



Financial Feasibility Assessment of Cost-Shared Transportation Model(s)

Rural Transportation Forum, Walkerton, ON

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Study Purpose

- **Illustrate different types of coordinated transportation models**
- **Outline challenges and potential solutions**
- **Develop a framework to identify and assess coordination opportunities**
- **Demonstrate the methodology to three study regions**



The “Rural” Challenge

Low Density / Long Distances



Limited Services &

Disconnected Systems

= Mobility Gaps



Defining Rural Transportation

Rural Transportation provides:

- **Seniors** – access to medical appointments and daily living to help age at home
- **Youth** – access to after school activities and employment
- **Low Income or Unemployed** – access to education, skills training and new jobs
- **Families** – with one or fewer household vehicles
- **Employers** – access to a qualified labour force

What is Coordination?

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



Objectives of Coordination

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

Steps to Establish a Coordinated Transportation Framework



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

Step 1 Process and Activities

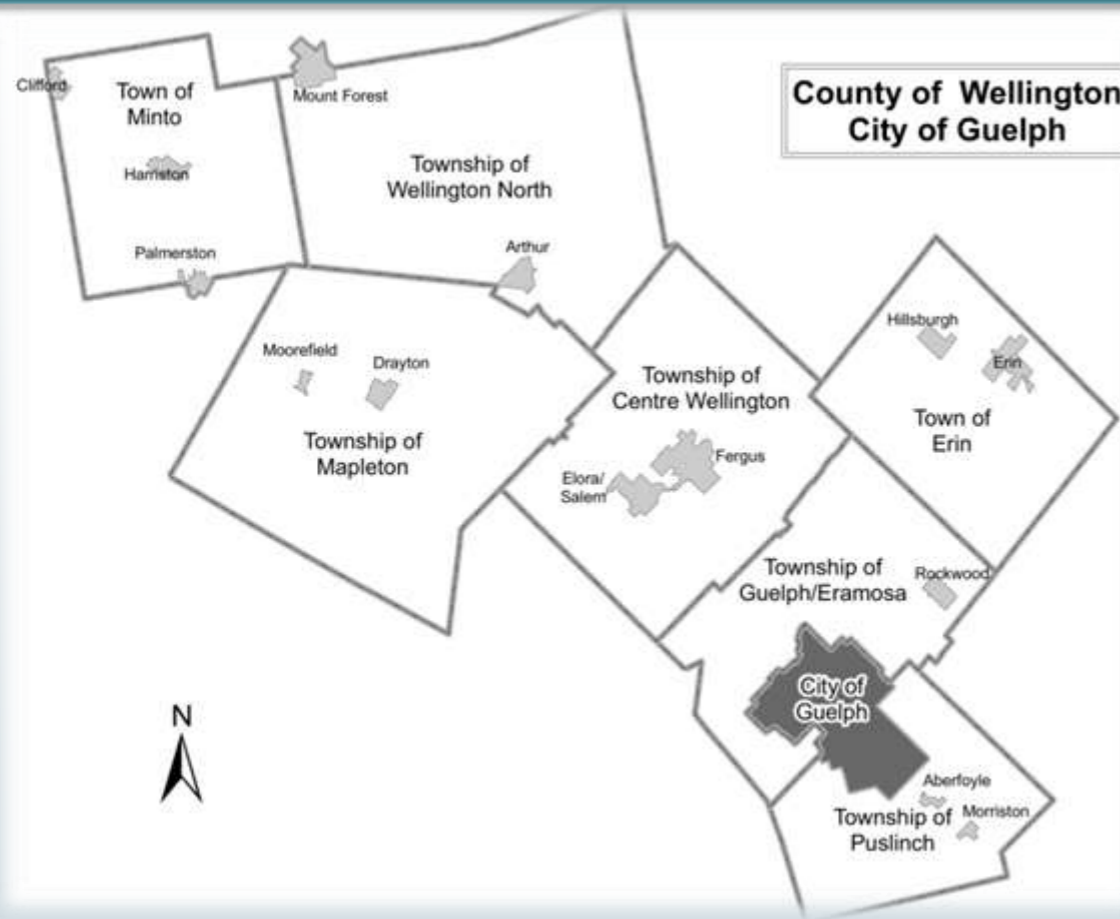
- Identify two or more parties that are willing to work together to explore the potential of a coordinated framework
- Work with agencies and funding partners to identify the potential to pool resources towards a common goal
- Identify a lead organization or champion
- Develop a vision for success, including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



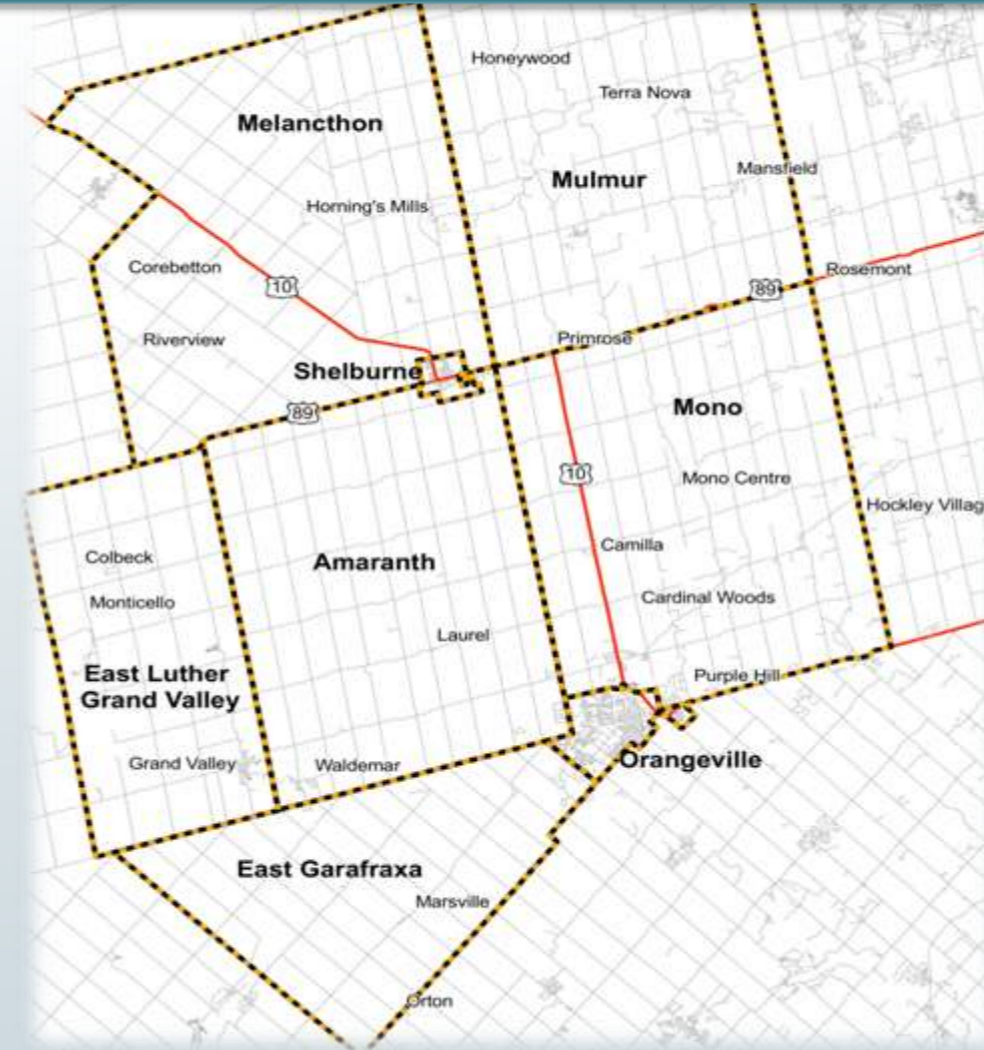
Step 1
 Identify Two or
 More Organizations
 that Share a
 Common Goal

Step 1 Study Regions

Wellington County



Dufferin County



Leeds and Grenville



Step 2

Inventory Existing
Transportation
Services and Key
Stakeholders

Step 2 Process and Activities

- Develop a comprehensive list of existing transportation providers and key stakeholders (web-search, online, mail or telephone surveys, follow-up questions)
- Develop a standard questionnaire or interview template to ensure consistency in data collection
- Compile existing resources, legislative requirements, funding sources, eligibility criteria, potential desire to participate in a partnership
- Organize data in a logical format for comparison purposes



Step 2

Inventory Existing
Transportation
Services and Key
Stakeholders

Existing Transportation Providers

Wellington County

- 7 community care agencies
- 3 adjacent municipal transit systems
- 2 private bus operators
- 2 Nursing homes with vehicles
- 18 taxi licenses
- School bus operators

Dufferin County

- 3 community care agencies
- 1 municipal transit system
- 1 private bus operator
- Day programs with vehicles but no drivers
- School bus operators

Step 3

Identify Service
Demand and Gaps /
Implementation Issues
and Opportunities

Step 3 Process and Activities

- Assess potential for future travel demand and identify gaps in service
- Conduct a workshop with the stakeholders to work through each type of service need or gap identified
- Identify potential implementation issues and opportunities
- Determine potential areas where coordination may help to resolve the service gap versus areas where expansion of existing resources is required

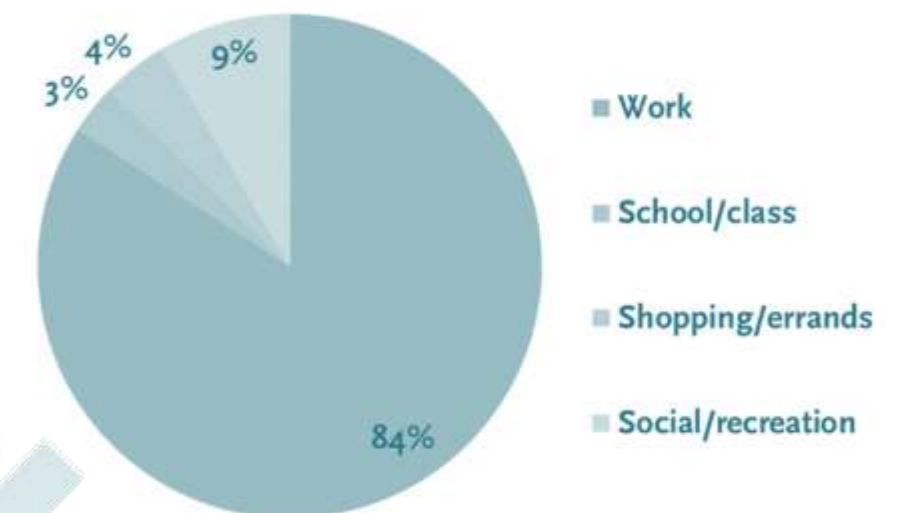
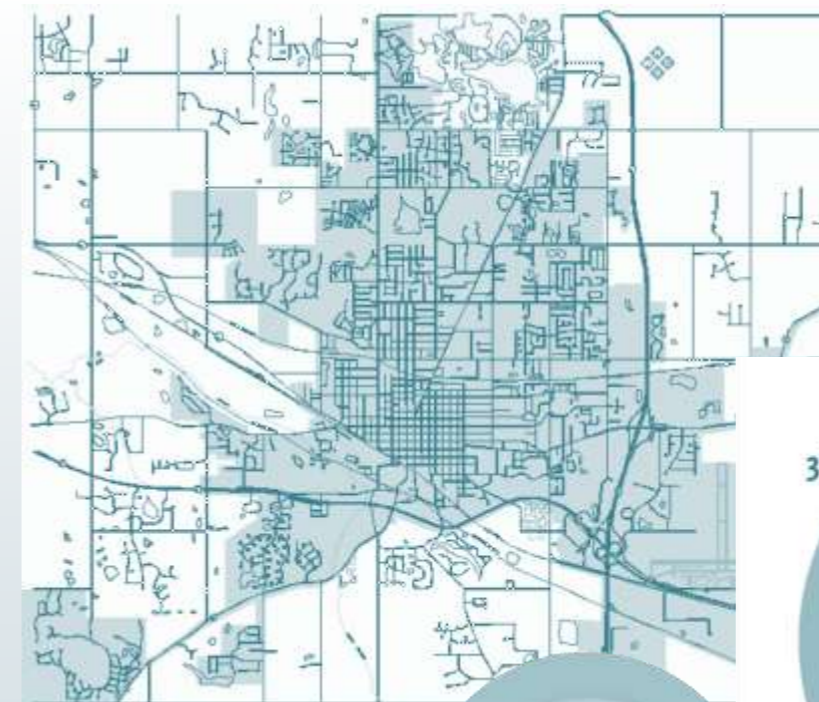


Step 3

Identify Service
Demand and Gaps /
Implementation Issues
and Opportunities

Step 3 Potential Gaps

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



Step 3

Identify Service
Demand and Gaps /
Implementation Issues
and Opportunities

Wellington Primary Service Gaps

- **Trip Purpose:** Majority of trips are for medical trips. The demand for work trips, social trips and youth travel is not being fully met.
- **Capacity Issues:** There is a challenge in meeting all trip requests for existing agencies due to the lack of resources
- **Eligibility:** Largest provider of transportation service is focused on seniors and persons with disabilities. Few options available for adults and students/children
- **Geographic Availability:** The majority of services focused around Fergus/Elora in Centre Wellington. The biggest service gap is in the northern areas of the County

Step 3

Identify Service
Demand and Gaps /
Implementation Issues
and Opportunities

Dufferin Primary Service Gaps

- **Trip Purpose:** Majority of trips are medical trips. The demand for work trips, school trips and social trips is not being fully met
- **Capacity Issues:** Dufferin County Community Support Services is the main service provider for seniors and persons with disabilities outside of Orangeville
Challenge in meeting all trip requests due to the lack of resources
Resources are often tied up for an entire day or half of the day
- **Eligibility:** There are fewer options available for adults and students/children

Step 3

Identify Service
Demand and Gaps /
Implementation Issues
and Opportunities

Step 3 Issues and Opportunities

Service Issues:

- Challenges in servicing unique population groups
- Privacy issues
- Stable and sustainable funding
- Differences in passenger fares or volunteer remuneration
- Upfront costs
- Different service hours
- Legislative requirements

Opportunities:

- Build on local networks and environment of trust and cooperation
- Existing brokerage applications
- Common database platform
- Access to new funding sources

Step 3

Identify Service
Demand and Gaps /
Implementation Issues
and Opportunities

Wellington Implementation Issues

- 1. Mandates/Funding Constraints:** Mandate to service seniors and persons with disabilities tied to funding received from the LHIN.
- 2. Funding Levels:** Sustainable funding is an issue for a number of existing providers.
- 3. Driver Availability:** There are not enough drivers to operate existing vehicles throughout the County (majority use volunteer drivers)

Step 3

Identify Service
Demand and Gaps /
Implementation Issues
and Opportunities

Wellington Opportunities

- 1. Existing Coordination:** Several agencies already coordinate transportation information through a central referral point (Wellington Transportation Services).
- 2. Municipal Support:** The County and several townships are interested in addressing transportation issues.
- 3. Guelph Transit:** Guelph Transit has a new scheduling software program and expertise that could be capitalized on.
- 4. Private Operators:** There is a limited fixed route service that could be built upon.
- 5. Provincial Gas Tax Funding:** Potential funding source to expand services.

Step 3

Identify Service
Demand and Gaps /
Implementation Issues
and Opportunities

Dufferin Implementation Issues

- 1. Limited Service Providers:** Very few transportation providers to coordinate with
- each are stretched.
- 2. Mandates/Funding Constraints:** Dufferin County Community Support Services
- mandate to service seniors and persons with disabilities tied to funding received from the LHIN.
- 3. Resources / Driver Availability:** There are not enough vehicles or drivers to meet the current demand.

Step 3

Identify Service
Demand and Gaps /
Implementation Issues
and Opportunities

Dufferin Opportunities

- 1. New Corridor Service:** Town of Shelburne will provide a fixed route commuter service during the AM and PM peak periods to connect to GO bus service
- 2. New Resource:** Dufferin County Community Support Services recently purchased an 8 seat passenger van for charter services. Opportunity to maximize use of this resource for day programming, charters etc.
- 3. Additional Resources:** Ontario Early Years Centre has a van used to provide their clients access to services, but it is not used regularly throughout the day. There may be an opportunity to further investigate the utilization of this vehicle
- 4. Provincial Gas Tax Funding:** Potential funding source to expand services

Step 4

Assess Different
Coordination
Models

Step 4 Process and Activities

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

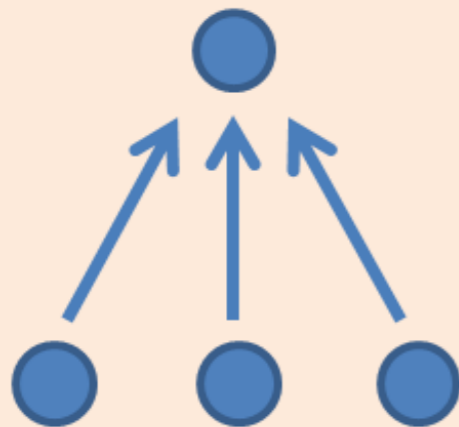


Step 4

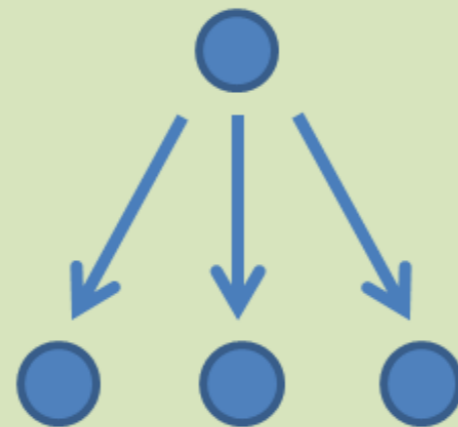
Assess Different
Coordination
Models

Step 4 Models to Consider

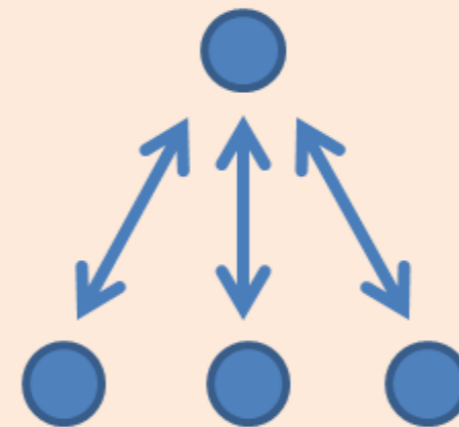
**Model 1:
Centralized Control**



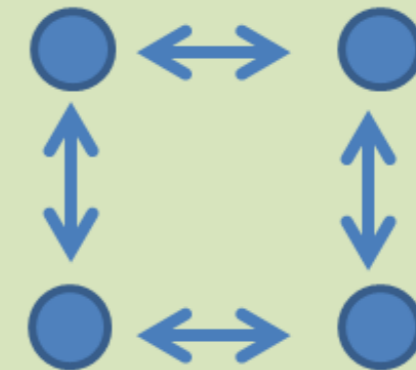
**Model 2:
Brokerage – Central
Coordination**



**Model 3:
Brokerage –
Confirmation Based**



**Model 4:
Voluntary
Cooperation**

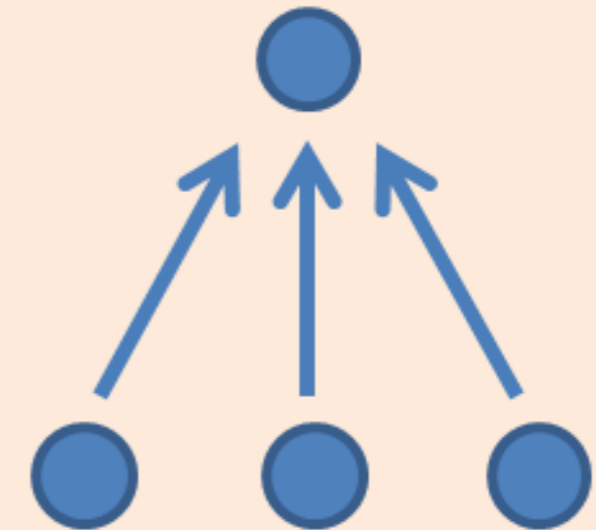


Step 4

Assess Different
Coordination
Models

**Step 4
Model 1**

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

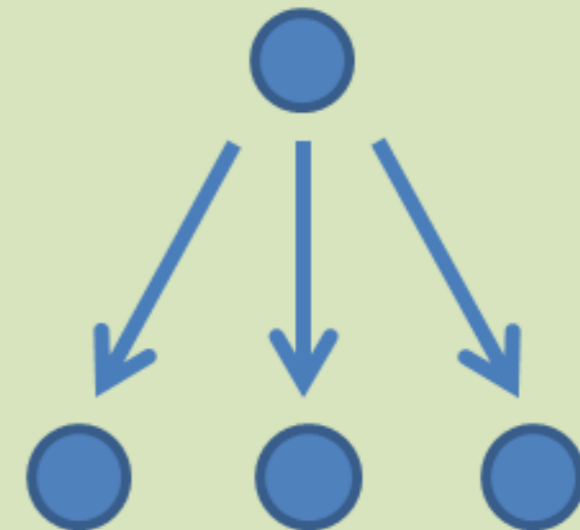
**Model 1:
Centralized Control**

Step 4

Assess Different
Coordination
Models

**Step 4
Model 2**

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

**Model 2:
Brokerage – Central
Coordination**

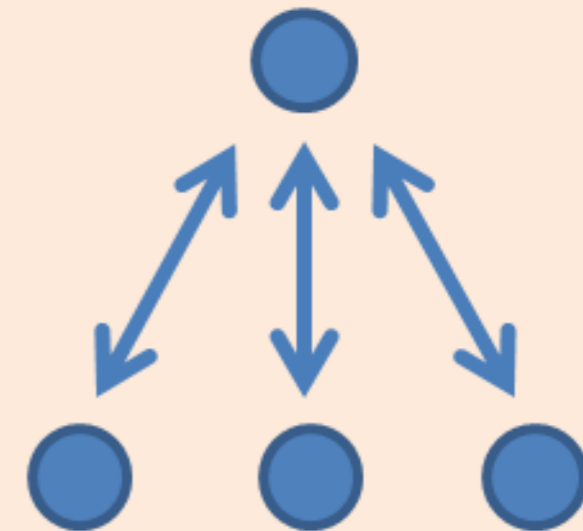
Step 4

Assess Different
Coordination
Models

Step 4 Model 3

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

Model 3: Brokerage – Confirmation Based



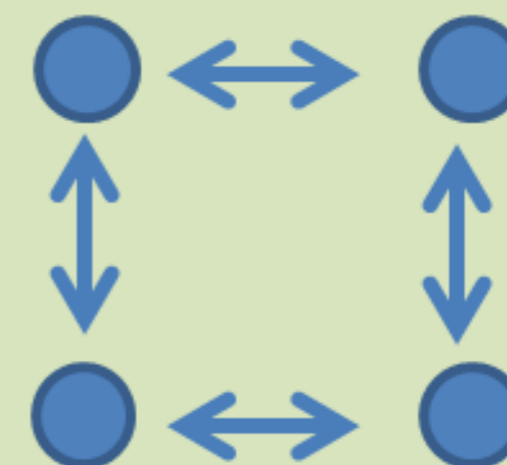
Step 4

Assess Different
Coordination
Models

Step 4 Model 4

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

Model 4: Voluntary Cooperation



Step 5

Assess Applications
for Coordination
Against Potential
Coordination
Models

Step 5 Process and Activities



- Discuss, evaluate and decide on the potential applications for coordination based on model chosen
- Assess each coordination opportunity based on specific criteria
- Identify issues that may arise for each potential coordination application.
- Review the challenges of coordination and identify solutions and any implementation risks
- Identify the costs of coordination of services and compare to the costs of staying with the status quo

Step 5

Assess Applications
for Coordination
Against Potential
Coordination
Models

Step 5 - Applications for Coordination

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

✓✓ = Required;
✓ = Optional;
N/A = Not Applicable

Step 5
Assess Applications
for Coordination
Against Potential
Coordination
Models

Step 5 Sample Assessment Method

Marketing / Awareness – Assessment Methodology

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

Step 6Select a Preferred
Coordination Model

Step 6 Process and Activities

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

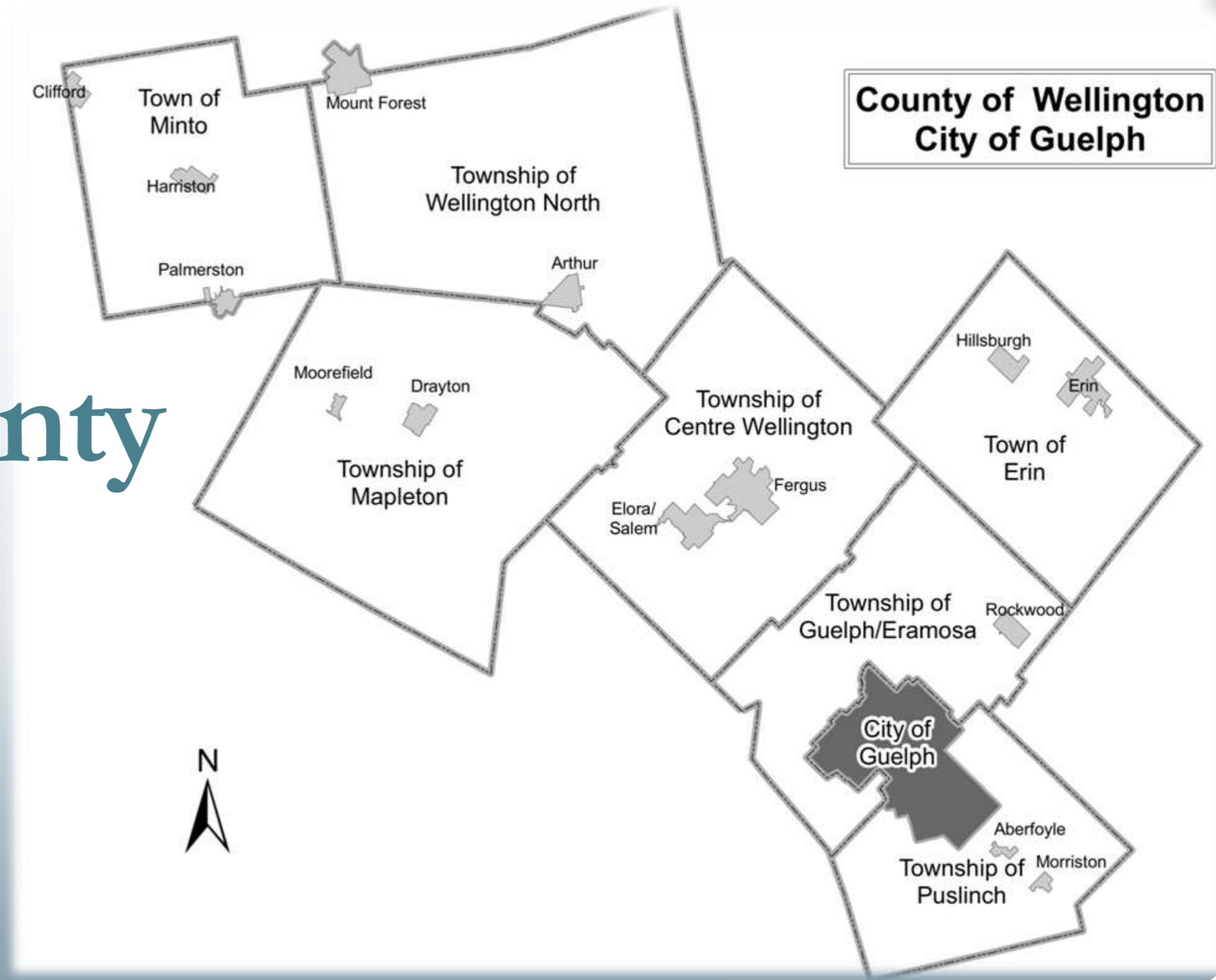
Step 6 Select a Preferred
Coordination Model

Step 6

Secure Funding

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

Wellington County

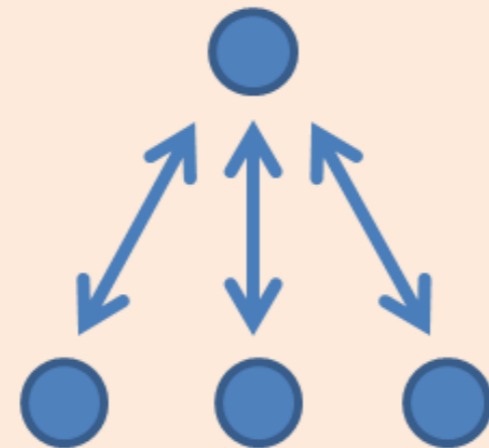


Step 4

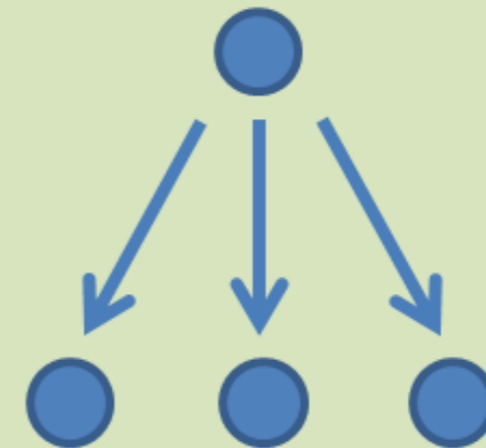
Assess Different
Coordination
Models

Step 4 Recommended Model

**Model 3:
Brokerage –
Confirmation Based**



**Model 2:
Brokerage – Central
Coordination**



Step 5

Assess Applications
for Coordination
Against Potential
Coordination
Models

Step 6

Select a Preferred
Coordination Model

Preliminary Recommendations

- 1. Form a Partnership:** Begin collaboration on policies and procedures, information sharing, etc.
- 2. Pursue Sustainable Funding to Grow:** Approach County to participate in Provincial Gas Tax Funding – Supports need to expand resources
- 3. Develop a Centralized Scheduling/Dispatch Office:** Explore the potential to purchase a scheduling software program based on gas tax funding achieved.
- 4. Develop a Central Brand and Communications Plan:** May need to obtain outside assistance to develop a brand.

Step 5

Assess Applications
for Coordination
Against Potential
Coordination
Models

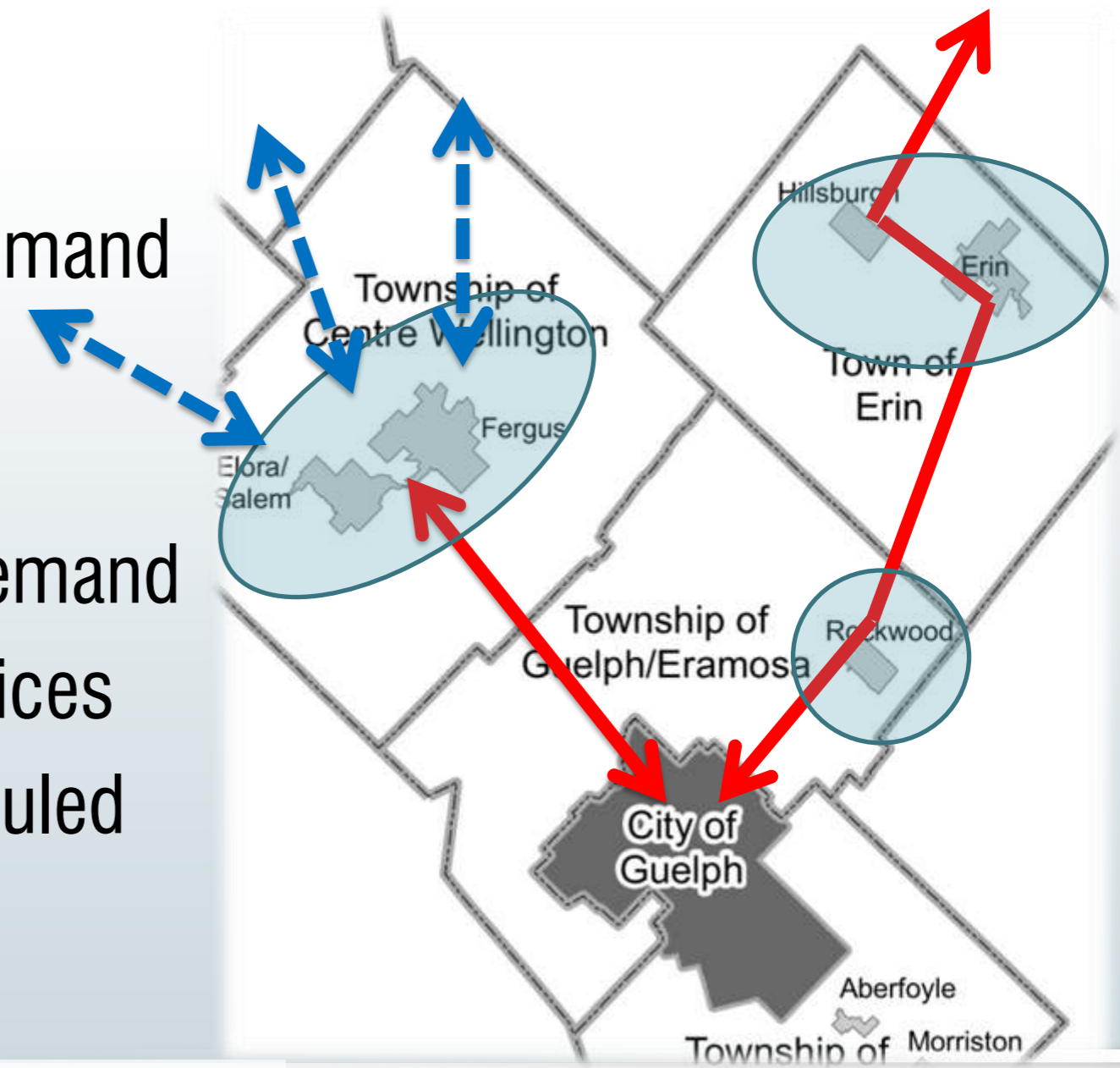
Step 6

Select a Preferred
Coordination Model

Preliminary Recommendations

5. Identify Corridor Services:

- Coordinate with private carriers to maximize demand
- Feed eligible demand responsive routes to the corridor at safe transfer points
- Operate flex routing in urban areas based on demand
- Open eligibility to all residents for corridor services
- Explore opportunity to extend number of scheduled fixed route runs



Step 5

Assess Applications for Coordination Against Potential Coordination Models

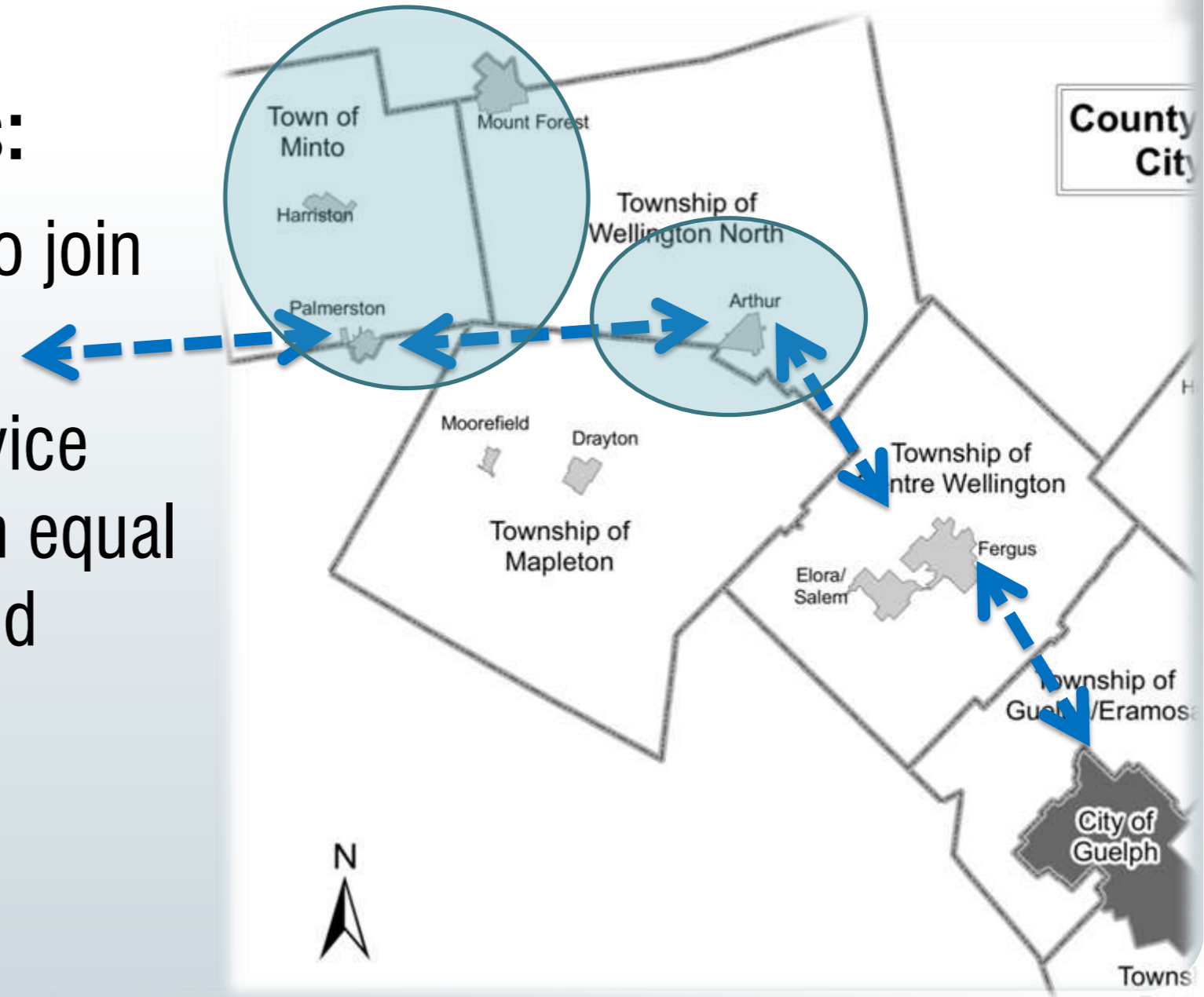
Step 6

Select a Preferred Coordination Model

Preliminary Recommendations

6. Explore Formation of Employee Shuttles:

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



Step 5

Assess Applications
for Coordination
Against Potential
Coordination
Models

Step 6

Select a Preferred
Coordination Model

Preliminary Recommendations

7. Identify “Purpose Specific” Services:

- Encourage more cost effective demand by scheduling “purpose specific” runs
- Tuesday No Frills run; Wednesday Stone Road Mall Service; Thursday Summer Rec service
- Work collaboratively to identify travel patterns
- Offer reduced fare than if travelling individually
- Open eligibility to these services



Step 5

Assess Applications
for Coordination
Against Potential
Coordination
Models

Step 6

Select a Preferred
Coordination Model

Preliminary Recommendations

8. Identify New Partners:

- Work with taxi industry to identify opportunity to deliver in-town services at a fixed / preferred rate. Done successfully in other regions in Ontario.

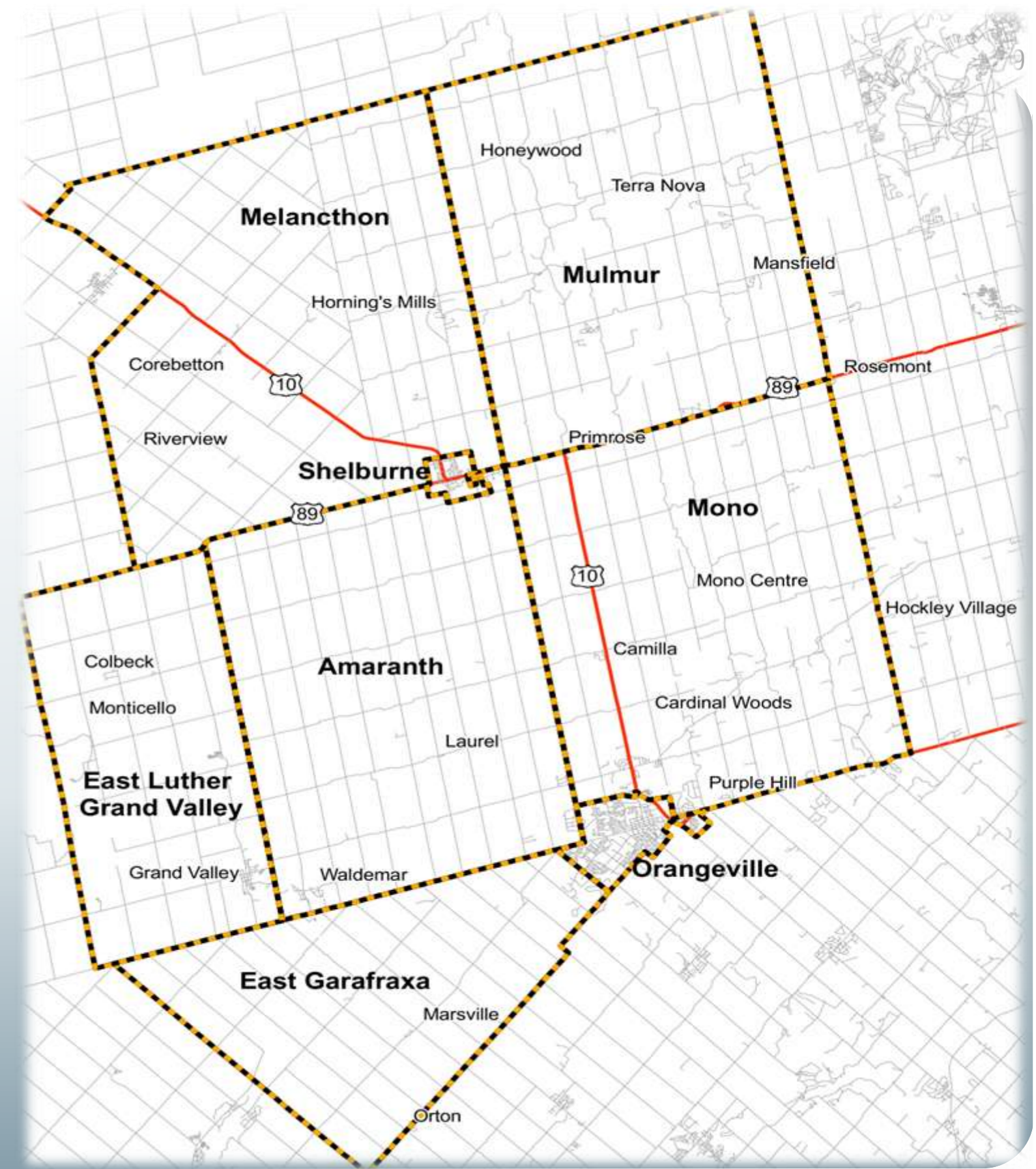


9. Partnership with Adjacent Transit Providers:

- Work with Guelph Transit to identify potential for fare and service integration with Guelph Transit



Dufferin County

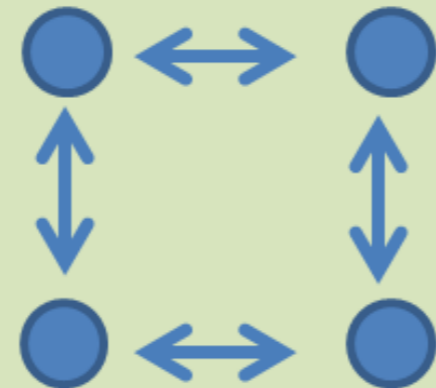


Step 4

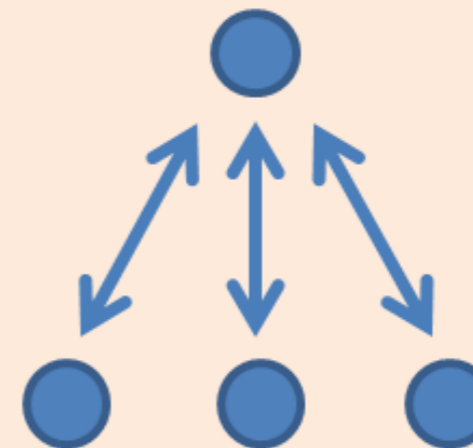
Assess Different
Coordination
Models

Step 4 Recommend Model

**Model 4:
Voluntary
Cooperation**



**Model 3:
Brokerage –
Confirmation Based**



Step 5

Assess Applications
for Coordination
Against Potential
Coordination
Models

Step 6

Select a Preferred
Coordination Model

Preliminary Recommendations

- 1. Form a Partnership:** Begin collaboration on policies and procedures, information sharing, etc.
- 2. Pursue Sustainable Funding to Grow:** Approach County to participate in Provincial Gas Tax Funding – Supports need to expand resources
- 3. Expand on Central Information Sharing:** Headwater Communities in Action has already developed a database, website and has done some marketing
- 4. Explore Potential for Central Phone Number:** Will improve awareness and the customer's ability to access information

Step 5

Assess Applications
for Coordination
Against Potential
Coordination
Models

Step 6

Select a Preferred
Coordination Model

Preliminary Recommendations

5. Identify “Purpose Specific” Opportunities for New Van:

- Work with partners to explore daily charter opportunities
- Find opportunities to manage demand for “non-priority” trips
- e.g. Tuesday shuttle to a Grocery Store in Shelburne; a Wednesday shuttle to the Orangeville Mall
- Seek potential funding support from retailers/facilities
- Market the program more aggressively
- Open the service to all members of the community to increase ridership and fare revenue



Step 5

Assess Applications
for Coordination
Against Potential
Coordination
Models

Step 6

Select a Preferred
Coordination Model

Preliminary Recommendations

6. Identify Integration Opportunities with Shelburne Commuter Service

- Increase level of coordination to identify potential service integration opportunities (move to Model 3)
- Explore potential for a mid-day run (could connect to the mid-day GO run and give community members additional service to the urban area)



Step 5

Assess Applications
for Coordination
Against Potential
Coordination
Models

Step 6

Select a Preferred
Coordination Model

Preliminary Recommendations

7. With funding, Identify Opportunities to Use Existing Resources such as the Early Years Centre Van:

- Part-time driver hired to provide service (new funding required)
- Agreement with Early Years that trips to their programs take priority
- Van use for local trips when not being used for Early Years trip
- Early Years program manager no longer needs to drive vehicle

Ontario Early Years Centres



A Place For Parents And Their Children.

Final Thoughts...

- **Operating transportation services in rural environments will continue to be a challenge**
- **Sustainable funding is critical to success, but will only go so far**
- **Need to make better use of existing resources by working together**
- **Various different coordination models have demonstrated success, and the framework will be unique to each community**
- **Moving forward can be a long and challenging process, buy-in necessary to improve the quality of life in our rural communities**



Financial Feasibility Assessment of Cost-Shared Transportation Model(s)

Questions?

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