Community Transportation Pilot Grant Program Overview AND Coordinated Rural Transportation Solutions

December 4, 2014 • 1:00 – 2:30 p.m.

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Community Transportation Pilot Grant Program
Ontario Healthy Communities Coalition Webinar

December 4, 2014

Ministry of Transportation Transit Policy Branch
<table>
<thead>
<tr>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview of Grant Program</td>
</tr>
<tr>
<td>Program Eligibility</td>
</tr>
<tr>
<td>Application and Evaluation Process</td>
</tr>
<tr>
<td>Guidelines and Application Form</td>
</tr>
<tr>
<td>Program Timelines</td>
</tr>
</tbody>
</table>
On March 26, 2014, Ministry of Transportation participated in an OHCC and ROI webinar on Accelerating Rural Transportation Solutions Series to introduce Community Transportation Pilot Grant Program.

The Program was announced November 25, 2014.

All municipalities invited to apply with participation of at least one community organization.
The Program’s aim is to provide financial assistance to Ontario municipalities for the development and implementation of community transportation initiatives. This is an opportunity for the Ministry to explore the effectiveness of different models of coordinating community transportation as a means to addressing transportation challenges.

The Program will test and measure the local demand for, and impacts of, targeted provincial funding of community transportation coordination initiatives among municipalities and their respective health and community agencies, transit providers and owners of underutilized transportation assets (e.g., school bus operators).

The Program will be application-based. Interested municipalities will be required to propose a community transportation project that includes the participation of one or more community organizations.
The Program will provide a total of $1 million over two years. The maximum individual grant is $100,000.

The Program will fund projects for up to two years (until March 31, 2017), after which projects will be evaluated to determine the effectiveness of coordinated community transportation as a service delivery model.

A community transportation project may utilize grant funds to do one or more of the following coordination activities:

- Public information/referral;
- Joint acquisition/sharing of supplies and services;
- Sharing of excess capacity;
- Joint use of resources; and
- Centralized coordination or dispatching, including technology procurement.
Eligible Applicants

☐ Only incorporated municipalities can apply for funding. Municipalities may be lower-tier or upper-tier.

☐ Proposed community transportation projects must include the participation of at least one community organization or local transportation provider, such as:
  - Social service agencies;
  - Health service agencies;
  - Seniors’ organizations;
  - Registered charitable organizations;
  - School bus operators; and/or
  - Public transit systems of another municipality

☐ Other eligibility requirements include:
  - At least one community organization participating in a project must provide transportation services;
  - Private transportation providers may also participate; and
  - Benefits of coordinated community transportation service must go toward community transportation service improvements to the community.
Eligible Projects

- The Program will fund pilot projects that implement new coordinated service or enhances existing coordinated service to increase capacity or improve service.

- Municipalities and their participating community organization(s) have flexibility to propose level of coordination, and what and how transportation assets are shared.

- Funded projects should result in measurable service improvements, such as increased number of rides, number and types of passengers served, and expanded service areas.

- Community transportation programs may serve more than one municipality (i.e., provide county-wide, inter-city or shuttle service).

- Coordinated service must be in place within one year of the award of the grant and must operate to the end of the pilot period.
Examples of Eligible Projects

- **Referral Service**
  Municipality partners with 1 or more community organizations to put in place one point of access through:
  - Toll-free 1 800 number to answer to calls for transportation information or ride requests directed to participating community organizations, and/or
  - Integrated website

- **Centralizing Functions**
  Municipality partners with existing coordinated community transportation service provided by social and health agencies to expand service area and improve access:
  - Implements new common scheduling and dispatch software to improve ride booking and scheduling; or
  - Implements automated vehicle location technology to improve wait times, travel times, and route planning.

- **Collaboration with Other Public Transit Agencies**
  Municipality partners with another municipal public transit agency to coordinate their services to provide new inter-municipal, regional or inter-regional service.
Application Process and Selection

- Applicants will be required to submit an application package providing the following:
  - Description of the Community Transportation Project and participating community organizations;
  - Project Work Plan;
  - Project Budget; and
  - Proposed service level improvements.

- Applications will be reviewed and evaluated based on:
  - Project proposal meeting program objectives;
  - Project implementation (organizational capacity, realistic work plan);
  - Project budget (efficient use of resources); and
  - Pilot evaluation (ability to monitor and report on service outcomes).

  Selection will also be based on achieving variety of projects and geographies.
Grant Funding

- Grant funds cannot be used to replace existing funding. Funding must be for the start up of new initiatives or incremental to existing funding.

- Neither municipalities nor community organizations will be required to contribute funding. Only one project per municipality will be funded.

- Individual grant funding will be based on the proposed project and the project budget submitted, but cannot exceed $100,000. Funding from other sources are permitted but must be identified in the project budget.

- Examples of Eligible Expenditures:
  - Salary of a coordinator for planning and implementing coordinated service;
  - Consultant services to assist in implementation (e.g., scheduling software, automated vehicle location technology);
  - Contracting transportation services from local providers that is part of proposed project (taxi service to augment coordinated service, dispatch service); and
  - Training, communications or promotion of coordinated service.
Grant Funding

- Successful municipalities will be required to enter into a Transfer Payment Agreement with MTO, requiring:
  - Copies of municipal by-law(s) authorizing execution of the Agreement and designating the signing officer. By-law(s) are not required at the application stage.

- Municipalities will be responsible and accountable for grants.

- Grant recipients will be required to report on project outcomes at the end of the pilot period to assist in program evaluation:
  - Levels of transportation services prior to the Community Transportation Project;
  - Service levels achieved by coordinated service;
  - Lessons learned; and
  - Community feedback.
Application Guidelines and Requirements 2014-2015 now available online: 
http://www.mto.gov.on.ca/english/transit/community-transportation-grant-program.shtml

- Eligibility requirements
- Eligible expenditures
- How to apply
- Evaluation criteria and weighting
- Payment of Funds
- Reporting requirements

Ministry of Transportation, Transit Policy Branch
Application Guidelines and Requirements [display pdf file]
Application Form available online at http://www.mto.gov.on.ca/english/transit/community-transportation-grant-program.shtml

- Multiple-choice questions to identify community partnership and type of community transportation project.
- Questions on project proposal, project planning, project budgets, project outcomes.

- Additional documents can be added to application.
- Completed applications can be submitted by email.
## Program Timelines

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>January 30, 2015</td>
<td>Application deadline</td>
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<tr>
<td>February 2015</td>
<td>Application evaluation and selection</td>
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<tr>
<td>February – March 2015</td>
<td>Notifications to applicants</td>
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<td>March 2015</td>
<td>Transfer Payment Agreements (TPA) signed</td>
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<td>April 2015</td>
<td>Projects Begin</td>
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<tr>
<td>Within one year of effective date of Agreement</td>
<td>Coordinated service implemented and operational</td>
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<tr>
<td>March 31, 2017</td>
<td>Grant Program ends, final reports due</td>
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TOWARDS COORDINATED TRANSPORTATION:
A Resource Document

HC Link Webinar
Dennis Kar, Dillon Consulting Limited
dkar@dillon.ca

December 4th, 2014
Study Purpose

- Illustrate different coordinated transportation models
- Outline challenges and potential solutions
- Develop a framework to identify and assess coordination opportunities
- Demonstrate the methodology on three regions
- Report Link: http://www.ruralontarioinstitute.ca/file.aspx?id=b5980041-d1ce-4618-b742-1d62c39208f1
When two or more organizations interact to jointly accomplish their transportation objectives - Involves better resource management, in which improved organizational strategies are applied to achieve greater cost-effectiveness in service delivery - Involves shared responsibility, shared management, and shared funding - Requires TRUST
Objectives of Coordination

• Improve transportation system performance by:
  – Stretching scarce resources through better resource management
  – Freeing local agency staff to do other work
  – Reducing client confusion over who to 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 2: Inventory Existing Transportation Services and Key Stakeholders

Step 3: Identify Service Demand and Gaps / Implementation Issues and Opportunities

Step 4: Assess Different Coordination Models

Step 5: Assess Applications for Coordination Against Potential Coordination Models

Step 6: Select a Preferred Coordination Model
Step 1 - Partnership Process and Activities

- Identify two or more organizations that share a common goal
Step 1 - Partnership Process and Activities

• Work with agencies and funding partners to identify the potential to pool resources towards a common goal

• Identify a lead organization or champion

• Develop a vision for success, including goals and objectives

• Develop a partnership commitment (memorandum of understanding)

• Meet at least monthly, until partnership has been fully assessed
Step 2 - Inventory Process and Activities

• Develop a inventory of existing transportation providers and key stakeholders (web-search, online, mail or telephone surveys, follow-up questions)
• Understand resources, legislative requirements, funding sources, eligibility criteria, desire to participate in a partnership
Step 3 – Assess Demand & Gaps

- 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

Census Data
Resident or Client Surveys
Travel Logs / Data

Strongly Agree
Agree
Somewhat
Somewhat
Disagree
Strongly Disagree
Step 3 – Assess Demand & Gaps

Potential Gaps

- Temporal availability
- Geographic availability
- Capacity issues
- Accessibility
- Eligibility
- Trip purpose
- Affordability
- Ease of understanding and navigation
Step 3 – Assess Demand & Gaps Process and Activities

• Identify potential implementation issues and opportunities
• Determine potential areas where coordination may help to resolve the service gap versus areas where expansion of existing resources is required
Step 3 – Assess Demand & Gaps Implementation Issues

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

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

- Hold an evaluation session with representatives from each organization to discuss, evaluate and decide on the level of coordination desired.
- Each partner should outline their desired level of independence within the coordinated framework.
- Assess the advantages and disadvantages of each level of coordination.
- Focus on one or two models that the group is comfortable with.
Step 4 – Model Selection Models to Consider

1. Model 1: Centralized Control
2. Model 2: Brokerage - Central Coordination
3. Model 3: Brokerage - Confirmation Based
4. Model 4: Voluntary Cooperation Model
• 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
Step 4 – Model Selection

Model 2

- One lead organization plans and schedules all transportation services and trips
- Partner organizations retain ownership of their vehicles and resources
- Coordinated trips are made by the lead partner and delivered by each partner agency
• 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
• All partner organizations retain ownership of vehicles and services, but work together to improve policies and processes
• Potentially provide a central transportation information service and cooperate on specific initiatives
• Each partner organization continues to operate independently but understands what others are doing
Step 5 – Process and Procedures

Process and Activities

• Discuss, evaluate and decide on the potential applications for coordination based on model chosen
• Assess each coordination opportunity based on specific criteria
• Identify issues that may arise for each potential coordination application
• Review the challenges of coordination and identify solutions and any implementation risks
• Identify the costs of coordination of services and compare to the costs of staying with the status quo
### Step 5 – Process and Procedures Applications for Coordination

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

**Legend:**
- 1 = Required;
- 2 = Preferred;
- 3 = Optional;
- N/A = Not Applicable
### Step 5 – Process and Procedures

**Sample Assessment Methodology**

<table>
<thead>
<tr>
<th>Steps in the Process</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Assess the visibility of the coordinated framework for existing and new clients/customers</td>
<td>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.</td>
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<tr>
<td>2. Review existing marketing/communications budgets to determine potential to pool resources</td>
<td>Review how budgets are currently being spent. Assess whether there is a benefit to consolidate and better communicate the objectives of the transportation service.</td>
</tr>
<tr>
<td>3. Develop potential brand that reflects entire community and seek sponsorship opportunities</td>
<td>Having a recognizable community-wide brand may encourage various retailers, local businesses and service clubs to financially support the overall objectives of the partnership.</td>
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</tbody>
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Step 6 - Implementation Process and Activities

• Select a model and formalize agreement with participating partners
• Confirm the mission statement and vision for the partnership
• Develop a service plan on how the structure will be organized and implemented
• Approach partners to secure funding
• Develop an action plan with deliverables and key milestones
• Establish a monitoring plan to measure results against the goals
• Report back to funding agencies
Step 6 - Implementation 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
Performance Measures are important to assess the outcome of the coordinated partnership.

Effective Performance Measures and Targets are...
- Tied to goals and objectives
- Challenging yet achievable
- Quantifiable based on available resources
- Explained as a ratio against another variable (e.g. rides per service hour)

Monitoring Plan should start with baseline data and collected at regular intervals.
Potential Coordination Opportunities
• Develop central office for booking, scheduling and dispatching trips
• Identify opportunities for shared rides between transportation providers
• May involve capital purchase of scheduling / dispatch software
• Software cost depends on vehicles and trips, however, inexpensive solutions on the market
Develop central resource for customers to call about transportation service

One website and customer service number that refers customers to the appropriate transportation service (based on their eligibility and need)

Reduces client confusion about who to call and enhances accessibility to transportation
Based on demand, identify potential corridor service linking to major destinations to maximize vehicle occupancy

Feed eligible demand responsive routes to the corridor at safe transfer points

Operate flex routing in urban areas based on demand

Open eligibility to all residents for corridor services
• Identify opportunity for major employers to join the partnership
• Work with employers to design service and establish funding agreement based on contribution from employer, employees and municipal subsidy
• Coordinate use of vehicles with demand responsive services and corridor services
• Establish a coordinator to work with medical professionals to more effectively schedule non-emergency appointments for long-distance trips
• Can help increase vehicle occupancy and free up resources to take on more trips
• May involve good working relationship with your LHIN and local doctors’ offices
• Encourage more cost effective trip making by scheduling “purpose specific” runs
• Tuesday No Frills run; Thursday Summer Rec service
• Work collaboratively to identify travel patterns
• Work with retailers to establish incentives (e.g. $10 off grocery bill)
• Open eligibility to these services
Final Thoughts...

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

Questions?

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- Plan and evaluate your program
- Build and expand your network
- Develop policy
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