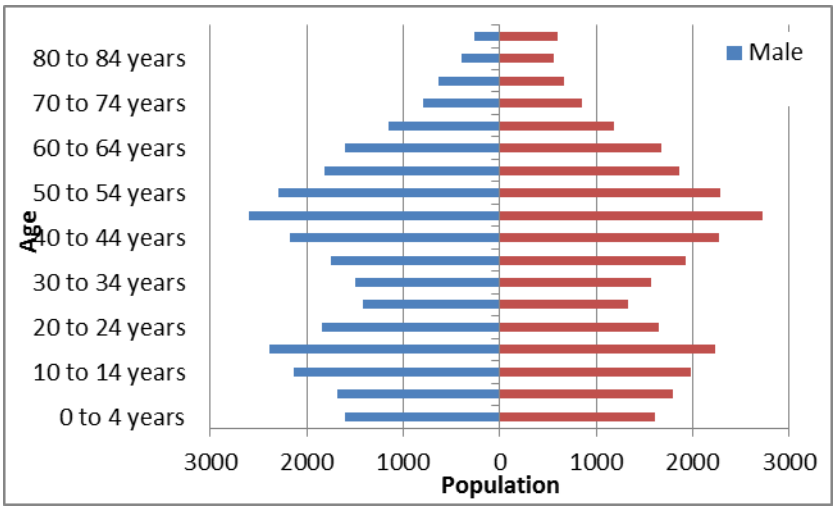
Municipality	Land (sq. km)	2011 Population	2011 Employment	Population Density/(sq. km)
Orangeville	16	27,975	14,681	1,791.6
Shelburne	6	5,846	2,866	907.1
Mono	278	7,546	1,851	27.2
Amaranth	265	3,963	701	15.0
East Garafraxa	166	2,595	295	15.6
East Luther Grand Valley	158	2,726	634	17.2
Melancthon	311	2,839	332	9.1
Mulmur	287	3,391	640	11.8
Dufferin County	**1,487**	**56,881**	**22,000**	**38.3**

(Source: Statistics Canada National Household Survey 2011)

Approximately half of the County's population and two-thirds of the County's employment is located within the Town of Orangeville. The Town of Shelburne also has a large concentration of population and employment. While Mono has the second highest population in the County, it is spread over a large geographic area making it difficult to service by transit.

Figure 5 displays the County's population by age and sex. Twenty-seven (27) percent of Dufferin residents are under 19 years of age and approximately 12.5 percent of the population is over the age of 65. This is slightly lower than the provincial average of 14.6 percent.

Figure 5 - Dufferin County Population Pyramid



(Source: Stats Can 2011 Community Profiles)

Dufferin County is expected to experience some population and employment growth. Under the 2006 Places to Grow Plan, Dufferin County has been forecasted to grow to approximately 80,000 by 2031. The

majority of this growth will occur within the three towns in the County, in addition to the urban part of East Luther Grand Valley.

Employment growth is also expected to occur. Total employment growth from 2006 to 2031 is expected to grow by 7,000, or 32 percent. Two-thirds of the County's employment is located in Orangeville, and this will also see the largest growth by 2031 (just under 4,500). The second largest employment concentration is located in the Town of Shelburne.

The majority of the County is rural agricultural land with small urban areas complete with commercial, industrial and institutional development as well as growing residential developments. The agricultural history of Dufferin is long and its presence is still strong throughout the County. The local equine industry is also thriving. Dufferin's urban centres (Orangeville and Shelburne) also boast high concentrations of manufacturing, professionals and cultural outlets. Manufacturing is the major employer of the County's workforce, representing more than 18 percent of the total. There are some small manufacturers in the scattered rural areas; however, the business parks located within the larger urban areas have the greatest concentrations of employers. These areas are located in the south-west of Orangeville and the south-east of Shelburne.

Table 10 provides more detail about the distribution of the forecasted population and employment growth for each of the lower-tier municipalities.

Table 10 - Dufferin County Population and Employment Projections

Municipality	Population		Employment	
	2011	2031	2011	2031
Dufferin County	56,881	80,000	22,000	29,000
Orangeville	27,975	36,490	14,681	19,171
Shelburne	5,846	10,000	2,866	4,235
Mono	7,546	9,770	1,851	2,387
Amaranth	3,963	4,680	701	685
East Garafraxa	2,595	3,150	295	322
East Luther Grand Valley	2,726	7,478	634	1,170
Melancthon	2,839	3,410	332	273
Mulmur	3,391	4,290	640	757

Source: County of Wellington Official Plan

As seen in **Table 10**, the Town of Orangeville will see the highest growth in population growth by 2031 (8,500), followed by East Luther Grand Valley (4,700) and Shelburne (4,150). This represents 75 percent of the population growth planned to occur in the County. Eighty-four percent of employment growth will occur in Orangeville (4,500) and Shelburne (1,400) by 2031.

STEP 1 Identify Two or More Organizations that Share a Common Goal

During the Dufferin County stakeholder workshop, a number of organizations expressed an interest in being part of the solution and improving transportation services in Dufferin County. They also expressed a desire to work together to assess whether a coordinated framework is right for them. While there were a number of agencies that expressed a desired for improved transportation services, only those that currently provide transportation or have the ability to fund or resource transportation services are listed below:

1. **Dufferin County Community Support Services** – There is strong interest in improving transportation services for residents, particularly for seniors and persons with disabilities. The agency owns a number of vehicles and provides transportation service to their clients.
2. **Local Municipalities** – Representatives from the Town of Shelburne and Orangeville Transit attended the stakeholder workshop and expressed an interest in improving rural transportation services. The Town of Shelburne expressed a desire to enhance transportation services to support employees getting to work. The Town of Orangeville currently provides public transportation services, and there may be a potential to integrate with this service.
3. **Headwaters Communities In Action –** A citizens group with a mandate to support the well-being for the Headwaters Region. The group has already begun to create a transportation services database and have done some marketing to create more awareness of services available in the County.
4. **Employment Services –** There was an interest from the Centre for Career & Employment Services to improve transportation services to access employment within the County. The later offers limited funding for their clients to access transportation services.

Confirmation of this group would need to take place through a series of working sessions and a commitment to work together documented through a memorandum of understanding. A lead organization would also need to be identified as a next step. Dufferin County Community Support Services as the lead agency would provide strong leadership to motivate everyone and keep the momentum going. Through the County, there may be opportunity to provincial gas tax funds which could be used to enhance service levels as part of the partnership.

STEP 2 Inventory Existing Transportation Services and Key Stakeholders

The next step in the process is to better understand transportation services that already exist as well as the various stakeholders and their ability to contribute to the transportation solution.

While Dufferin County does not provide a county-wide public transit service, there is a mix of municipal, provincial, and other transportation services that operate within the community.

The inventory of existing transportation service providers was conducted to identify the extent of service currently being provided within Dufferin County. **Table 11** provides a brief summary of existing services as identified through background research and the online survey conducted as part of this study region assessment. As identified below, there are limited subsidized transportation options within Dufferin County.

It is important to note that the results presented below may be incomplete as not all organizations participated in the online survey. Where survey results were not obtained, a basic description of the service is provided.

Table 11 - Existing Transportation Providers in Wellington County

Organization	Type
Orangeville Transit	Municipal Transit
GO Transit	Inter-Regional Transit
Dufferin County Community Support Services	Community Agency
Ontario Early Years Centre	
Caledon Community Support (Transportation)	
Canadian Cancer Society	Health Agency
Wellington-Dufferin Student Transportation Services	School Board Transportation
Able Transport	Private Service Provider
Home at Last	
Ontario Patient Transfer	
RNR Patient Transport Services	
The Shelburne Transporter	
Orangeville Taxi	
Wellington-Dufferin Student Transportation Services	

Orangeville Transit

Orangeville Transit is the largest public transit operator in Dufferin County. It provides service throughout the Town of Orangeville along three fixed routes that serve designated stops. All routes travel through the downtown area along Broadway and converge at the transfer point on Fourth Street. Service is provided at regular half-hour intervals between 7:15am to 6:15pm, and operates daily except on Sundays and statutory holidays.

KEY CHARACTERISTICS

Organization Type: Municipal

Operating Model: Fixed Route

Annual Ridership: 112,000

Vehicles Owned: 1 40-passenger bus, 3 25-passenger buses; all accessible

Eligibility: Open to all residents.

Geographic Focus: Town of Orangeville

The base adult cash fare for the service is $2.00 for adults and $1.50 for students and seniors. Children under five years of age ride free. The system recovers approximately 22 percent of its expenses through fares.

The service's operations are contracted out by the Town of Orangeville to First Student Canada. This organization employs nine drivers, three of whom are part-time and six of whom are full-time. First Student is also responsible for vehicle fleet maintenance.

The service has an annual ridership of 112,000. Ridership has grown by 36 percent between 2006 and 2012. Based on comments received, there is a demand for service on Sunday.

GO Transit

GO Transit is the only inter-regional public transit operator in Dufferin County. It provides bus service along one route that connects the Orangeville to Brampton, with connections available to other parts of the Greater Toronto Area by bus and train. All routes travel along Highway 10 and serve three stops: along Broadway, the Orangeville Mall and the terminus at the Orangeville GO Park & Ride. Service is provided six times per weekday in both directions, with most trips timed to serve commuters heading to the GTA (i.e. southbound in the morning peak, northbound in the afternoon peak). No weekend service is available.

KEY CHARACTERISTICS

Organization Type: Provincial

Operating Model: Fixed Route

Annual Ridership: ~17 million (bus trips, system-wide, 2013)

Vehicles Owned: 466 buses (system-wide)

Eligibility: Open to all residents

Geographic Focus: Town of Orangeville

The base adult cash fare for the service to downtown Toronto is $11.15 for adults and students and $5.60 for seniors and children. Based on comments received, there is a demand for the service to be operational on Saturday and Sunday, which would permit travel to/from Dufferin County via public transit on weekends.

Dufferin County Community Support Services

Dufferin County Community Support Services operates demand responsive transportation services for seniors and adults with disabilities within Dufferin County. Their fleet includes two accessible vans and two regular vans, which are driven by staff. Certified volunteers also provide transportation service using their own vehicles.

KEY CHARACTERISTICS

Organization Type: Community Agency

Operating Model: Demand Responsive (paid drivers in agency owned vehicles and volunteer program)

Annual Ridership: 10,000

Vehicles Owned: 2 accessible minivans, 2 non-accessible minivans, 1 accessible bus

Eligibility: Seniors and Adults with Disabilities

Geographic Focus: Dufferin County and key destinations outside the County

Approximately 10,000 trips are made annually with primary services occurring Monday to Friday, between 8:30am and 4:30pm. Medical calls are prioritized, but eligible residents can also use the service to access social events, recreation, and shopping. Trips can be taken both within Dufferin County and to key inter-regional destinations such as Toronto, Brampton or Barrie. Passengers pay a standard fee for in-town trips ($7.00 return) and a per km rate for out-of-town trips (41 cents/km).

The agency employs five paid part-time drivers that use one of five agency owned vehicles. There are also 15 volunteer drivers that use their own vehicles to help provide mobility to eligible clients.

Funding sources include the Ontario Ministry of Health & Long-Term Care, Dufferin County and passenger fares.

Ontario Early Years Centre

The Ontario Early Years Centre operates demand responsive transportation services within Dufferin County for children up to the age of six and their caregivers. Their fleet consists of one regular van, which is driven by staff and certified volunteers.

KEY CHARACTERISTICS

Organization Type: Community Agency

Operating Model: Demand Responsive (paid drivers in agency owned vehicles and volunteer program)

Annual Ridership: Unknown

Vehicles Owned: 1 regular van

Eligibility: Children aged 0-6 and their caregivers

Geographic Focus: Dufferin County

The van is used primarily on Mondays to Thursdays, between 8:30am and 4:30pm to transport children and their caregivers between their homes and the centres, located in Orangeville, Shelburne, and Grand Valley. Passengers do not pay any fee for the service, but must book in advance.

Funding sources include the Ontario Ministry of Education as well as Dufferin County.

Wellington-Dufferin Student Transportation Services

Wellington-Dufferin Student Transportation Services is a consortium of five school boards providing transportation for eligible students living in Wellington and Dufferin Counties. Buses and drivers are provided by 12 bus companies throughout the district. The bus drivers, who are employed by the operators, receive extensive driver, safety and first aid training. In addition, five cab companies provide school transportation for students with special needs. In Dufferin County, First Student and Stock Transportation serve the Orangeville area, while Davidson Bus Lines Ltd. serves the Grand Valley area.

Caledon Community Services Transportation

Caledon Community Services provides door-to-door accessible transportation service seven days a week to residents of Caledon that are seniors and persons with disabilities over 16 years of age who are unable to drive on their own. Rides are provided in either a wheelchair accessible bus, one of seven passenger vans, or through volunteer transportation.

While the service is not for Dufferin County residents, it will transport its own residents to Orangeville to the north and other municipalities in the Greater Toronto Area. The potential does exit to coordinate services with Dufferin County Community Support Services.

Canadian Cancer Society

The Canadian Cancer Society provides transportation services for all Cancer patients to help them get to cancer-related care. The service is provided using a volunteer driver that will pick up patients and take them to their local hospital or regional cancer centre for treatment. There will be a one-time fee of $100.00 that is charged for patients, which is waived for those unable to pay and clients under 18 years if age. Service is available Monday to Friday between 8:00 am and 3:00 pm, with booking required at least three business days in advance of the trip.

The Shelburne Transporter

The Shelburne Transporter provides demand responsive transportation service for individuals to medical appointments who are unable to access public transportation and have no family or friends that can assist with transportation.

Transportation is provided 24 hours a day, 7 days a week to residents of Dufferin County to Peel Region, North within 40 kms of Highway 10 and 89 and to Simcoe County.

Vans are not wheel chair accessible and clients with wheelchairs must be able to walk in and out of the van. A fee is charged for the service, with assistance is provided by ODSP, WSIB and Insurance Companies.

Orangeville Taxi

Taxi service in Dufferin County is provided by Orangeville Taxi. The company operates throughout the county and has a fleet of vehicles that includes regular sedans, accessible vans, and airport limousines. Community support organizations often refer clients to Orangeville Taxi's services, and provide assistance with fare payment. Orangeville Taxi also accepts reimbursement from ODSP, WSIB, and various insurance companies.

Shelburne Taxi

The Town of Shelburne currently has three taxi licenses in place and is considering adding two more. They provide service to residents in the area.

Medical Transfer Providers

Several organizations provide service to individuals who are unable to access public transportation and do not have family or friends that are able to assist with transportation to and from hospitals and medical facilities. The following companies provide specialized medical transfer services using their private, accessible vehicle fleets:

- Able Transport Limited;
- Home at Last;
- Ontario Patient Transfer; and
- RNR Patient Transfer Services.

Key Stakeholders

The next step within the process is to identify other stakeholders that can potentially contribute to the coordinated framework. These can include organizations that refer clients to or fund a transportation service, municipalities that will operate or fund part of the coordinated framework, or other groups that have an interest in improving mobility within the community.

Each stakeholder group that will be involved in the partnership must have the ability to contribute to the coordinated framework, either in terms of funding, capital or resources, or in-kind services.

Within Dufferin County, a number or potential stakeholders were identified through the online survey. Since transportation providers within the County are listed above, this section lists other potential stakeholders. As with the list above, the list represents only stakeholders that have responded to the survey. As the partnership goes through the process, more stakeholders will likely be identified.

Community Living Dufferin

Community Living Dufferin (CLD) provides residential, employment, and recreational/leisure support to adults with developmental disabilities. CLD also operates several group homes and transitional living facilities, in addition to providing supported independent living. The organization has a small fleet of vans, with one stationed at each residence. It provides direct transportation services to its residents, as well as to others accessing its services throughout Dufferin County, directly from their homes to the CLD main building for day programming. CLD's clients have indicated a need to facilitate access to employment and leisure opportunities in Orangeville. Under a coordinated partnership model, a key objective would be to assess whether or not their existing vehicles could contribute to enhancing existing transportation services.

Dufferin Area Family Health Team

The Dufferin Area Family Health Team provides primary care, chronic disease management, and mental health services to patients throughout Dufferin County. It does not directly provide transportation services to patients. Patients and employees rely on other means of transportation, such as public transit, the Shelburne transporter, and Caledon Community Services. Patients must often leave Dufferin County to access services at larger facilities in Brampton, Caledon, and Toronto. As a result, one of the agency's primary transportation priorities is the increase in service and accessibility to regional transit.

Family Transition Place

Family Transition Place (FTP) is an organization that provides emergency shelter, counseling, housing, and legal services to women and their children who have experienced abuse and/or homelessness. The centre is located in Orangeville but provides services to residents across Dufferin County. Although it does not directly provide transportation services, FTP refers clients to public transit, taxis, the Ontario Early Years Centre van, the Dufferin County Community Support Services van, and the Shelburne Transporter. Depending on the circumstance, the centre also covers the cost of transportation for its clients. FTP would like to see increased transportation options throughout Dufferin County, in order to better connect with all those in need. Under a coordinate partnership model, a key objective would be to assess whether or not the FTP would be willing to contribute funding for the provision of services.

United Way Guelph Wellington Dufferin

United Way supports non-profit agencies in Guelph, Wellington and Dufferin Counties by funding community agency programs. Specifically, funding is provided to five agencies in Dufferin County that serve a vast array of clients often facing transportation barriers. Many of these programs require transportation support through/between rural areas. Funding is typically provided to clients to pay for transportation services (e.g. taxi or bus fares). While there are a number of programs being offered within Dufferin County, it can often be difficult for people to access these programs. Under a coordinate

partnership model, a key objective would be to assess opportunities that fund raising activities from the United Way could support the provision of transportation services.

Headwaters Health Care Centre

Headwaters Health Care Centre is an 87-bed acute and complex continuing care facility that provides health and other social services to people throughout Dufferin County. It is a medium-sized community hospital with a large integrated ambulatory care program. Patients often have difficulty accessing outpatient programs and primary care services because of transportation inaccessibility. As a result, preventative visits are often put off, sometimes resulting in worsening health conditions that require 911 to be dispatched. Headwaters Health Care Centre does not directly provide transportation services or funding, but sometimes refers its patients to organizations such as Dufferin County Community Services. The Centre would like to see a more coordinated and accessible transportation system that allows patients greater flexibility and reduces the strain on emergency services.

Canadian Tire Jump Start Program

The Canadian Tire Jumpstart program helps financially disadvantaged kids ranging in age from 4 to 18 to participate in organized sport and recreation by covering registration, equipment and/or transportation costs. While the program does not provide a transportation service, chapter member volunteers will work in partnership with other local non-profit organizations to identify kids with the greatest need in their community and cover the registration, equipment and/or transportation costs to help them participate in a sport or recreational activity of their choice.

Dufferin County Paramedic Service

Emergency transportation services are provided by the Dufferin County Paramedic Service to all residents of Dufferin County. Service is provided on an as-needed emergency basis, by picking up patients at any location and transporting them to the appropriate health care facility. The ambulances are dispatched from one of the three stations located in Orangeville, Shelburne, and Grand Valley.

The program is funded by the County, but passengers contribute to part of the cost of transportation, through differing fees that vary by user category. The Dufferin County Paramedic Service responded to 8,115 calls in 2013. Its 10 vehicles and 58 employees (35 full-time, 23 part-time) generally were sufficient to respond to requests for assistance.

Governments and Municipalities

Municipal governments, along with the Dufferin County government, have a vested interest in the development of a comprehensive transit strategy and network that serves their citizens. Increasing accessibility throughout Dufferin County would allow municipal and county services to be reached by all segments of the population. Stakeholders that responded to the survey include:

- Town of Shelburne;
- Town of Orangeville; and
- Township of Mulmur.

Of the municipalities surveyed, the Town of Shelburne in particular showed interest in providing service to connect to regional transit, through a potential partnership with GO Transit and/or Orangeville Transit. The Town is currently negotiating a pilot project that would implement a fixed route bus service between Shelburne and Orangeville. The service would be designed to connect to the existing GO Transit route to Brampton.

Summary

The on-line questionnaire and follow-up stakeholder workshop revealed a number of existing transportation services in Dufferin County and opportunities to improve service. These are assessed in Step 3 below.

STEP 3 Identify Service Demand and Gaps/Implementation Issues and Opportunities

The purpose of Step 3 is to expand on the data gathering completed in Step 2 to determine service demands and gaps as well as implementation issues and opportunities. This will help determine the type of coordination model that should be implemented or whether coordination is a feasible solution. In certain cases, the problem is a resource issue which is better solved through additional funding rather than coordination.

Service Demand and Gaps

A number of transportation service gaps were identified as part of the consultation process. These were prioritized by the consulting team based on interviews with stakeholders and through the survey results. This should be confirmed by the partnership through a more detailed review of travel patterns and the number of trips not accommodated.

1. **Capacity Issues:** Dufferin County Community Support Services is the main service provider outside of Orangeville Transit in the County for seniors and persons with disabilities. The demand for service is greater the available resources, which results in a number of trips not being accommodated. This is particularly true when vehicles are tied up all day on an inter-regional trip (e.g. to a hospital in Toronto).

2. **Trip Purpose:** The majority of trips provided are targeted at seniors and adults with disabilities. With limited capacity, medical trips (both internal and interregional) are often prioritized. Based on discussions, there is a strong demand for other types of trips that are not being accommodated. This includes:
    a. **Work Trips:** Employees living in Dufferin County that work outside of the County require inter-regional transportation. There are limited options to access the GO Bus for residents outside of Orangeville. Internal work trips are also limited (e.g. ability to access employment in Mansfield resort).
    b. **After School Trips:** Students that wish to participate in after school programs or attend part-time employment have limited options. Currently students living in Grand Valley go to school in Shelburne. They often don't have transportation options for after school programs or to attend part-time employment.
    c. **Social Trips:** Medical appointments are the number one priority for most community care agencies. Often social trips or everyday living trips cannot be accommodated due to the capacity issues identified above.
3. **Eligibility:** The largest provider of transportation service is focused on seniors and persons with disabilities. There are fewer options available for adults and students/children.

Implementation Issues

A number of implementation issues and opportunities were also identified as part of the consultation process. These are important to understand as they have a direct influence on the type of coordination model selected. These include:

1. **Limited Service Providers:** There are very few transportation providers to coordinate with in the County. The majority of service outside of Orangeville is delivered by Dufferin Community Support Services. Many other agencies that provide service and targeted to the service they provide, and their drivers also act as program coordinators. The true benefit of coordination is to enhance the cost effectiveness of service by working together. Since existing service providers are stretched, there is limited opportunity to enhance the cost effectiveness of service. An increase in resources would be required to realize the true benefits of coordination.
2. **Mandates/Funding Constraints:** Dufferin County Community Support Services is mandated to provide transportation services only to seniors and persons with disabilities. They receive three quarters of their funding from the local LHIN, which places constraints on how the funding is used. This reduces their ability to partner with other organizations and maximize the use of their vehicles (i.e. by allowing adults to share rides with seniors).
3. **Resources/Driver Availability:** There are not enough vehicles or drivers to meet the current demand. Volunteer drivers are used to provide non-medical trips and there are few paid drivers operating agency owned vehicles. Additional drivers/vehicles are needed in order to meet the current demand; however, funding is also an issue to pay for these additional resources.

Opportunities

1. **New Corridor Service:** The Town of Shelburne is exploring the implementation of a fixed route commuter service pilot program to connect commuters to the AM peak and PM peak GO Bus service in Orangeville. This is the first corridor service in Dufferin and provides the potential to test the market for other trip purposes during other periods of the day (e.g. a noon run). There may be an opportunity to add some mid-day service runs to facilitate other trips types (e.g. shopping, medical, school).
2. **New Resource:** Dufferin County Community Support Services recently purchased an eight passenger van. This van is now available for charter services and is currently being used by other organizations for client outings and day programming. There may be additional opportunities to fully utilize this vehicle.
3. **Underutilized Vehicles:** Community Living Dufferin provides every one of their residences with access to a van to help with resident transportation needs. The Ontario Early Years Centre also has a van that is used to provide their clients with access to services. The driver of the van is also the program coordinator, so the van is not regularly used throughout the day. There may be an opportunity to further investigate the utilization of these vehicles.
4. **Provincial Gas Tax Funding:** At this time, none of the existing municipalities with the exception of Orangeville have applied for and are receiving gas tax funds. Taking advantage of provincial gas tax funding will increase the potential to add additional resources into transportation network within Dufferin County.

STEP 4 Assess Different Levels of Coordination

The review of existing transportation services within Dufferin County revealed a desire among several organizations to improve rural transportation. Headwaters Community in Action currently has a listing of all transportation services on its website and has also produced a number of promotional material to hand out to the community. While this can help inform residents of their options, there are still limited existing transportation services within the County that residents can take advantage of. From a coordination perspective, there are also limited opportunities for coordination to improve the cost effectiveness of services.

There is also a desire to implement new services to meet the primary mobility gaps identified in the community. This requires an investment in new services through the identification of new funding sources. No existing transportation service in the County, with the exception of Orangeville, is benefitting from provincial gas tax funding. There is the opportunity to potentially access this funding at the County level when developing a coordination model.

The four coordination models were assessed to determine their applicability within Dufferin County. The lead partner for Models 1 through 3 is not known at this point and would need to be confirmed by the Transportation Coordination Working Group.

Model 1: Centralized Control

This model represents the highest degree of coordination and would involve a lead partner taking overall aspects of transportation on behalf of the partnership. Existing organizations that own vehicles such as the Early Years Centre would transfer ownership of their vehicles, operating resources and funding earmarked to transportation services to the lead partner.

This model would be applicable if the County had a desire to lead the coordinated transportation framework. There are very few transportation service providers within the County and the largest one (Dufferin County Community Support Services) already receives funding from the County. The benefit of this model for Dufferin is that it provides the highest degree of coordination as the entire fleet would be available and decisions would be made that maximize the efficiency of the trip. This model also allows the various organizations such as Early Years Centre to focus their staff on program delivery instead of transportation.

The disadvantages of this model are that the structure may jeopardize funding provided by the LHIN if there is a desire to expand the eligibility beyond seniors and persons with disabilities. This does not

meet the needs of the entire community. The structure will also do little to improve transportation unless additional resources are invested in transportation services.

Unless the County wishes to take the lead role in the transportation framework and the LHIN funding issue is addressed, this model is not recommended.

Model 2: Brokerage – Central Coordination

In this model, the lead organization is responsible for the planning, scheduling and dispatch of transportation services. Delivery of trips continues to be completed by each of the partner organizations.

The benefit of this model for Dufferin is that is maximizes the potential for coordination without requiring the County to expand their role in vehicle purchases and operations. The role of the lead partner, instead, would be as a coordinating body for all trips. It also allows the various different mandates of partner organizations to be maintained.

Within the County, there are not enough resources or organizations with similar mandates to effectively implement this coordination model. Orangeville Transit operates only with the limits of the town. Dufferin County Community Support Services only provides demand responsive services for seniors and persons with disabilities. The proposed Shelburne service to Orangeville is designed to meet the needs of GO Bus commuters only. There are too many differences and a diverse set of mandates that moving to this model right away may result in significant implementation challenges.

For these reasons, this model is not recommended.

Model 3: Brokerage – Confirmation-Based Coordination

This model is similar to Model 2. The big difference is that in this model the lead partner must confirm the booking of any coordinated trips with the partner organization providing the service before it is confirmed. The advantages and disadvantages are similar to the Model 2. The difference is the extra step required to book a trip and that the opportunity for coordination is less than in the Brokerage –Central Coordination Model.

This may be an appropriate model to explore for Dufferin County in the future as resources and services are expanded. A lead scheduler/dispatcher would have access to the entire network for vehicles and would be responsible for coordinating all trips between the different providers and assessing potential new service levels. This includes the ability to feed demand responsive services

into corridor services between Shelburne and Orangeville or to coordinate the use of various vehicles such as the Early Years van.

For these reasons, it is recommended that this model be carried over for further review once additional funding is found and the system is expanded.

Model 4: Voluntary Cooperation

This model is the first step toward greater coordination and there is already evidence of this occurring among different organizations within the County. Headwaters Communities in Action has already developed a database of existing services, created a website and has done some initial marketing to the community on the availability of transportation options.

This is a good first step in developing a coordinated model, but there are still other areas that a partnership could focus on.

The disadvantage of this model is that there is a little role for Dufferin County. The main advantage of Dufferin County being the lead is the potential to access provincial gas tax funds. This will only occur if the County is responsible for the partnership.

Adopting this model would help form the partnership and allow organizations to build trust amongst each other. It would also help create more awareness and allow organizations to share best practices. For these reasons, it is recommended that this model be carried over for further review.

STEP 5 Identify the Building Blocks of the Preferred Coordination Models

In Step 4, two of the four coordination models were considered for further review: Model 3: Brokerage Model – Confirmation Based and Model 4: Voluntary Cooperation. Model 1 (Central Coordination) is also a potential for consideration if it would not the move would not jeopardize existing funding that Dufferin County Community Support Services receives from the LHIN.

With these models in mind, each of the building blocks that make up a coordinated transportation framework will need to be assessed by the partnership working group. This includes service delivery, scheduling and dispatch, vehicle maintenance, etc. The application of each of these building blocks to the preferred Dufferin County model is documented below.

Service Planning

Under Model 4, coordination of service planning is not applicable and therefore requires no further discussion.

Under Model 3, coordination of service planning is optional and under Model 1 it is required. Given the limited number of transportation services currently operating within the County, coordinating service planning between the various local agencies would add little value. However, with an increase in resources, there are a few areas where coordination of service planning may improve the effectiveness of service delivery.

A partnership between Dufferin County Community Support Services and Caledon Community Services would potentially improve coordination for long-distance trips between each other's territory. Service planning decisions could be made that allow a Dufferin County Community Support Services vehicle delivering a passenger to Caledon Community Service's service area to:

1. Be available to Caledon for local trips while waiting for a client (this would reduce a client's waiting fee and create more capacity in the local area);
2. Deliver a Caledon client back to Dufferin instead of waiting for the return trip of their own client (in this case, a Caledon vehicle would be scheduled to deliver the Dufferin client back to their home);
3. Deliver the client to an agreed transfer point where it would meet with a Caledon vehicle who would complete the trip (this would be done if it would increase the vehicle occupancy or if there was demand for the Dufferin vehicle within Dufferin County).

With the above examples, the reverse would also apply if a Caledon Community Services vehicle delivered a client to Dufferin County. Suitable service planning agreements would need to be made. This would only work if scheduling and dispatching were also coordinated and would benefit from a scheduling and dispatch software program being in place. A more detailed assessment of travel demand between the two regions would need to be conducted.

Other service planning coordination opportunities include between Dufferin County Community Support services and the Town of Shelburne's proposed commuter shuttle service between Shelburne and Orangeville. This would occur if Shelburne decided to expand the number of runs beyond the AM and PM peak period. If this were the case, the two organizations would work together to determine potential demand from the existing service provided by Dufferin County Community Support Services and identify potential transfer points in Shelburne where Dufferin County Community Support Service could feed some of its clients to. This is discussed at length in **Step 6** below.

Finally, coordinated service planning could occur between several agencies to create purposed specific trips for the spare Dufferin Community Support Services vehicles. This is also discussed at length in **Step 6** below.

Marketing / Awareness

It is recommended that a central brand be developed for the partnership. Based on initial review, the beginning stages of this have already taken place. Headwaters Communities in Action has created a database of existing transportation services within the County. They have also started to market this central resource by creating and distributing a postcard that illustrates all of the existing transportation services available to County residents. The partnership should continue to expand this initiative.

It is recommended that the working group further investigate the opportunity to provide a central phone number staffed by a member of the partnership and develop a unique webpage with links to each of the participant's webpages.

The central webpage and phone number would be more easily identifiable to persons searching for a transportation service and would provide members of the community with one contact number and website where they can solicit information on existing services. Residents can then be directed to the most appropriate service.

To maintain a local connection, the support provided by each partner in the organization should be identified in marketing and communications material.

Some initial funding would need to be put in place to develop a brand and communication strategy and a cost sharing agreement may need to established to pay for the website and the salary of a staff member answering phones. It is anticipated that this would be part of the function of an existing transportation coordinator of an existing agency. Outside marketing and branding expertise may be sought to help develop a central brand.

Customer Service / Scheduling and Dispatch

Since there are a limited number of organizations that provide transportation services at this time, it is recommended that the customer service, intake processes and scheduling and dispatching of trips continue to occur at each individual organization. The existing service providers have very different mandates as well as eligibility criteria.

In the future, if the partnership moves towards implementing Model 3 or 1, the working group may wish to investigate options for a centralized office that coordinates the scheduling and dispatching of all trips. This would be the responsibility of the lead partner. In choosing a lead partner, it is important to have someone with experience in operating transportation services to take a lead role in this. Currently, the

most experienced provider would be Dufferin County Community Support Services, however, there would need to be some assurance that this role would not jeopardize LHIN funding, particularly if the mandate were expanded to include transportation for adults and youth. If this were to occur, a central office could be established as the main interface point for customers requesting trips or getting information about existing services. The group would need to establish a central phone number for residents to call. A scheduling and dispatch software program should be sought. There are simplified versions of this type of software available on the market that cost as little as $500 monthly with no upfront purchase fee that can be acquired. While not as robust as a number of the more sophisticated scheduling software programs available, this would be appropriate given the number of vehicles and annual passenger trips currently serviced within the County.

Eligibility Criteria and Intake Process

Standardizing eligibility is not a significant issue within Dufferin County since there are few transportation providers that currently provide service. The two providers that would benefit from a standard eligibility criteria document are Dufferin County Community Support Services and Caledon Community Services if an integrated service planning approach were developed. This would ease the ability to coordinate trips. Since both organizations reside in a different county/region, there is little value in coordinating the intake process.

Policies and Procedures / Passenger Fares

It is recommended that the working group share and explore best practices on policies and procedures. There may be opportunities to have common policies and procedures for all participating organizations. Where possible the working group should work together to develop common policies and procedures.

The working group should also review passenger fares for each organization. The ability to standardize passenger fares and kilometre rates would help enhance the ease in which coordination takes place.

Vehicle Purchase, Vehicle Maintenance, Driver Training

Given the limited number of existing resources within the County, there is no real benefit to coordinating vehicle purchases. However, vehicle specifications should be reviewed and agreed to by the partnership to ensure all future vehicles are consistent in their ability to accommodate passengers with mobility devices.

There is some value in developing a standard driver training program that could be used for paid drivers and volunteers. This would ensure that all drivers have the same safety and customer service training.

Volunteer Recruitment and Training

It is recommended that the working group share their best practices with regards to volunteer training. There may be an opportunity to coordinate training sessions together to avoid duplication of efforts.

STEP 6 Select a Preferred Coordination Model

Within Dufferin County, it is recommended that Model 4 (Voluntary Cooperation) be explored in the short term with the goal of moving towards either Model 3 (Brokerage – Confirmation Based) or even Model 1 (Central Coordination) in the future once additional funding has been secured and services have been expanded. Recommended participants in the partnership include the County and local municipalities, Dufferin County Community Support Services, Caledon Community Services, other social service agencies and local employers. Private sector bus operators and taxis may be used to provide service, but would not form part of the partnership.

Based on the above review, the following opportunities should be explored by the working group to improve transportation services in Dufferin County:

1. **Pursue Sustainable Funding to Grow:** Given the limited number of existing resources, it is essential that the working group identify additional funding sources to be able to expand transportation services. It is recommended that the group approach the County and/or any of the local municipalities to discuss the potential to access Provincial Gas Tax funding. The larger the municipality, the higher the potential gas tax contribution would be as 30 percent of the funding formula is the population of the municipality(s) providing the service. Since Orangeville already receives gas tax funding for Orangeville Transit, its population and ridership would not be counted when calculating Dufferin County's potential gas tax allocation.

   To receive gas tax funding, the County or one of the local municipalities would need to formally support and contribute financially to public transportation services. The amount contributed would in part influence how much they receive. More than one of the local municipalities can also participate in the transportation partnership, as long as one municipality is identified as the lead. The funds received would flow through the lead municipality and be directed at expanding existing services. Since Orangeville already receives gas tax funding, they could also act as the lead, if other municipalities or the County signed an agreement with the Town to be part of the provincial gas tax program.

   In addition to gas tax funding, other sources of funding should be sought. A small transportation levy per household and business (e.g. $10 to $15 annually) would significantly increase the level of investment to expand transportation services. This has been successfully done in other municipalities, including the County of North Hastings to support the TROUT service.

   The LHIN should also be approached to ensure that Dufferin County Community Support Services funding is not jeopardized if it begins to accept other types of riders (e.g. adults and youth) as part of the coordinated partnership. Clear metrics would need to be established to

ensure that the portion of funding provided by the LHIN continues to serve the needs of seniors and persons with disabilities, even under a coordinated framework.

2. **Identify "Purpose Specific" Opportunities for New Van:** Based on the service gaps and needs identified in Step 3, the working group should identify some purpose specific opportunities to address mobility gaps and better use the eight passenger van that has been purchased by Dufferin County Community Support Services. These opportunities will assist in managing the demand for "non-priority" and discretionary trip requests (e.g. shopping, recreation) or subscription based trips that may occur on a regularly scheduled weekly, bi-weekly or monthly basis (e.g. adult day centre programs). An example of the type of service that could be provided is a Tuesday shuttle to a grocery store in Shelburne and a Wednesday shuttle to the Orangeville Mall.[15]

   When designing specific services, the working group should also investigate opportunities to secure funding from retailers and facilities. These groups may be interested in contributing to the service if it draws more customers to their stores. This arrangement is very common for a number of public transit systems that direct service to retailers (in many cases, the retailer will pay 100 percent of the operating cost of the service). Advertising opportunities on the van can also be included in this package to help secure additional funding.

   While Dufferin Community Support Services has a specific mandate to service only seniors and persons with disabilities, it is recommended that the use of this van be open to all members of the community.

   While the primary focus can be on seniors and persons with disabilities, opening up the service to other members of the community will help ensure it remains financially sustainable. The better utilized the vehicle, the greater the fare contribution is to pay for the operating cost of the vehicle. This may lead to more opportunities to charter the vehicle for various different types of trips that may not be financially feasible without opening up the eligibility criteria to all members of the community.

   As an example, if a Tuesday afternoon grocery trip from Mulmur to Shelburne only attracted 2-3 eligible Dufferin County Community Support Services clients, it may be cut from service as this fixed charter trip would not carry enough passengers to justify the cost. Without this service, these 2-3 passenger would likely attempt to book a demand responsive service and travel individually to the grocery store to meet their needs. However, if the eligibility were opened to

[15] Potential fare parity issues under the AODA legislation should be reviewed before proceeding with this option.

adults and youth and the bus were able to accommodate a total of 6-8 passengers each paying a passenger fare, the service would be considered financially sustainable.

The benefit to Dufferin County Community Support Services is that it would:

- accommodate the discretionary trips of its 2-3 eligible passengers;
- attract potential funding from the grocery store by having a higher passenger volume; and
- save the use of their demand responsive service for high-priority medical trips, which are more difficult to coordinate with other passengers.

For this service offering to be effective, the working group would need to identify the hourly cost of a charter service, establish a passenger fare and the minimum number of passengers required to make the service cost effective. Once this is complete, a more detailed review of the gap analysis (Task 3) would need to be completed to determine potential charter runs that could meet the demand for service for all residents (seniors, adults, youth). This can be done by reviewing existing travel demand and determining patterns between origins and key destinations. The route can be designed as a flex service, where passengers are picked up and dropped off at their homes if they call in 24 hours in advance for service.

Businesses that are targeted for charters would be approached for potential funding. Marketing of the service will be important and transportation coordinators of each existing agency should inform clients of the service options.

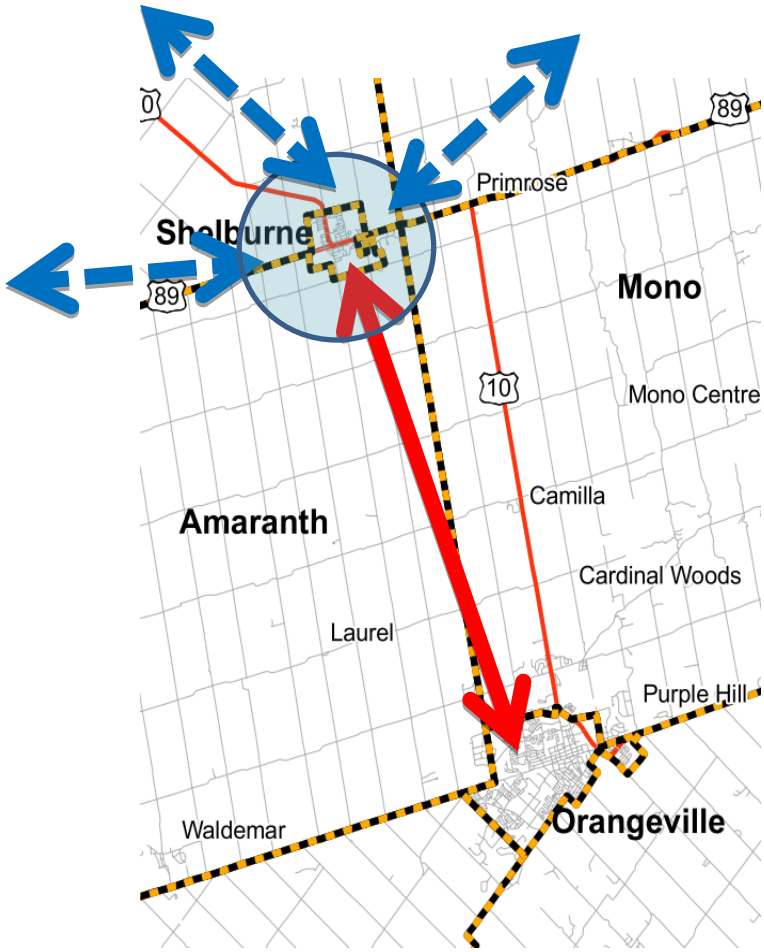
The LHIN would also need to be approached about the concept of using this vehicle to accommodate other passengers. A key message that would need to be conveyed is that:

- seniors would continue to be the focus when devising charter services for non-discretionary trips and opening up the eligibility would help ensure the service is financially sustainable; and
- the service would reduce the demand on the demand responsive service, allowing it to accommodate more priority medical trips (since a number of discretionary trips such as trips to the grocery store could now be more effectively accommodated on the charter service).

3. **Identify Integration Opportunities with Shelburne Commuter Service:** Once the Town of Shelburne has implemented its fixed route weekday peak period service to/from the Orangeville GO Bus stop, the working group should investigate opportunities to accommodate additional passenger demand within and outside of Shelburne to this service and/or expand on this service by identifying some potential runs outside of the AM and PM peak periods. At this time, the

partnership will have been well established and may be looking to transition to Model 3 to increase the level of coordination within the County.

Figure 6 - Potential Corridor Service between Shelburne and Orangeville



The distance between Shelburne and Orangeville is approximately 26 km. At a rate of $0.41 cents per kilometre, the passenger fare for this trip if delivered by Dufferin County Community Support Services is approximately $10.50 per direction. The Shelburne service will cost approximately $9.25 for a round trip ($4.63 per direction) and will require approximately 12 passengers to break even.

The concept of coordination would be to feed as many demand responsive passengers into this fixed route service instead of providing a parallel demand responsive service during the same

operating periods[16]. This would also require coordination with Orangeville Transit to ensure residents could complete their trip while in Orangeville.

While it is expected that few seniors would use the AM peak period service, there may additional opportunities to coordinate with the return PM peak trips back to Shelburne. In this scenario, it would save Dufferin County Community Support Services from making the 26 km trip to Orangeville to pick up their passenger and make another 26 km trip back to Shelburne. Instead, the Shelburne fixed route service could be used to provide the trip to Shelburne with a Dufferin County Community Support Services van waiting at an agreed to transfer point in Shelburne to complete the client's trip.

This is known as a family of services approach which is practiced by a number of specialized transit service providers such as York Region Mobility Plus. An assessment of the ability of existing clients to transfer between vehicles would need to be conducted through a Travel Training program. Only client's that passed the travel training program would be eligible for the family of services approach. Metrolinx recently adopted an "On Our Way" Travel Training Program which includes the customizable template materials, which are being made available to any agency to use in developing their own travel training program. The program includes a checklist for transit providers to assess the level of accessibility of their services, a travel training manual to be used to train staff from community agencies (and other potential partners) to deliver customized programs to suit their clients' needs, an implementation toolkit and a Traveller's Handbook for customers who participate in the travel training program. The program can be used not only to train seniors and persons with disabilities on how to transfer between Dufferin County Community Support Services and Shelburne's service, but also for residents of Shelburne and Orangeville that want to travel between the two municipalities or to transfer onto the GO Bus service. For this to be successful, part of the role of partner agencies brought on board may be to bring in volunteers to assist with travel training of existing clients.

The benefit to Dufferin County Community Support Services is that is reduces the demand for the more costly demand responsive service for passenger's travelling between Shelburne and Orangeville. The benefit to clients is that it creates more travel options and increases independence of travel. The benefit to Shelburne and Orangeville is that it increases vehicle occupancy on already existing services (thus making them more financially sustainable).

This would be a significant investment in time to train clients and should only be done with the view that the number of runs between Shelburne and Orangeville would eventually expand to

[16] Potential fare parity issues under the AODA legislation should be reviewed before proceeding with this option.

other periods of the day when seniors are more likely to travel. This would require the working group to assess existing travel patterns and potentially conduct a travel demand survey to assess other periods of the day that warrant the addition of a new run.

Other potential times include a run that connects to the 11:10 GO Bus arrival at the Orangeville Mall or the 12:30pm GO Bus Departure from the Orangeville Mall. These runs also benefit GO Bus commuters as it provides them with flexibility if they need to travel outside of the peak period routes (e.g. there is an emergency at home and they need to take the earlier bus home).

In the reverse direction, the service could potentially be used as a transfer opportunity for other future services within the county. As an example, the lack of transportation services for seasonal workers in the Mansfield area was identified during consultation sessions as a priority that should be addressed. A reverse direction Shelburne service would allow an employer shuttle to begin at a more central point of the County (in Shelburne instead of Orangeville).

These types of coordination opportunities will need to be discussed with the working group to determine the potential of the Shelburne to Orangeville corridor service to be cost-effectively expanded to better service the broader transportation needs of the community.

4. **Identify Opportunities to Use Underutilized Vehicles:** Once the partnership has secured additional funding, there is an opportunity to better utilize existing underutilized resources within the County such as the Early Years Centre vehicle and the Community Living Dufferin vans. Both organizations have vehicles that are used to transport their clients to their respective programs, however, the driver of the vehicle also serves as the program coordinator.

   Making better use of these vehicles will increase the availability of service to County residents under a coordinated partnership and should be explored by the coordination working group.

   To do this, the opportunity to hire a part-time driver to operate the Early Years Centre or the Community Living Dufferin vehicles should be explored. In doing this, an agreement would need to be in place that trips for day programs would continue to take priority and other clients would only be serviced if they were not being used by both respective facilities.

   For this arrangement to work, a centralized scheduling and dispatch office would need to be in place to coordinate trips between both facilities and general passenger requests. A cost sharing agreement would also need to be in place to pay for the driver, recognizing the both facilities would now have full access to their program coordinators that previously operated the vehicles (e.g. the Early Years Centre driver would now be devoted to what they do best: coordinate programs for young families). The agreement would take into account the use of the vehicle, including vehicle maintenance and life-cycle costs/replacement. The economic rationale for this model would depend on the percent of the time the vehicle could be used for general purpose

trips by the partnership versus how much the vehicle is dedicated to clients of the two day programs. The greater the availability of the vehicles to the partnership, the more it makes sense to hire a dedicated driver and the costs to be shared between members of the partnership.

Next Steps

For the coordination model to be successful, leadership is required. It is suggested that a working group of existing service providers and key stakeholders be formed to further develop immediate opportunities (within their span of control) in the areas outlined above.

It is recognized that there are gaps and travel markets not being addressed by the existing services and that the introduction of a new fixed route service from the Town of Shelburne to the Town of Orangeville may help address these deficiencies.

UNITED COUNTIES OF LEEDS AND GRENVILLE

OHCC · CCSO
Ontario Healthy Communities Coalition
Coalition des communautés en santé de l'Ontario

Ontario Trillium Foundation
Fondation Trillium de l'Ontario
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7.3 United Counties of Leeds and Grenville

Background / Context

The United Counties of Leeds and Grenville (Leeds and Grenville) are located in eastern Ontario along the St. Lawrence River, between the cities of Kingston and Ottawa. Leeds and Grenville are bordered by the Frontenac County to the west, by Lanark County and the City of Ottawa to the north, by the United Counties of Stormont, Dundas, and Glengarry to the east, and by New York State to the south. The geographic area covers 3,384 square kilometres.

The local government consists of 10 municipalities, which are:

- Township of Athens;
- Township of Augusta;
- Township of Edwardsburgh/Cardinal;
- Township of Elizabethtown-Kitley;
- Township of Front of Yonge;
- Township of Leeds & the Thousand Islands;
- Municipality of North Grenville;
- Township of Rideau Lakes;
- Village of Merrickville-Wolford; and
- Village of Westport.

The City of Brockville and Towns of Gananoque and Prescott are separated from the County administration, but remain part of the County for census purposes. These are referred to as Partner Municipalities. **Figure 7** displays a map of the County. The largest urban area is the City of Brockville, population 21,870 (2011 census).

Figure 7 - United Counties of Leeds & Grenville

(Source: United Counties of Leeds & Grenville)

Population

Each municipality has its own unique characteristics, including demographics, employment base and transportation needs. The largest municipality within Leeds and Grenville, by population, is North Grenville followed by Rideau Lakes. **Table 12** provides a summary of the size, population and population density of each municipality within the United Counties.

Table 12 - Population Density Summary

Municipality	Land (sq. km)	2011 Population	Population Density (pop/sq. km)
Athens	127.8	3,195	25.0
Augusta	314.7	7,615	24.2
Edwardsburgh/Cardinal	312.3	7,130	22.8
Elizabethtown-Kitley	557.8	9,965	17.9
Front of Yonge	127.9	2,745	21.5
Leeds & the Thousand Islands	612.5	9,505	15.5
North Grenville	352.1	15,455	43.9
Rideau Lakes	729.1	10,460	14.3
Merrickville-Wolford	214.5	2,920	13.6
Westport	1.7	645	379.4
United Counties of Leeds and Grenville	**3,350.4**	**69,635**	**20.8**
Brockville	20.9	23,100	1105.3
Gananoque	7.0	4,369	624.1
Prescott	5.0	4,284	856.8
Leeds and Grenville with Partner Municipalities	**3,383.3**	**101,388**	**30.0**

(Source: Stats Can 2011 Community Profiles)

The majority of Leeds and Grenville are rural agricultural and forested land with urban areas scattered throughout. In 2011, the population was 69,635. This represents a 0.1 percent increase from the 2006 census.

Growth is anticipated to occur at a more rapid rate than in the past, but is still considered to be modest. The population is forecasted to reach 74,620 by 2031. This represents a seven percent growth rate between 2011 and 2031. The highest growth will occur in North Grenville followed by Edwardsburgh/Cardinal. The growth in North Grenville is likely focused on Kemptville.

The three Partner Municipalities are also anticipated to grow at a similar rate, with the majority of growth occurring in Brockville.

This is illustrated in **Table 13** below.

The demographic profile of the existing population is illustrated in **Figure 8.** The County has an aging population, where 20 percent of the population is over the age of 65. This is well above the provincial average of 14.6 percent.

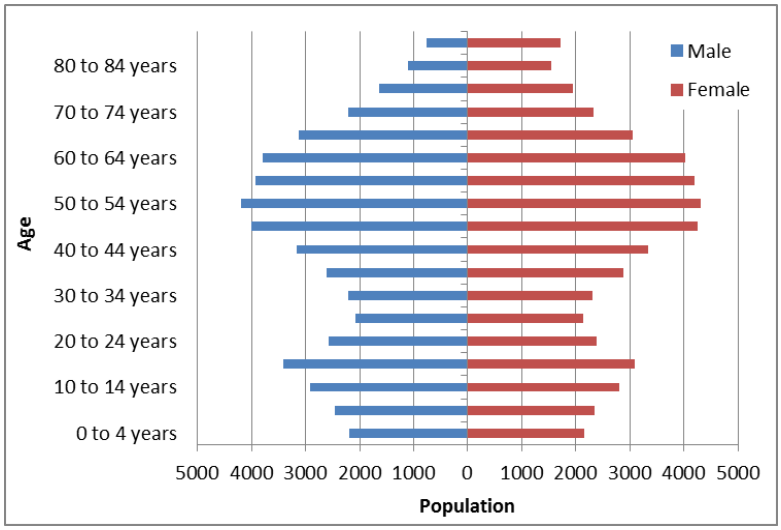
Table 13 - Forecasted Population Growth in Leeds and Grenville

Municipality	Population			
	2011	2031	Change	% Growth
Athens	3,195	3,260	65	2%
Augusta	7,615	7,790	175	2.3%
Edwardsburgh/Cardinal	7,130	7,650	520	7.3%
Elizabethtown-Kitley	9,965	9,970	5	0%
Front of Yonge	2,745	2,830	85	3.1%
Leeds & the Thousand Islands	9,505	9,910	405	4.3%
North Grenville	15,455	18,350	2,895	18.7%
Rideau Lakes	10,460	11,090	630	6%
Merrickville-Wolford	2,920	3,060	140	4.8%
Westport	645	710	65	10%
United Counties of Leeds and Grenville	**69,635**	**74,620**	**4,985**	**7.2%**
Brockville	23,100	24,600	1,500	6.5%
Gananoque	4,369	4,815	446	10.2%
Prescott*	4,284	4,719*	435	10%
Leeds and Grenville with Partner Municipalities**	**101,388**	**108,754**	**7,366**	**7.3%**

** Population forecasts only available for the year 2023*

*** Partner Municipalities are Brockville, Gananoque and Prescott*

Figure 8 - Leeds and Grenville Population Pyramid



(Source: Stats Can 2011 Community Profiles)

Employment

The majority of employment is located within the City of Brockville. Within the United Counties, the majority of employment opportunities are located in North Grenville followed by Elizabethtown-Kitley.

Employment within the United Counties has been declining over the past five years. This decline is expected to stabilize to 2031, with some minor employment loses projected in Elizabethtown-Kitley (4.7 percent). With the population of the United Counties growing by 7.4 percent, this will mean less local employment opportunities for residents.

Employment is Brockville, will continue to grow by approximately 9.4 percent. **Table 14** illustrates the existing and forecasted employment within the United Counties and Partner Municipalities.

Table 14 - Forecasted Employment Growth in Leeds and Grenville

Municipality	Employment			
	2011	2031	Change	% Growth
Athens	950	950	0	0%
Augusta	1,040	1,040	0	0%
Edwardsburgh/Cardinal	1,430	1,400	-30	-2.1%
Elizabethtown-Kitley	2,560	2,440	-120	-4.7%
Front of Yonge	410	410	0	0%
Leeds & the Thousand Islands	1,850	1,830	-20	-1.1%
North Grenville	5,240	5,220	-20	-0.4%
Rideau Lakes	1,420	1,430	10	0.7%
Merrickville-Wolford	890	900	10	1.1%
Westport	520	530	10	1.9%
United Counties of Leeds and Grenville	**16,310**	**16,150**	**-160**	**-0.98%**
Brockville	14,190	15,520	1,330	9.4%
Gananoque*	N/A	N/A	N/A	N/A
Prescott*	N/A	N/A	N/A	N/A
Leeds and Grenville with Partner Municipalities**	**30,500**	**31,670**	**1,170**	**3.8%**

** Existing and Forecasted Employment not available*

*** Partner Municipalities are Brockville, Gananoque and Prescott*

Leeds and Grenville has experienced many changes over the past few decades. Many of the heavy industries have given way to light industrial businesses. The County is home to small, national and international companies and firms, including many in logistics and transportation, forestry, warehousing, pharmaceuticals and food processing, manufacturing and construction, accommodation and food services, management, agriculture, and health and trade.

The major employers in the County and Partner Municipalities are identified in **Table 15 and 16** respectively.

Table 15 - Major Employers in Leeds and Grenville

Employer	Sector	Total Employees 2014	Municipality
Burnbrae Frams Ltd.	Employment	325	Elizabethtown-Kitley
Ingredion Canada Incorporated (formerly Casco Inc.)	Employment	215	Edwardsburgh/Cardinal
Prysmian Group	Employment	200	Edwardsburgh/Cardinal
Kemptville Truck Centre Limited	Population – Related	200	North Grenville
Scalar Decisions Inc.	Employment	120	Leeds and the Thousand Islands
Canada Border Service Agency Lansdowne	Public Admin / Health / Institutional	120	Leeds and the Thousand Islands
G. Tackaberry & Sons Construction Co. Ltd.	Employment	120	Athens
eSolutionsGroup Ltd.	Employment	110	Front of Younge
730 Truck Stop Inc.	Employment	100	Edwardsburg/Caradinal
Invista (Canada) Company	Employment	100	Augusta
University of Gelph, Kemptville Campus	Public Admin / Health / Institutional	100	North Grenville
Valley Bus Lines	Employment	100	North Grenville
ORMG	Employment	85	North Grenville

Source: Draft Employment Lands Supply Analysis, MMM Group, June 2014

Table 16 - Major Employers in the Partner Municipalities

Employer	Sector	Total Employees 2014	Municipality
Upper Canada District School Board	Public Admin / Health / Institutional	1,397	Brockville
Brockville General Hospital (BGH)	Public Admin / Health / Institutional	850	Brockville
Procter & Gamble Inc. (P&G)	Employment	557	Brockville
Covidien (Ludlow Technical Products Canada Ltd.)	Employment	400	Gananoque
United Counties of Leeds and Grenville	Public Admin / Health / Institutional	425	Brockville
OLG Casino Thousand Islands	Population-related	420	Gananoque
Trillium Health Care Products Inc.	Employment	328	Brockville
3M Canada Company	Employment	300	Brockville
Walmart Brockville	Population-related	290	Brockville
Transcom	Employment	276	Brockville
City of Brockville	Public Admin / Health / Institutional	275	Brockville
Kriska Transportation	Employment	260	Prescott
St. Lawrence Lodge	Public Admin / Health / Institutional	280	Brockville
Canarm Ltd.	Employment	170	Brockville

Source: Draft Employment Lands Supply Analysis, MMM Group, June 2014

The primary employers in the area are located within the partner municipality of Brockville. The majority are in the public administration, health and institutional sectors.

The two major employers in Gananoque are the OLG Casino Thousand Islands and Covidien. The OLG Casino in Gananoque has 480 slots and 22 tables and employs 425 full and part-time employees from the region. During peak season, the Casino also generates a number of spin off employment opportunities in the tourism and hospitality industry. For a number of businesses in the Gananoque area, transportation can be a barrier to attract employment, particularly part-time or seasonal employment.

In Leeds and Grenville, the two largest employers are in the food manufacturing and processing sectors.

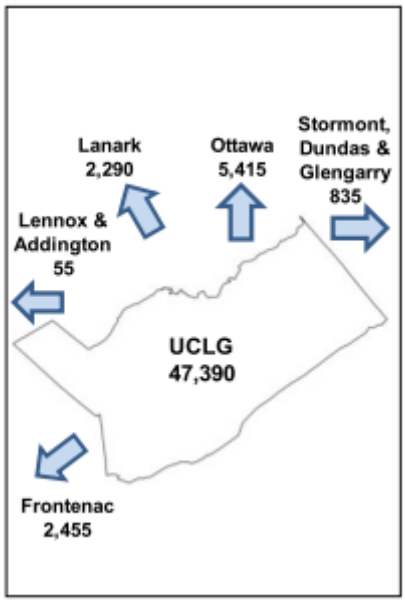
Tourism also plays an important role within the County, given its unique location near the St. Lawrence River and the 1000 Islands region, the historic Rideau Canal and the Frontenac Arch Biosphere.

Travel Patterns

Resident travel patterns were also assessed to better understand the potential for a coordinated transportation framework. As illustrated in **Figure 9**, the travel patterns of Leeds and Grenville residents are fairly dispersed, with the majority working within the County and Partner Municipalities, but also a large number working in Ottawa, Lanark and Frontenac.

Figure 10 outlines the primary destination from each municipality in Leeds and Grenville in more detail. Brockville, Ottawa and Smith Falls are the primary destinations of residents, depending on the municipality they reside in. This is followed by Kingston, Frontenac and other municipalities in Leeds and Grenville.

Figure 9 - United Counties of Leeds and Grenville Commuting Patterns (2011)



Source: Leeds Grenville Official Plan Phase Two Growth and Settlement Analysis: Member Municipal Growth Distribution, Draft – June 4, 2014 – Hemson Consulting

Figure 10 - Top Three Destinations of Leeds and Grenville Commuters (2006 and 2011)

Table 17
Top 3 Destinations of Leed Grenville Commuters, 2006 & 2011

Municipality	2006		
	1st	2nd	3rd
Athens	Brockville	Elizabethtown-Kitley	Smiths Falls
Augusta	Brockville	Prescott	Elizabethtown-Kitley
Edwardsburgh/Cardinal	Prescott	Ottawa	Brockville
Elizabethtown-Kitley	Brockville	Smiths Falls	Ottawa
Front of Yonge	Brockville	Elizabethtown-Kitley	Gananoque
Leeds and the Thousand Islands	Gananoque	Kingston	Brockville
Merrickville/Wolford	Smiths Falls	Ottawa	North Grenville
North Grenville	Brockville	Merrickville/Wolford	Gatineau
Rideau Lakes	Smiths Falls	Westport	Perth
Westport	Perth	Kingston	Smiths Falls
UCLG Census Division*	Ottawa	Lanark	Frontenac
Municipality	2011		
	1st	2nd	3rd
Athens	Brockville	Elizabethtown-Kitley	Smiths Falls
Augusta	Brockville	Prescott	Elizabethtown-Kitley
Edwardsburgh/Cardinal	Brockville	Ottawa	Prescott
Elizabethtown-Kitley	Smiths Falls	Ottawa	Athens
Front of Yonge	Brockville	Kingston	Ganaoque
Leeds and the Thousand Islands	n/a	n/a	n/a
Merrickville/Wolford	Ottawa	Smiths Falls	North Grenville
North Grenville	Ottawa	Brockville	North Dundas
Rideau Lakes	Smiths Falls	Kingston	Perth
Westport**	Leeds & Grenville	Frontenac	
UCLG Census Division*	Ottawa	Frontenac	Lanark

*includes Brockville, Gananoque and Prescott

**No data available below the Census Division level.

Source: Leeds Grenville Official Plan Phase Two Growth and Settlement Analysis: Member Municipal Growth Distribution, Draft – June 4, 2014 – Hemson Consulting

STEP 1 Identify Two or More Organizations that Share a Common Goal

The very first step in the process is to identify two or more parties that are willing to work together to explore the potential of a coordinated framework.

During the Leeds and Grenville stakeholder workshop, a number of organizations expressed an interest to be part of the solution and improve transportation services in the United Counties. They also expressed a desire to work together to assess whether a coordinated framework is right for them. Some of these organizations include:

1. **Every Kid in Our Communities** – While this community collaboration focuses on the needs of children and youth within Leeds and Grenville, there is also a strong interest in improving the overall mobility within the community. The past experience gained through their leadership role in the coordinated transportation pilot project will be valuable in any new discussions to improve transportation coordination with the county.
2. **United Counties of Leeds and Grenville and/or Local Municipalities** – Support from the County and each local municipality would allow the partnership to gain access to provincial gas tax funding and expand the resources available to provide community transportation.
3. **Existing Transportation Providers** – There was significant interest from a number of organizations that currently provide transportation services, including Wubs Transit, Kemptville Transportation Services, North Grenville Accessible Transportation and Student Transportation of Eastern Ontario. Each of these should be approached as part of the partnership.
4. **Local Agencies** – There were several local agencies in attendance at the workshop that do not provide transportation but have an interest enhancing mobility for their clients. Opportunities to contribute to the partnership need to be assessed as part of this initial task.

Confirmation of this group would need to take place through a series of working sessions and a commitment to work together documented through a memorandum of understanding. A lead organization would also need to be identified as a next step. Given its previous experience in pursuing a coordinated transportation framework, Every Kid in Our Communities would be a logical choice as a lead agency.

STEP 2 Inventory Existing Transportation Services and Key Stakeholders

The next step in the process is to better understand transportation services that already exist as well as the various stakeholders and their ability to contribute to the transportation solution.

While the United Counties of Leeds and Grenville do not provide a county-wide public transit service, there is a mix of municipal and other transportation services that operate within the community.

The inventory of existing transportation service providers was conducted to identify the extent of service currently being provided within the United Counties of Leeds and Grenville. **Table 17** provides a brief summary of existing services as identified through background research and the online survey conducted as part of this study region assessment. As identified below, there are limited subsidized transportation options within the United Counties of Leeds and Grenville.

It is important to note that the results presented below may be incomplete as not all organizations participated in the online survey. Where survey results were not obtained, a basic description of the service is provided.

Table 17 - Existing Transportation Providers in the United Counties of Leeds and Grenville

Organization	Type
Brockville Transit	**Municipal Transit**
VIA Rail	**Inter-Regional Transit**
Coach Canada	
Greyhound	
Canadian Mental Health Association Leeds Grenville	**Community Agency**
Community and Primary Health Care	
Westport Lions Club	
Kemptville Transportation Services	**Private Service Provider**
North Grenville Accessible Transportation	
Student Transportation of Eastern Ontario	
Wubs Transit	

Brockville Transit

Brockville Transit provides service throughout the City of Brockville along three fixed routes that serve designated stops. All routes connect at a downtown terminal and provide service to serveral residential, commercial and employment areas within the City. Service is provided at hourly intervals between 6:45am to 6:15pm on weekdays and between 8:45am to 6:15pm on Saturdays. Service is not provided Sundays and statutory holidays. A six-month pilot project was launched on July 1, 2014 that will see hours of service extended to 11:00pm on weekdays for one of the three bus routes.

The base cash fare for the service is $2.25, with children under five years of age riding free. Ten-ride passes and unlimited monthly passes are also offered, and provide bulk discounts to users.

KEY CHARACTERISTICS

Organization Type: Municipal

Operating Model: Fixed Route

Annual Ridership: 102,764 (conventional, 2013); 11,498 (specialized transit, 2013)

Vehicles Owned: 4 25-passenger accessible buses (conventional) and 2 accessible specialized transit vehicles

Eligibility: Conventional - open to all residents; Specialized transit – open to residents with disabilities

Geographic Focus: City of Brockville

The conventional service had an annual ridership of 102,764 passengers, representing a decline of 7.4 percent as compared with 2012.

The City also operates a parallel demand responsive specialized transit service for persons with disabilities in the urban area of Brockville. The specialized service has an annual ridership of 11,498 in 2013, representing a decline of 8.8 percent as compared with 2012.

Funding sources include municipal subsidies (76 percent of costs); passenger fares (21 percent); contributions from senior's facilities (2 percent); and advertising revenue (1 percent).

Canadian Mental Health Association Leeds Grenville

The Canadian Mental Health Association Leeds Grenville is a community agency that provides health and other social services to persons affected by mental illnesses. It operates demand responsive transportation services for people with mental health issues within the United Counties of Leeds and Grenville. The services are available to anybody accessing services at any of the partner organizations within the Counties. Their fleet includes two non-accessible vans, one of which is made directly available to partner agencies to use.

KEY CHARACTERISTICS

Organization Type: Agency

Operating Model: Demand Responsive

Annual Ridership: 2,000 (volunteers trips)

Vehicles Owned: 2 non-accessible minivans

Eligibility: Residents of Leeds and Grenville affected by mental health issues who are accessing services in the community

Geographic Focus: Leeds and Grenville

Approximately 2,000 trips are made annually with most services occurring Monday to Friday with the primary volunteer-driven van. The second van is lent out to partner agencies for up to seven hours at a time, if scheduled in advanced. Eligible residents can also use the van to access support services within the community, in addition to social events, recreation, and shopping. Trips can be taken both within Leeds and Grenville and to key inter-regional destinations such as Kingston and Ottawa. Passengers are not required to pay a standard fee for trips, but donations are accepted. The majority of the funding for the transportation services comes from the Local Health Integration Network.

North Grenville Accessible Transportation

North Grenville Accessible Transportation Transit is a specialized taxi-equivalent transit service providing services to North Grenville residents that require accessible transportation. It operates demand responsive transportation that transports passengers with disabilities and their attendants (if required) door-to-door. Their fleet is comprised of two accessible mobility buses.

KEY CHARACTERISTICS

Organization Type: Agency

Operating Model: Demand Responsive

Annual Ridership: 2,500

Vehicles Owned: 2 accessible mobility buses

Eligibility: Citizens who require accessible transportation

Geographic Focus: Primarily in North Grenville – trips to urban areas (Ottawa, Brockville, etc.) can be coordinated at a fee for service

Approximately 2,500 trips are made annually with most services provided daily between 8:00am and 5:00pm. Services must be pre-booked. Most clients use the service to access urban areas like Ottawa, Brockville, and Smiths Falls from their homes in North Grenville. Because it operates a taxi-like service, fares are variable depending on the trip's origin and destination. However, flat-rate monthly passes are available for $195. Passenger fares recover about 40 percent of costs, while municipal subsidies cover 20 percent, donations cover 10 percent, and organizations such as the United Way cover the remaining 30 percent.

North Grenville Accessible Transportation has indicated that it would like to partner with other services and community agencies to provide an integrated accessible public transportation system in the community.

Kemptville Transportation Services

Kemptville Transportation Services is an organization that provides fixed-route service geared mainly to citizens of the community of Kemptville, located within the Municipality of North Grenville. It is an OC Transpo Rural Partner, and provides commuter service to the Ottawa/Gatineau area via Routes 542 and 543. The routes are primarily geared to commuters, providing peak hour, peak direction service only. The organization owns three vehicles and employs seven part-time bus drivers who transport an annual ridership of approximately 26,000. Funding for the service is provided by the Ontario Ministry of Social Service and OC Transpo. A fare is also charged to passengers to use the service.

KEY CHARACTERISTICS

Organization Type: Agency

Operating Model: Fixed Route, Flex Route, and Demand Responsive

Annual Ridership: 26,000

Vehicles Owned: 3

Eligibility: Anyone

Geographic Focus: Kemptville to Ottawa/Gatineau

Community and Primary Health Care

Community and Primary Health Care is a member agency of the United Way that provides demand-responsive volunteer-driven transportation services in Leeds and Grenville. Residents over the age of 18 who have cognitive or physical impairments and/or illnesses are eligible for the service. Transportation is provided door-to-door and is used to bring clients to medical appointments, shopping, and various social activities. The organization has locations in Brockville, Athens, Gananoque, Prescott, and Westport. Drivers are reimbursed for their mileage, but volunteer their time and vehicles to provide the service. Passengers do not pay any costs.

KEY CHARACTERISTICS

Organization Type: Agency

Operating Model: Demand Responsive / Volunteer Drivers

Annual Ridership: Unknown

Vehicles Owned: Volunteers use own vehicles

Eligibility: Persons with disabilities (seniors only); Persons receiving medical treatment or health services at health facilities

Geographic Focus: Brockville, Athens, Gananoque, Seely's Bay, Landsdowne, and Mallorytown

Student Transportation of Eastern Ontario

Student Transportation of Eastern Ontario (STEO) coordinates the planning and delivery of transportation services for the Catholic District School Board of Eastern Ontario and the Upper Canada District School Board across Eastern Ontario, including the United Counties of Leeds and Grenville. In total, approximately 35,000 students are transported daily using a fleet of approximately 600 school buses and 200 accessible minivans. Delivery of services is contracted to various private school bus providers. STEO also provides driver training, takes requests for charters and employs route planners for each region. Their role is to schedule trips for the contracted services using a scheduling and dispatch software program.

KEY CHARACTERISTICS

Organization Type: Transportation Consortium representing two school boards

Operating Model: Fixed Route and School Bus Service

Annual Ridership: 6 million

Vehicles Owned: Contract service to 200 accessible minivans; 600 school buses

Eligibility: Children

Geographic Focus: Eastern Ontario

Westport Lions Club

The Westport Lions Club provides transportation services to citizens in the community of Westport and neighbouring townships. The organization owns one accessible mobility bus, which provides demand-responsive door-to-door service. The transportation service is operated by a team of approximately 10 volunteers. Eligibility is not restricted to a certain demographic, although most users of the service are elderly patients headed to medical appointments. No set fares are charged, however, passengers are asked to donate whatever they can afford. The service is funded 100 percent by donations.

KEY CHARACTERISTICS

Organization Type: Agency

Operating Model: Demand Responsive

Annual Ridership: Unknown

Vehicles Owned: 1 accessible mobility bus

Eligibility: Anyone

Geographic Focus: Village of Westport; Rideau Township; and Bedford Township

Wubs Transit

Wubs Transit is a private operator that provides a combination of transportation services, including school buses, personalized charters, and accessible transportation. It is a regional transportation service provider that operates throughout the United Counties of Leeds and Grenville, North and South Dundas, and the City of Ottawa. Wubs Transit has a fleet of ten vehicles, comprised of two accessible mobility buses (owned by North Grenville Accessible Transportation), one non-accessible transit bus, and seven school buses. It employs nine part-time drivers.

VIA Rail

VIA Rail provides service to Brockville on its Toronto-Ottawa and Toronto-Montréal routes. The Brockville Train Station provides weekday access to six (6) daily trains to/from Toronto, five (5) daily trains to/from Ottawa, and three (3) daily trains to/from Montréal and intermediate points. Service is slightly reduced weekends.

Gananoque also has VIA Rail service, although it is far more limited than the service to/from Brockville. One daily train in each direction stops in Gananoque, providing service to Toronto and Ottawa.

Coach Canada

Megabus is an intercity bus line operated by Coach Canada on the Toronto-Montréal route. Three daily buses in each direction provide service from Brockville to Toronto, Montréal, Kingston, and Cornwall. Megabus does not have a terminal in Brockville, opting instead to pick up and drop off passengers from the Food Basics supermarket, located near the Highway 401/Stewart Boulevard Interchange.

Greyhound

Greyhound provides limited intercity bus service to Brockville, with a route operating four days a week to Ottawa. Service is provided on Monday, Tuesday, Friday, and Sunday, and operates from Mac's Milk Convenience Store parking lot on Stewart Boulevard in Brockville.

Lanark Transportation Association

Lanark Transportation Association (LTA) provides demand responsive, wheelchair accessible transportation to eligible residents of Lanark County and the Town of Smiths Falls to travel to and from medical appointments and other specialized services. The LTA also provides transportation for non-emergency, non-ambulance, inter-facility medical transfers between long term care facilities and hospitals. Ridership has grown from 1,460 trips in 2003 to 14,260 trips in 2010. LTA is comprised of twelve paid drivers using agency vehicles and four volunteer drivers using personal vehicles. Fees vary based on the client's destination. Rides must be booked one to two weeks in advance. Funding is achieved through fare recovery, grants and the remainder through provincial and federal gas tax.

Key Stakeholders

Having developed an inventory of existing service providers, the next step in the process is to identify other stakeholders that can potentially contribute to the coordinated framework. This can include agencies that refer clients to or provide funding for a transportation service, municipalities that may operate or provide funding for part of the coordinated framework, employers, local service clubs, charities, citizen groups or others that have an interest in improving mobility within the community.

Each stakeholder group that will be involved in the partnership must have the ability to contribute to the coordinated framework, either in terms of funding, resources, or in-kind services. Within United

Counties of Leeds and Grenville, a number of potential stakeholders were identified through the on-line survey. Only stakeholders that have responded to the survey are shown and as a coordination partnership goes through the development process, more participants will need to be identified.

Community Support Organizations

There are many community support organization located in the United Counties of Leeds and Grenville that serve clients who often do not have access to reliable means of transportation. These organizations, identified as stakeholders, share a common interest in increasing accessibility throughout Leeds and Grenville. They include the following:

- Assault Response & Care Centre;
- Brockville Cycling Advisory Committee;
- Canadian Red Cross;
- Child Development Centre;
- Children's Mental Health of Leeds and Grenville/Making Play Possible;
- CSE Consulting;
- Developmental Services of Leeds and Grenville;
- Employment and Education Centre;
- Every Kid in our Communities;
- KEYS Job Centre;
- Leeds and Grenville Immigration Partnership;
- Ontario Disability Support Program;
- The Salvation Army;
- TriCounty Addiction Services;
- United Counties of Leeds and Grenville Social Services;
- United Way Leeds and Grenville;
- Victim Services of Leeds and Grenville; and
- YMCA of Brockville and Area.

Currently, some of the organizations listed above facilitate transportation, through strategies such as travel subsidies, limited door-to-door volunteer-driven service, and coordination and referrals to other transportation providers. A common theme identified in the survey responses was that on their own, these organizations do not have the available resources to effectively arrange transportation over such a geographically large area. Instead, a coordinated network would provide greater reliability and accessibility for the organizations and their clients alike. Many of the people served by these organizations are elderly, lower income, and experiencing physical or mental issues, factors which decrease their mobility and increase their reliance on others for transportation. Creating a better

transportation system throughout the United Counties of Leeds and Grenville would allow these organizations to focus less on the cost and hassle related to logistics, resulting in better service and access to for their clients.

Education

As would be expected, the educational facilities within the United Counties of Leeds and Grenville generally serve younger people, a demographic with reduced independent mobility. The catchment area for these facilities is large, and transportation and accessibility can sometimes be present issues. The following educational institutions responded to the survey as stakeholders:

- Brockville Public Library
- Gananoque Secondary School
- Language Express Preschool Speech-Language Program
- Rideau District High School
- Rideau Lakes Public Library
- TR Leger School

Schools in Leeds and Grenville are served by Student Transportation of Eastern Ontario, which operates a fleet of school buses that transports students between their homes and schools. However, the stakeholders have identified that a lack of coordinated transportation poses problems for students enrolled in co-op placements or other special programs, because no transportation is provided to these outside locations. Furthermore, the libraries do not provide any type of transportation assistance, which makes it difficult for some patrons to access them. Any effort to improve transportation to these stakeholders should form part of a larger, integrated network, serving the population of Leeds and Grenville as a whole.

Healthcare

Healthcare providers and institutions in the United Counties of Leeds and Grenville rely on two primary methods of transportation for their patients. Emergency transportation is provided by the county's ambulance service, while local health units do not have any structured transportation systems. Instead, they rely on a combination of referrals to transportation services, travel assistance/subsidies for patients, and sporadic rides provided by volunteers. The interests and transportation goals of this group of stakeholders is similar to those of the community support organizations. The two healthcare providers that answered the survey are:

- Country Roads Community Health
- Leeds, Grenville and Lanark District Health Unit

Governments and Municipalities

Municipal governments, along with the county government of Leeds and Grenville, have a vested interest in the development of a comprehensive transit strategy and network that serves their citizens. Increasing accessibility throughout the United Counties of Leeds and Grenville would allow municipal and county services to be reached by all segments of the population. Stakeholders that responded to the survey include:

- City of Brockville;
- Municipality of North Grenville;
- Township of Edwardsburgh/Cardinal;
- Township of Augusta;
- Township of Rideau Lakes;
- United Counties of Leeds and Grenville; and
- Village of Merrickville-Wolford.

Some of the municipalities surveyed indicated that they would consider funding an integrated transportation network, while others expressed hesitation. Sharing resources and costs may decrease the funding burden for some municipalities, while others may have to contribute more than they currently do. Comments also indicated that school buses could and should be put to better use during non-peak hours, as they provide significant transportation capacity but sit unused most of the day.

Summary

The on-line questionnaire and follow-up stakeholder workshop revealed a number of existing transportation services in United Counties of Leeds and Grenville and opportunities to improve service. These are assessed in Step 3 below.

STEP 3 Identify Service Demand and Gaps/Implementation Issues and Opportunities

The purpose of Step 3 is to expand on the data gathering completed in Step 2 to determine service demands and gaps as well as implementation issues and opportunities. This will help determine the type of coordination model that should be implemented or whether coordination is a feasible solution. In certain cases, the problem is a resource issue which is better solved through additional funding rather than coordination.

Service Demand and Gaps

A number of gaps in service were identified as part of the consultation process. These were prioritized by the consulting team based on interviews with stakeholders and through the survey results. This should be confirmed by the partnership through a more detailed review of travel patterns and the number of trips not accommodated.

1. **Capacity Issues:** Previous studies have indicated that limited or unavailable transportation options are an issue that imposes economic, social and medical hardship on many citizens in the United Counties. While there are a number of transportation providers in place, there are many needs that are not being accommodated. Resources are being tied up for long periods of time delivering medical trips outside of the County. These long distance trips can tie up a vehicle for half of the day and often an entire day; limiting the ability to accommodate additional discretionary trips such as trips to access groceries, banking, etc.
2. **Affordability:** A number of existing transportation providers charge a per km rate for long-distance trips. Given the large geography of Leeds & Grenville, the cost to receive service can be unaffordable for a number of residents, particularly youth and seniors. The issue of affordability was identified as a key mobility gap, particularly residents in rural areas far removed from major urban centres.
3. **Geographic Availability:** A number of low income residents live in small rural areas throughout the County due to low housing costs. However, these communities don't have all of the necessary services. Residents without a car have difficulty accessing the services they need for everyday living. These areas also have limited transportation options due to the low density nature of land use.
4. **Ease of Understanding:** There are a number of transportation services available with various eligibility criteria. As a result, a number of residents are unaware of their eligibility and how to access available transportation services or the potential for subsidies through various Ministries or non-governmental organizations.

Implementation Issues and Opportunities

A number of implementation issues and opportunities were also identified as part of the consultation process. These are important to understand as they have a direct influence on the type of coordination model selected. These include:

Implementation Issues

1. **Previous Unsuccessful Attempt at Coordination:** In 2009, a number of organizations led by Every Kid in Our Committees implemented a pilot program to coordinate transportation within the United Counties. There were two different operating models that were used, including contracting the service to Lanark Transportation Association and using volunteers. While the pilot was successful in improving transportation services, it was ultimately cancelled in 2011 due

to a lack of sustainable funding. While this experience presents an opportunity, it may also be an implementation issue as certain organizations or decision makers may not want to go through the process again. Clear communication must be in place to articulate how lessons learned will be used to ensure the second attempt at coordinated transportation will be successful.

2. **Numerous Potential Transportation Partners and Partner Agencies:** There are a number of transportation providers and agencies that provide or refer residents to transportation services within the region. Approximately 40 agencies formed part of the initial transportation pilot. This can lead to uncertainty of roles and responsibilities, particularly if there is not strong leadership. This will need to be managed by the working group with the objective of keeping things simple at the beginning and clearly communicating roles and responsibilities to each partner.
3. **Dispersed Nature of Travel Demand:** One of the challenges in providing cost effective transportation services in Leeds and Grenville is that travel patterns are very dispersed, which makes it difficult to concentrate services on a corridor, increase vehicle occupancy and operate a fixed corridor route. Residents in North Leeds and Grenville have a strong attraction to Smith Falls and Ottawa. In the southwest, there is a strong attraction to Brockville and Kingston and in the southeast, there is a strong attraction to Brockville and Ottawa. This dispersed nature of travel makes it difficult to operate financial sustainable transportation services.
4. **Resources/Driver Availability:** There are not enough vehicles or drivers to meet the current demand. Some existing services have vehicles that are under-utilized due to limited driver availability. Additional drivers/vehicles are needed in order to meet the current demand; however, funding is also an issue to pay for these additional resources. Volunteer demand responsive services have difficulty recruiting volunteer drivers in certain areas of the County. Private providers have vehicles that are under-utilized.

Opportunities

1. **Past Experience with Coordination:** As mentioned above, Every Kid in Our Community led a coordinated transportation pilot program for over two years. While the pilot was ultimately discontinued due to a lack of sustainable transportation funding, the experience and lessons learned from this initial partnership will be valuable in developing a coordinated transportation framework. There is also a culture of partnerships between many of the agencies that previously participated in the pilot that continues today. Much of the upfront work identified in Steps 1 through 3 is already complete and should require minimal effort to update.
2. **Existing Scheduling Software Program:** Student Transportation of Eastern Ontario has an existing scheduling software program in place and a desire to be part of the solution. The group currently coordinates the planning and delivery of transportation services for school boards across Eastern Ontario, including the United Counties of Leeds and Grenville. In total, approximately 35,000 students are transported daily using a fleet of approximately 600 school buses and 200 accessible minivans. This is done through a scheduling and dispatch software

program that is used to cost effectively deliver services between the different providers. This program and the staff that operate it can be adapted for use by the partnership to deliver a coordinated transportation solution. The opportunity to use this expertise and resource should be assessed.

3. **LHIN Support for Integrated Service Delivery:** The South East LHIN works closely with a number of existing agencies to help improve transportation issues for seniors and persons with disabilities. The advantage of this LHIN is a willingness to partner with municipalities to fund coordinated transportation that not only meets the needs of seniors and persons with disabilities, but also all members of the community. Examples include funding for coordinated transportation projects in Bancroft (Trout) and north-south Frontenac. Since the LHINs focus is still on healthcare, there is a need to ensure the aging at home needs continue to be met with their portion of funding, however, there is a recognition that more can be accomplished by pooling funding into one coordinated system instead of having separate systems in a municipality.
4. **Gas Tax Funding:** None of the municipalities within the two Counties receive provincial gas tax funding. The United Counties could benefit from a significant increase in revenue towards transit services if they were responsible for (directly or through agreement with another transportation provider in the partnership) the delivery of public transit or community transportation services. This revenue could be used to expand services to meet the various gaps in the community.

STEP 4 Assess Different Levels of Coordination

The review of existing transportation services within the United Counties of Leeds & Grenville revealed a desire among several organizations to improve rural transportation. There is a strong culture of working together among the various agencies and past experience with coordinated transportation that the partnership can draw on. There are also numerous transportation providers in place with paid drivers that operate a fleet of vans and buses as well as a pool of volunteers using their own vehicles.

The South East LHIN seems supportive of establishing coordinated transportation frameworks if it improves transportation services for the clients and meets their overall aging at home mandate. Finally, no existing transportation service in the United Counties is benefitting from provincial gas tax funding. There is the opportunity to potentially access this funding when developing a coordination model.

The four coordination models were assessed to determine their applicability within the United Counties of Leeds & Grenville. The lead partner for Models 1 through 3 is not known at this point and would need to be confirmed by the Transportation Coordination Working Group.

Model 1: Centralized Control

This model represents the highest degree of coordination and would involve a lead partner taking over all aspects of transportation on behalf of the partnership. Existing transportation service providers such as the North Grenville Transportation, Westport Lions Club, Kemptville Transportation Services would need to transfer ownership of their vehicles, operating resources and funding earmarked to transportation services to the lead partner.

The benefit of this model is that it provides the highest degree of coordination as the entire fleet would be available and decisions would be made that maximize the efficiency of the trip. This model also allows the various agencies to focus their efforts on the key elements of their mandates which are not transportation related.

Based on the stakeholder consultation completed, no organization was identified as having the resources or desire to take on this primary transportation role.

The County does not own any vehicles and has no experience with transportation operations. There are also too many agencies each with different mandates. There are a number of smaller agencies that operate at a grass roots level and do not appear to be willing to give up control of their operations and lose sight of their specific mandate. Creating a Central Coordination Model would impact these reporting structures and require too many stakeholders at the table.

For these reasons, this model is not recommended.

Model 2: Brokerage – Central Coordination

In this model, a lead organization is responsible for the planning, scheduling and dispatch of transportation services. Delivery of trips continues to be completed by each of the partner organizations.

The benefit of this model for Leeds and Grenville is that it follows a similar structure as the 2009 pilot project led by Every Kid in Our Communities. While the pilot was cancelled, the reason was due to a lack of sustainable funding and not due to the overall structure of the partnership. There are a number of transportation providers and stakeholders in Leeds and Grenville, and each have a strong desire to maintain a grass roots approach to transportation service delivery.

This model allows this to occur.

The model also maximizes the potential for coordination without requiring the County or the lead partner to get into the business of vehicle purchases and hiring drivers. The role of the lead partner, instead, would be as a coordinating body for all trips. It also allows various different mandates to be retained. This is a role that was completed by Every Kid in Our Communities in the past. The model also allows the partnership to better utilize some of the existing resources in place within the community, such as the Student Transportation of Eastern Ontario's existing scheduling and dispatch software program to coordinate trips.

For these reasons, it is recommended that this model be carried over by the coordination working group for further review.

Model 3: Brokerage – Confirmation-Based Coordination

This model is similar to Model 2. The big difference is that in this model the lead partner must confirm the booking of any coordinated trips with the partner agency providing the service before it is confirmed. The advantages and disadvantages are similar to the Model 2. The difference is the extra step required to book a trip and that the opportunity for coordination is less than in the Brokerage –Central Coordination Model.

This may be an appropriate model to explore for Leeds and Grenville, particularly as trust is built during the partnership. For these reasons, it is recommended that this model be carried over for further review.

Model 4: Voluntary Cooperation

This model is the first step toward greater coordination and is already occurring in Leeds and Grenville. A number of agencies are already coordinating and sharing best practices. As part of the previous transportation pilot program, a 1-800 number was set up to act as a resource for residents to determine transportation options available to them. This was successful in informing residents about how and where to access transportation services, but it does not increase the availability of transportation services as much as Models 2 and 3 would.

The other disadvantage of this model is that there is a small role for Leeds and Grenville or any of the local municipalities. The main advantage of having the County as the lead is the potential to access provincial gas tax funds. This will only occur if the County is responsible for the partnership.

Adopting this model would not lead to a noticeable improvement in efficiencies and level of service to customers. For this reason, this model is not recommended.

STEP 5 Identify the Building Blocks of the Preferred Coordination Models

In Step 4, two of the four coordination models were considered for further review: Model 2: Brokerage Model - Central Coordination and Model 3: Brokerage Model – Confirmation-Based Coordination.

With these models in mind, each of the building blocks that make up a coordinated transportation framework will need to be assessed by the partnership working group. This includes service delivery, scheduling and dispatch, vehicle maintenance, etc. The application of each of these building blocks to the preferred Leeds and Grenville model is documented below.

Service Planning

Under both models, the lead partner would be responsible for service planning. The lead role for this function would need to be taken on by a member of the partnership that has some expertise in this role and the ability to see the broader picture. The partnership may also choose to bring in outside 'objective' expertise to assist (particularly during the start-up).

Key activities that would form part of this function include:

5. Working with some of the existing fixed route transportation providers (e.g. Wubs Transportations) to establish scheduled fixed route services between urban centres within and adjacent to the County.
6. Establishing a coordination plan that would use the various demand responsive services as feeders for the scheduled fixed routes.
7. Working with Brockville Transit to establish potential for service integration between the Leeds and Grenville transportation services and Brockville Transit services. Similar agreements as made with OC Transpo for its Rural Transportation Services should be explored.
8. Working with Lanark Transportation Association to establish potential integration with this service provider for the northern municipalities.

Coordinated service planning is required under the Brokerage - Central Coordination Model and optional under the Brokerage – Confirmation-Based Model, however, it is still recommended.

The function is fairly easy to implement with the assistance of outside expertise or experience within the partnership. Step 6 below provides some preliminary recommendations of options that the partnership group should begin to explore.

Improving connectivity between the different types of services identified above will also increase the effectiveness and efficiency of all services and provide additional capacity to meet the needs of more residents. There may be an initial cost to hire outside expertise to develop a service plan.

Customer Service / Intake Process / Scheduling and Dispatch

These three functions are assessed together because they all involve the partnership setting up a central office that will be the main interface point for customers requesting trips or getting information about the service.

This would be the responsibility of the lead partner. In choosing a lead partner, it is important to have someone with experience in coordinating or operating transportation services. Student Transportation Services of Eastern Ontario currently employs a number of Route Planners that schedule service using a scheduling and dispatch software program. This includes service for both conventional school buses and accessible buses for students with disabilities. The potential to capitalize on this resource should be explored by the partnership. It would likely involve hiring new customer service staff and training them on the use of the scheduling software package. By cross training all staff, back-up would also be available, particularly when staff are sick or on vacation. A central phone number would need to be established that is separate from the Student Transportation Services of Eastern Ontario number to avoid any brand confusion from residents.

There are currently over 40,000 rural transportation trips being delivered annually in Leeds and Grenville, not including Brockville Transit and school bus trips. The majority of trips are focused in North Grenville for either workers destined to Ottawa or seniors and persons with disabilities for medical trips. Demand for trips is likely two times greater than what is being supplied today and some markets are not served at all.

At this level of annual ridership a centralized scheduling software program would be beneficial to enhance the number of shared trips. The use of this software can increase the efficiency of service delivered by as much as 15 percent.

The scheduling program would also be useful for coordinating trips between demand responsive services and any new scheduled fixed route corridor service that may be implemented. This helps minimize resource requirements for long-distance trips within the United Counties. The partnership would need to assess the cost, benefit and its contribution towards the scheduling software program licensing fee currently paid for by Student Transportation Services of Eastern Ontario before going down this route.

Centralized customer service is a logical extension of the centralized reservation/dispatch office. Initial calls regarding passenger inquiries, complaints or compliments should be handled by the central office, and potentially redirected to one of the partner agencies, depending on the extent of the issue.

For the intake process, this will require more investigation between the partners involved in the coordinated framework. The Student Transportation Services of Eastern Ontario may not be the most appropriate partner organization to take on this function since most intake requirements are geared towards seniors and persons with disabilities. At this point, it is recommended that client intake still be conducted by each partner agency. However, information about all transportation programs should be made available on the central website and to customer service staff to inform residents about the options available to them. If calls are received regarding client registration at the central reservation/dispatch office, they could be directed to the right agency partner by asking two to three clarifying questions to determine potential eligibility.

Given the volume of calls that currently take place, it is recommended that the central dispatch office be staffed with 3-4 reservationists / dispatchers and customer service staff (Transportation Coordinators). Under the Brokerage Model, some of the existing transportation coordinators could be trained to perform these roles. This would lead to a reduction in the number of existing staff required to perform this function. Under the Confirmation Based Brokerage Model (Model 3), there is less of a savings in staff time since each partner agency providing service would likely be involved in transportation coordination.

Marketing / Awareness

It is recommended that a central brand be developed for the partnership. Based on initial review, there is already a strong awareness of transportation services in certain parts of the region such as Westport and North Grenville. However, if the partnership is going to address some of the needs in other parts of the county, particularly for youth and adults, a central brand and awareness campaign should be developed.

To maintain a local connection, the support provided by each partner in the organization should be identified in marketing and communications material. This is especially important in the initial stages of the partnership.

Some initial funding would need to be put in place to develop a brand and communication strategy. Outside marketing and branding expertise may be sought.

Eligibility Criteria

The partnership will need to review the eligibility criteria of all participating agencies. Where the eligibility criteria are similar, efforts should be made to standardize. This increases the ability to coordinate trips between differ partners in the network.

Policies and Procedures / Passenger Fares

The policies and procedures of each of the partners will need to be reviewed once they have confirmed their participation in the partnership.

The ability to standardize passenger fares and kilometre rates will also help enhance the ease in which coordination takes place.

Vehicle Purchase, Vehicle Maintenance, Driver Training

Based on the initial review, there are approximately seven accessible buses, seven school buses and two to three vans available to provide service throughout the County. This does not include service provided by Brockville Transit which owns another seven accessible vehicles. Currently, there is no consistency in the type of vehicle. Private carriers and school bus operators that would be contracted to operate fixed route services own and maintain their own vehicles.

Unless there is a significant expansion in the number of vehicles, there is no real benefit to coordinating vehicle purchases. However, vehicle specifications should be reviewed and agreed to by the partnership to ensure all future vehicles are consistent in their ability to accommodate passengers with mobility devices.

There is some value in developing a standard driver training program that could be used for paid drivers and volunteers. The Student Transportation Services of Eastern Ontario already has a driver training program in place for school bus drivers and this may be a good place to start. This would ensure that all drivers have the same safety and customer service training.

Volunteer Recruitment and Training

At the initial stages of the partnership, coordination of volunteer recruitment may be a challenge, particularly if the partnership brand is no longer associated with a local agency. This function should be addressed in later years of the partnership.

STEP 6 Select a Preferred Coordination Model

Within Leeds and Grenville, it is recommended that either Brokerage Model (Central Coordination or Confirmation Based) be explored. The partnership would be between the County, participating local municipalities, existing transportation providers, social service agencies that refer clients to transportation services, the Student Transportation Services of Eastern Ontario and employers. Every Kid in Our Communities should be a key player in the partnership given its past experience with the

transportation pilot project. Private sector bus and school bus operators would be used to enhance corridor or fixed route service, but would not form part of the partnership.

To be successful, it is recommended that Every Kid in Our Communities work with the County to act as a coordinating body for the partnership group. In this role, the County would rely on the expertise of the group in service planning and delivery, but would be accountable to the service. With some funding contribution, it would allow the County to approach the province to receive provincial gas tax funding. This funding must flow through a municipality.

A lead partner would also need to be selected to schedule and dispatch trips, handle customer service requests and monitor the service. This may be the Student Transportation Services of Eastern Ontario given their existing experience and access to a robust scheduling and dispatch software program. Other partner agencies would contribute through funding, in-kind use of vehicles, resources and/or expertise. The lead partner would not take ownership of any of the vehicles.

Given the service needs and gaps identified in Step 4, it is recommended that two working groups be formed to address immediate coordination opportunities as well as the need for improved services for students and employees seeking to access major employers in the County.

Based on the above review, the following opportunities should be explored by each of these working groups to improve transportation services in Leeds and Grenville:

Coordination Opportunities

Within the coordinated framework, one working group of existing service providers could be set up to assess the opportunity to improve the demand responsive services already in place. This working group would work from the bottom-up to build on existing coordination and keep the momentum going. There are some additional aspects of coordination that could be easily implemented within these existing services. These include:

1. **Pursue Sustainable Funding to Grow:** One of the first tasks of the group is to identify additional funding sources to be able to expand transportation services. A lack of sustainable funding was one of the key reasons for the cancellation of the previous transportation pilot and access to sustainable funding is imperative to accommodate some up-front coordination costs and improve overall services within the framework.

   It is recommended that the group approach the County and/or any of the local municipalities to discuss the potential to access provincial gas tax funding. To receive gas tax funding, the County or one of the local municipalities would need to formally support and contribute financially to public transportation services. The amount contributed would in part influence how much they

receive (see **Chapter 5**). The funds received would flow through the lead municipality and be directed at expanding existing services.

In addition to gas tax funding, other sources of funding should be sought. A small transportation levy per household and business (e.g. $10 to $15 annually) would significantly increase the level of investment to expand transportation services. This has been successfully done in other municipalities, including the County of North Hastings to support the TROUT service.

The South East LHIN should also be approached to ensure that funding provided to existing service providers is not jeopardized if it begins to accept other types of riders (e.g. adults and youth) as part of the coordinated partnership. The South East LHIN has shown a previous willingness to develop coordinated transportation strategy where the mandate moves beyond seniors and persons with disabilities, so long as clear metrics are established to ensure that the portion of funding provided by the LHIN continues to serve their mandate.

2. **Assess the use of a Centralized Scheduling Software:** Investigate the use of the existing scheduling software program owned by the Student Transportation Services of Eastern Ontario. The purpose of a scheduling software program can be fairly expensive and requires significant hours of set-up and training. Based on initial discussions, the Student Transportation Services of Eastern Ontario has a willingness to explore a potential partnership to improve transportation services within Leeds and Grenville. The organization has the staff with the expertise to use the software and has already paid the fee to purchase the software. The working group would need to determine the cost of setting up and using the software, including initial set-up fees, annual licensing fees and annual salary for transportation coordinators. If this arrangement is not favourable, the partnership should also explore purchasing a stand-alone scheduling software program.

3. **Partnership with Adjacent Transit Providers:** It is also recommended that a partnership with Brockville Transit and Lanark Transportation Association be investigated. This would allow for seamless passenger transfers and potentially service schedule coordination. This would include coordination of any fixed route corridor services with Brockville Transit to ensure seamless transfers and fare integration. The ability to coordinate with Lanark Transportation Association for trips in North Leeds and Grenville should also be explored, particularly with cross boundary trips.

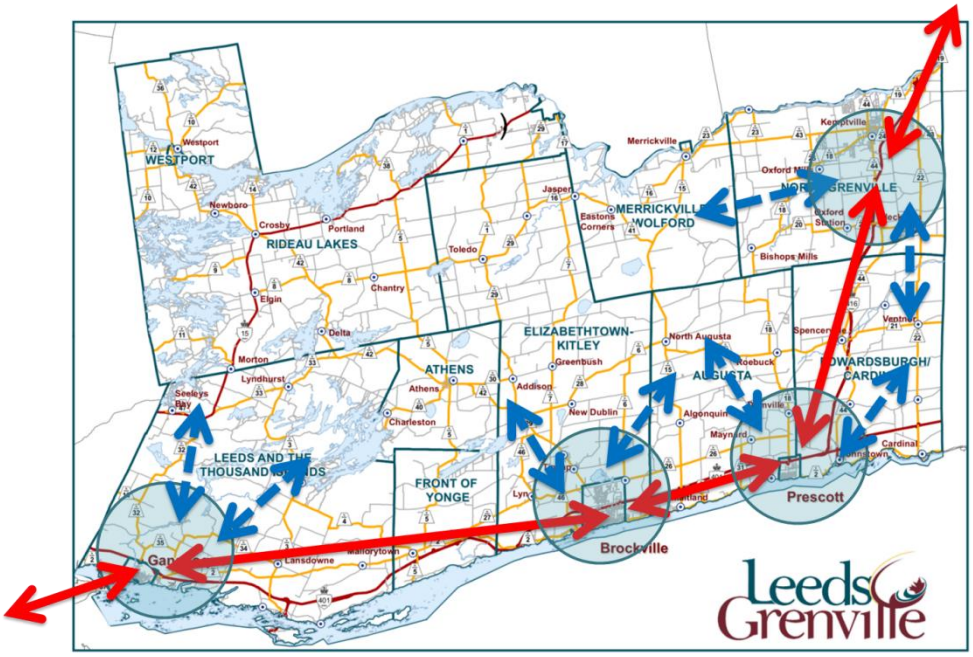
Potential New Services

A second working group should be created to assess new funding opportunities, the feasibility of developing more cost effective fixed route service to the major urban centres as well as purpose specific shuttle services for residents looking to access various services throughout the county. This group would take a top-down approach to service planning with a goal of improving transportation services for

seniors, youth and adults looking to access employment areas. Some potential improvements for this group to explore include:

1. **Implement Corridor Services:** Explore the opportunity to develop a fixed route service between major urban centres within and outside of Leeds and Grenville. Based on an initial review of population centres and major travel demands, the major transportation demand appears to be along the Highway 401 and 412 corridor connecting Kingston, Gananoque, Brockville, Prescott, Kemptville and Ottawa. This is illustrated in **Figure 11** below.

Figure 11 - Potential Corridor Service in Leeds and Grenville



Successful corridor services already exist between North Grenville (Kemptville) and Ottawa with fare integration between the rural service and OC Transpo. The objective would be to identify the potential to expand on this service to the other major destinations within Leeds and Grenville.

The distance between Gananoque and Brockville is approximately 50 km and the distance between Brockville and Kemptville is approximately 60 km. If a community agency charged a

rate of $0.45 cents per kilometre for demand responsive volunteer service, the cost of a one-way trip would be $22.5 and $27.0 respectively.[17]

Under a fixed route service, the travel time between Gananoque and Kemptville with 4-5 stops in urban centres is between approximately 60 to 90 minutes. If an hourly operating rate of $70.00 were charged to provide the service and a passenger fare of $10.00 to $15.00 were charged (depending on the length of the trip completed), the service would require 5 to 10 passengers per hour to break even (depending on the passenger fares, travel time and the destinations of each passenger).

The role of the working group would be to assess the potential travel demand along this corridor, establish a service schedule based on peak travel demand and establish a passenger fare.

For the corridor service to be successful, a coordination strategy with various demand responsive service and local fixed route services (e.g. Brockville Transit and North Grenville Accessible Transportation) would need to be developed to feed into the corridor service. Where there is an existing fixed route service in place such as Brockville, a designated transfer point would be established to feed into the corridor service. In communities with no existing local transit services (e.g. Front of Yonge), a demand responsive service would take a resident to the closest and most convenient transfer point on the corridor service to complete their trip. Key transfer points along the corridor could include Gananoque, Lansdowne, Brockville, Prescott, Spencerville and Kemptville. In some of these smaller communities (e.g. Prescott), the corridor service could provide a flex route pick-up and drop-off service for passengers that reserve the trip at least 24 hours in advance. For larger communities, demand responsive services, local transit or taxis would be used to complete the passenger trip.

Passenger profiles would need to be reviewed, particularly for frail seniors and persons with disabilities to identify who could safely use the corridor service. Some travel training for this market group would need to be applied.

The schedule for the corridor service could change based on demand. Where there is insufficient demand, the trip could still be accommodated using a demand responsive or volunteer service.

[17] Potential fare parity issues under the AODA legislation should be reviewed before proceeding with this option.

2. **Charter Services:** Opportunities to partner with various retailers, adult day centres, or other programs should also be explored by the working group. A well-advertised program that provides a bus service to major destinations on certain days of the week could be explored. For example, a Tuesday grocery store run in Rideau Lakes or a Wednesday shopping run to the 1000 Islands Mall or a monthly run sponsored by a local dentist could be established. This is a very effective transportation demand management tool to group passenger trips headed to the same destination. It also frees up existing demand responsive services to perform other priority medical trips where it is difficult to group passengers together.

   For this strategy to be successful, the working group would need to work collaboratively to identify travel patterns and potential needs within the community. The focus should be on discretionary trips that people are not restricted to by an appointment. This allows residents to adjust their schedules and travel on a set date and time. A reduced passenger fare could be charged for these runs as multiple passengers traveling in the same vehicle would increase the cost effectiveness of the service. The opportunity to receive sponsorship from retailers or services that the charter is focused on should also be sought.[18]

3. **Use of Taxis:** The working group should explore the number of local trips conducted within some of the larger urban areas such as Kemptville and explore the potential to have the service delivered by the taxi industry. There may be the ability to negotiate a preferred flat rate for in-town trips based on the volume of trips that are anticipated. For eligible passengers, they would pay a flat fee and the partnership would subsidize the remaining part of the fare. This approach is successfully used in Stratford, where eligible passengers pay a flat fare of $5.50 and the Community Care Agency pays the difference between the passenger fare and the preferred taxi rate fare of $7.00. In this situation, the use of taxis is more cost effective than providing the service using agency owned vehicles and it allows those vehicles to be better utilized for long-distance trips.

Next Steps

For the coordination model to be successful, leadership is required. It is suggested that a working group be formed to further develop immediate opportunities (within their span of control) in the areas outlined above.

[18] Potential fare parity issues under the AODA legislation should be reviewed before proceeding with this option.

It is recognized that there are gaps and travel markets not being addressed by the existing services and that the expansion of the fixed route service may provide a strong core service to address these deficiencies. This expansion may require new funding (e.g. gas tax support) and new partnerships (e.g. scheduling software program). Hence a planning-oriented working group should be formed to assess and address these opportunities and challenges.