

# TOWN OF HALTON HILLS SPECIALIZED TRANSIT PLAN

MID-TERM DIRECTIONS REPORT



Submitted by Left Turn Right Turn

September 3, 2020



# TABLE OF CONTENTS

<b>EXECUTIVE SUMMARY</b>	<b>I</b>
Key Findings	i
Service Delivery Recommendations	ii
AODA Compliance and Service Design Recommendations	iii
2021 Budget Impact	v
Next Steps	v
<b>1 INTRODUCTION</b>	<b>1</b>
<b>2 BACKGROUND</b>	<b>2</b>
2.1 Project Understanding	2
2.2 Review of Plans and Studies	3
2.2.1 Transit Service Strategy (2019)	3
2.2.2 Town of Halton Hills Transportation Master Plan (2011)	4
2.2.3 Town of Halton Hills Official Plan (2008)	4
2.2.4 Vision Georgetown-Guiding Principles (2014)	4
2.2.5 Mayor's Community Energy Strategy (2015)	5
2.2.6 Halton Hills Strategic Action Plan (2014-2018)	5
2.2.7 Metrolinx – The Big Move (2008)	5
2.2.8 The Road to Change- Halton Region Transportation Master Plan (2011)	6
2.2.9 Mobility Management Strategy for Halton (2016)	6
2.2.10 Corporate Fleet Management Strategy (2019)	7
2.2.11 Halton Hills ActiVan Master Plan (2014)	7
2.2.12 Town of Halton Hills Strategic Plan (2020)	7
2.2.13 Corporate Asset Management Policy (2018)	8
2.2.14 Asset Management Plan (2014)	9
2.2.15 Halton Region Official Plan (2018)	9
Town of Halton Hills Mid-term Directions Report	i

	2.2.16 Milton Transit Services Review and Master Plan Update (2019)	9
	2.2.17 Metrolinx GO Rail Station Access Plan (2016)	9
<b>3</b>	<b>CURRENT STATE ASSESSMENT</b>	<b>10</b>
3.1	Methodology	10
3.1.1	<i>Data and Documentation Review</i>	11
3.1.2	<i>Stakeholder Meetings and Discovery Interviews</i>	12
3.2	Key Findings	12
3.2.1	<i>Excellent Customer Service</i>	12
3.2.2	<i>Efficient Operational Processes</i>	12
3.2.3	<i>Focus on Net Zero Commitment</i>	13
3.2.4	<i>Service Delivery</i>	13
3.2.5	<i>Preparing for Universal Access</i>	13
3.2.6	<i>Alignment with the AODA</i>	13
<b>4</b>	<b>SERVICE DELIVERY MODEL ASSESSMENT</b>	<b>14</b>
4.1	Service Delivery Options	15
4.2	Quantitative Evaluation Framework	16
4.3	Analysis	18
4.3.1	<i>Criteria 1 – Ease of implementation</i>	18
4.3.2	<i>Criteria 2 - Potential cost savings and efficiencies</i>	19
4.3.3	<i>Criteria 3 - Customer satisfaction</i>	21
4.3.4	<i>Criteria 4 - Minimizing operational and organizational interfaces</i>	22
4.3.5	<i>Criteria 5 - Flexibility of service delivery</i>	23
4.3.6	<i>Criteria 6 - Innovation and modernization</i>	24
4.3.7	<i>Evaluation Result</i>	25
4.4	Recommendation	26
<b>5</b>	<b>AODA COMPLIANCE ASSESSMENT</b>	<b>27</b>
5.1	Summary of Challenges and Analysis	27

5.1.1	<i>Eligibility Processes</i>	27
5.1.2	<i>Service Design and Operational Practices</i>	28
5.2	Recommendations	29
5.2.1	<i>Eligibility Process Improvement Recommendations</i>	29
5.2.2	<i>Service Design and Operational Practices</i>	32
<b>6</b>	<b><u>2021 BUDGET IMPACT SUMMARY</u></b>	<b>38</b>
<b>7</b>	<b><u>SUMMARY AND NEXT STEPS</u></b>	<b>40</b>
	<b><u>APPENDIX 1- STAFF AND STAKEHOLDER ENGAGEMENT</u></b>	<b>41</b>
	<b><u>APPENDIX 2 – IMAGE SOURCES</u></b>	<b>43</b>

# EXECUTIVE SUMMARY



Town staff and ActiVan vehicle (2)



ActiVan vehicles (3)

In 1981, the Town of Halton Hills began providing specialized transit services (ActiVan) for eligible customers with disabilities. Almost 40 years later, with a fleet of eight vehicles, ActiVan has grown into an essential service for many Halton Hills residents including seniors aged 65 and older and continues its pursuit of providing high quality customer service and operational efficiency.

Left Turn Right Turn (LTRT) was retained by the Town of Halton Hills to develop a Specialized Transit Plan for ActiVan. The planning approach focuses on short-term (Phase 1) and long-term (Phase 2) recommendations. This Mid-term Directions Report presents the short-term recommendations. It evaluates service delivery model alternatives and identifies opportunities to address AODA gaps and service improvements to inform the 2021 budget. In Phase 2, LTRT will look at service beyond the 2021 budget year and will develop service standards, forecast ridership to 2031, explore potential funding sources and develop recommendations to improve service efficiency and quality.

## KEY FINDINGS

Phase 1 began with a current state assessment to evaluate current procedures, practices and services. The remote discovery session findings showed that ActiVan staff are dedicated to providing high quality customer service and are enthusiastic about making required changes to improve efficiency and customer experience. Staff were very cooperative in helping to identify current challenges and areas of improvement. Key findings were derived from the current state assessment and informed the recommendations of the plan. These findings are summarized in Figure 1 below.



ActiVan drivers (4)

Figure 1 - Summary of key findings

**Excellent Customer Service**

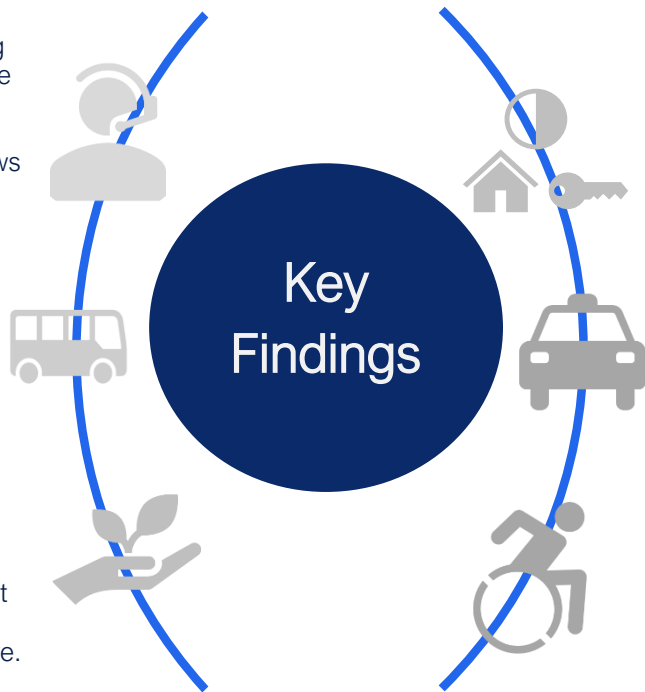
ActiVan staff are dedicated to providing high quality and timely customer service and are eager to make improvements. ActiVan has positive and engaged interactions with its customers and views this relationship as a top priority.

**Efficient Operational Process**

ActiVan has been applying best practices in establishing processes to ensure efficient operations. No-show rates are low and scheduling processes are effective.

**Focus on Net Zero Commitment**

Sustainability is one of Halton Hills' top priorities. ActiVan is dedicated to its net zero commitment and is resolved to transition to an electric fleet in the future.



**Service Delivery**

The current model with in-house operations has been working well for ActiVan in many ways. However, in anticipation of future growth and increased costs, new options must be evaluated to ensure the best model is being utilized.

**Preparing for Universal Access**

The introduction of Universal Access Service will impact ActiVan's service. Eligibility and operational policies and processes must be updated to ensure the services are integrated and compliant with the AODA.

**Misalignment with the AODA**

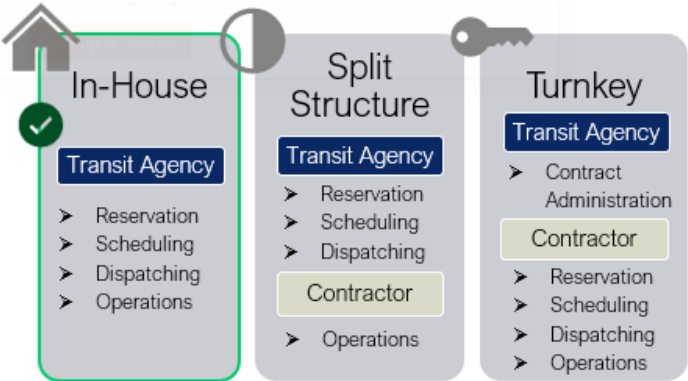
ActiVan's current policies and processes are mostly aligned with the AODA. However, there are eligibility and service design changes that ActiVan should implement to better align with the AODA, increase efficiencies and enhance customer experience.

SERVICE DELIVERY RECOMMENDATIONS

One of the key objectives of this report is the analysis of service delivery model options leading to a final recommendation for ActiVan to utilize moving forward. Three relevant models were considered for Halton Hills: in-house, split structure and turnkey. The three models vary in terms of the level responsibility that a transit agency provides in service provision as summarized in the adjacent figure.

To provide rigor and aid in the selection of a recommended model, a quantitative evaluation framework was developed to assess the models. The framework is structured around six key weighted determinants of evaluation of which the options are scored against. This provides a quantitative service delivery model value to the Town of Halton Hills. The six evaluative factors are: ease of implementation, potential cost savings and efficiencies, customer satisfaction, minimizing operational and organizational interfaces, flexibility of service delivery, and innovation and modernization. These factors were developed, weighted, and scored according to an analysis of service model decision making in comparable communities, a literature review of service delivery models, professional expertise and a consideration of local factors partially supplemented by Town staff.

Figure 2 - Summary of service delivery models



The results of the qualitative and quantitative analysis indicate that ActiVan should pursue **an in-house service delivery model**. The analysis results are shown in Figure 3 below.

Figure 3 – Service delivery model analysis results

Evaluation Criteria	In-house				Split service			Turnkey		
	Weight	Score	Points	Weighted score	Score	Points	Weighted score	Score	Points	Weighted score
Ease of Implementation	15%	Medium	2	0.3	High	3	0.45	Low	1	0.15
Potential cost savings and efficiencies	20%	Low	1	0.2	Medium	2	0.4	High	3	0.6
Customer Satisfaction	30%	High	3	0.9	Medium	2	0.6	Low	1	0.3
Minimizing operational and organizational interfaces	10%	High	3	0.3	Medium	2	0.2	Low	1	0.1
Flexibility of service delivery	15%	High	3	0.45	Medium	2	0.3	High	3	0.45
Innovation and modernization	10%	Medium	2	0.2	Medium	2	0.2	Medium	2	0.2
Total Weighted Score				2.35			2.15			1.8

The in-house model proves an excellent choice in minimizing organizational interfaces, enabling service delivery flexibility and most importantly maximizing customer satisfaction. Due to the customer centric nature of specialized transit and its role as an essential service, customer satisfaction is weighted higher than other criteria. While an in-house model does not score high in terms of cost-efficiency, the higher level of service it does provide to transit customers and the community alike, in conjunction with its resiliency and sustainability make it the most attractive option.

## AODA COMPLIANCE AND SERVICE DESIGN RECOMMENDATIONS



Customer boarding ActiVan vehicle <sup>(5)</sup>

ActiVan's current policies and processes with respect to eligibility and operations are generally aligned with the Accessibility for Ontarians with Disabilities Act (AODA). However there are a few areas in which ActiVan can better align with the AODA in the short-term and after Universal Access Service is implemented. These areas include eligibility processes, transfer connections, and operational practices. Section 5 of this report details the current AODA-related gaps and proposes recommendations to address them. Key gaps discussed include the lack of an appeals process, the challenges of transfer

connections with neighboring municipalities, misalignment of booking policies with the AODA, and overall inefficiencies in the scheduling process.

Recommendations to bridge AODA gaps include aligning terminology with regards to eligibility conditions and establishing an appeals process. Following industry best practices, an appeals panel should be formed consisting of persons with lived experience, including both persons with a variety of disabilities and also professionals working to support individuals with disabilities. It is also recommended that ActiVan update its application form to include reference to all disabilities rather than solely focusing on the physical disabilities and should be in close alignment with the application forms of other specialized transit providers in Halton Region.

Recommendations to enhance service design and operational practices to better align with the AODA and increase efficiencies include enhancing transfer locations, updating booking policies and scheduling processes. It is recommended that ActiVan work with neighboring municipalities to establish better inter-municipal connections. A total of five locations have been identified in this report for ActiVan to consider implementing to enhance transfer connections. With respect to operational practices, it is recommended that the minimum notice for reservation be reduced from 48 hours to three hours to ensure compliance with the AODA. In order to implement this change, it is recommended that ActiVan introduce weekend capacity to accept and schedule bookings.

Additional recommendations that can be implemented together with the above recommendations to increase efficiencies include reducing the booking window from 30 days to seven days and scheduling the night before. Figure 4 below outlines all AODA related recommendations described above.

Figure 4 - Overview of recommendations

#### Overview of AODA Compliance and Service Design Recommendations

##### Update Eligibility Categories

2. Update 'permanent' eligibility category name to state 'unconditional eligibility'

##### 3. Establish an independent appeals process

##### Update Eligibility Application for Persons with Disabilities

4. Create new eligibility application form for persons with disabilities
5. Update application form for seniors

##### Enhance Transfer Connections

6. Begin discussion with Ride Well in Wellington County to facilitate transfers and establish a transfer point
7. Establish new transfer points at the Lisgar GO Station, Regional Road 25/Highway 401 GO bus stop, and Milton Crossroads at Walmart bus stop.
8. Create website content on inter-regional transfer information
9. Schedule transfer trips to conventional services based on their departure time information

##### Update Booking Policy and Processes

10. Introduce weekend capacity to accept bookings, schedule trips and respond to customer inquiries and schedule the night before instead of morning before
11. Reduce current booking window from 30 days to seven days and accept trips up to 3 hours before end of service day

## 2021 BUDGET IMPACT

Figure 5 below illustrates the recommendations with monetary impact to the 2021 budget. Several recommendations do not have a monetary budget impact since staff time is the only requirement for implementation. The range of costs provided for the following reflect industry standards.

Figure 5 - Estimates of 2021 budget impact

Service Delivery Model		Recommendations with budget impact
<b>Recommendation 1:</b> Implement an in-house service delivery model by transitioning contracted drivers to Town employment.		<ul style="list-style-type: none"> <li>• \$47,000 yearly increase in operator labour expenses</li> </ul>
AODA Compliance and Service Design		
<b>Recommendation 3:</b> Establish an independent appeals process by recruiting a three-member appeals panel.		<ul style="list-style-type: none"> <li>• \$600 to pay for honorariums per year</li> </ul>
<b>Recommendation 8:</b> Create website content on inter-regional transfer information		<ul style="list-style-type: none"> <li>• \$2500 for Communications staff effort</li> </ul>
<b>Recommendation 10:</b> Introduce evening and weekend capacity to accept bookings, schedule trips and handle customer inquiries.		<ul style="list-style-type: none"> <li>• \$65,000 per year in wages for a pool of part-time dispatchers</li> </ul>
<b>Recommendation 11:</b> Reduce advanced booking notice policy from 30 days to 7 days and accept trip requests up to 3 hours before end of service day.		<ul style="list-style-type: none"> <li>• \$2500 for Communications staff effort</li> </ul>

## NEXT STEPS

The Mid-Term Directions Report will be presented to Town council for approval in September 2020. Upon final feedback from Town staff, the project team will make any amendments to the report and begin work on Phase 2 of the Specialized Transit Plan. Phase 2 will commence with the development of service standards. This will include significant public and stakeholder consultation that will be held throughout the fall to gather input to the recommended standards developed in cooperation with Town staff. Other key components in the development of the long-term plan include ridership forecasting and service analysis. These processes will culminate in a Final Directions Report in April 2021.

# 1 INTRODUCTION

Specialized service in Ontario has undergone significant transformation over the past five years. The Accessibility for Ontarians with Disabilities Act (AODA) Integrated Accessibility Standards Regulation (IASR) phased in expanded eligibility requirements in 2017; this, coupled with an aging population, led to increased demand for specialized transit services prior to the covid-19 pandemic.

For the Town of Halton Hills' ActiVan, this period has been particularly dynamic due to market influences and the town's plans to develop a conventional transit service. In 2018, the Town's long-time partner and contractor operating ActiVan discontinued operations, necessitating a rapid move to bring the service in-house.

The introduction of conventional transit, as captured in the town's Transit Service Strategy, will have further implications for specialized transit demand, eligibility and presents opportunities for consolidation and integration with ActiVan. As a result, a comprehensive Specialized Transit Plan for the town is required. To do so, the Town of Halton Hills has retained Left Turn Right Turn (LTRT) to develop a Specialized Transit Plan to support the Town in its innovative and transformative journey to enhance mobility in Halton Hills.

The planning approach focuses on short-term (Phase 1) and long-term (Phase 2) recommendations. This Mid-term Directions report is the short-term plan and summarizes the findings of the current state assessment and makes recommendations that will affect the 2021 operating budget. Analysis and recommendations solely focus on the evaluation of service delivery model options and review of eligibility and operations as it relates to AODA requirements. The report reviews the decision to bring operations in-house and recommends a service delivery model to be used going forward (Section 4). The report also details recommendations to address AODA gaps and identifies related quick wins to improve eligibility processes and operational efficiencies (Section 5).

In Phase 2, LTRT will look at service beyond the 2021 budget year and will develop service standards, forecast ridership to 2031, explore potential funding sources and develop recommendations to improve service efficiency and quality.

## 2 BACKGROUND

### 2.1 PROJECT UNDERSTANDING

The Town of Halton Hills is located within the Regional Municipality of Halton, in the northwestern end of the Greater Toronto Area. Serving a population of 61,000 residents, the Town has a total of 2,439 active registrants for ActiVan, its specialized transit service. ActiVan provides an accessible transportation service, in alignment with the Accessibility for Ontarians with Disabilities Act (AODA), for persons with disabilities and seniors aged 65 and older. ActiVan operates both dedicated and contracted taxi service on weekdays from 7:00 AM to 11:00 PM and schedules its contracted taxis for use on evenings and weekends.

The dedicated service was contracted to Tyler Transport Limited from the ActiVan program's inception in 1981 to July 1, 2018, when the contractor ceased all operations. The operational support provided by Tyler Transport and the relationship between its operators and the customers was viewed very favorably by the community. In order to ensure a seamless transition for customers when Tyler Transport ceased operations, Town staff recommended to Council to bring the operations of the dedicated service in-house in 2018 on temporary contracted basis. Council approved the recommendation with the direction to evaluate service costs of the program and provide a recommendation back to Council on the future operations of the service.

In 2019, the Town developed a Transit Service Strategy which evaluates the feasibility of introducing a conventional transit service to the Town of Halton Hills. The strategy aligns with Halton Region's Mobility Management Strategy and the Town's Strategic Action Plan. The strategy builds on existing ActiVan service and recommends a phased approach to meet the current and future mobility needs of the community. The phased approach calls for the implementation of a Universal Access Service (UAS) leading to the eventual introduction of a fixed route service to serve the residents of Halton Hills.

The Specialized Transit Plan is driven by the need to evaluate service delivery models and to prepare for the changes resulting from the implementation of the Universal Access Service. The Plan delivers on these needs in a holistic evaluation of ActiVan's services. The plan is composed of two component parts, a short-term and a long-term plan. The short-term plan recommends a service delivery model and identifies opportunities to address AODA gaps and make service improvements to inform the 2021 budget. The long-term plan looks at service beyond the 2021 budget year and will develop service standards, forecast ridership to 2031, explore potential funding sources and develop recommendations to improve service efficiency and quality.

## 2.2 REVIEW OF PLANS AND STUDIES

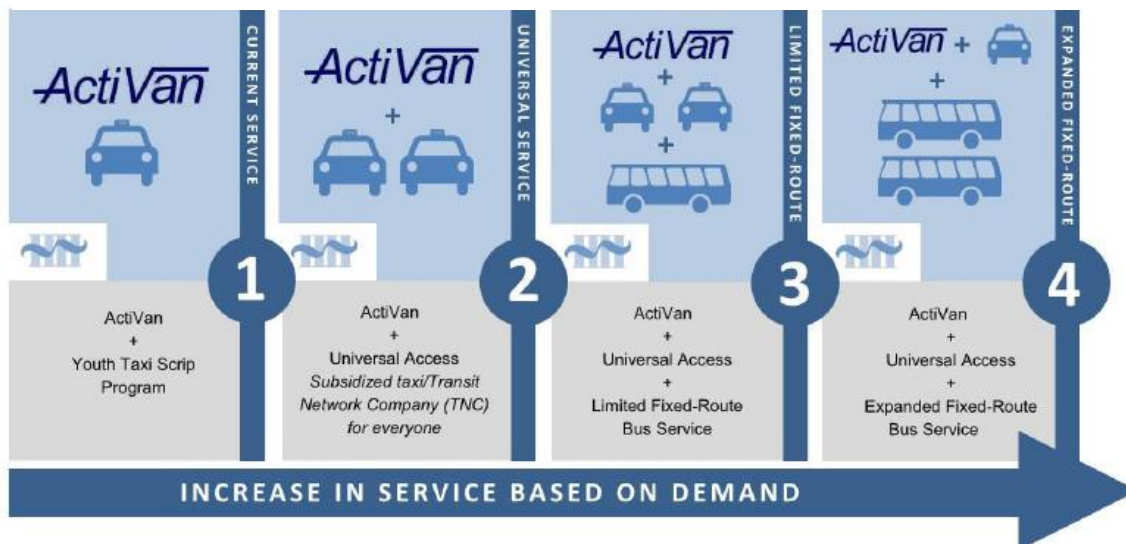
The recommendations contained within this report are intended to enhance ActiVan's service in the 2021 budget year and be consistent with the Transit Service Strategy, Strategic Action Plan and the long-term success of specialized transit service in Halton Hills.

To provide proper context to the plan, LTRT undertook a comprehensive review of previous related studies, summarized in the following sections.

### 2.2.1 TRANSIT SERVICE STRATEGY (2019)

The Transit Service Strategy evaluates the need for and feasibility of conventional transit service in the Town of Halton Hills. The Strategy builds on existing ActiVan specialized transit service and Regional GO Transit services and recommends a phased approach to meet the current and future mobility needs of the community. The strategy proposes four levels of service improvements with progression based on demand. Level one represents the current service with ActiVan and the TaxiScrip program and each subsequent level builds off the previous one. Level two introduces the Universal Access Service (UAS) which provides subsidized taxi/Transit Network Company service for all residents, in addition to ActiVan and in replacement of TaxiScrip. Level three builds on level two and introduces a limited fixed-route bus service while level four expands the fixed route bus service with a larger coverage based on demand. The four levels are summarized in Figure 6 below.

Figure 6 - Summary of the proposed levels of transit service in the Town of Halton Hills.



The Strategy recommends the fare to be set at \$3.75 for both ActiVan and UAS with UAS customers paying \$1 for each additional kilometre over 10 kilometres. This will serve as input to the financial analysis in Phase 2, which supports the long-term recommendations of the Specialized Transit Plan.

The above, in addition to changes in demand, are direct inputs to the financial analysis to be conducted in the Specialized Transit Plan. The Transit Service Strategy also impacts the ridership forecast and recommendations to support future demand, service coverage and programs (i.e. travel training) that ActiVan should consider. Potential conventional transit locations include the following:

- Healthcare Services, e.g., medical centres/offices, hospitals
- Schools / Community Hubs, e.g., community centres, churches, and libraries

- Commercial areas, e.g., business parks and/or shopping centres
- Recreation, e.g., sport facilities, large parks, and conservation areas
- Existing transit connections
- Existing hubs (major nodes) of other nearby transit services
- Proposed developments, both commercial and residential

While the majority of these locations are within Halton Hills, others are outside of the Town's borders. The plan recommends that the UAS service area include all of Halton Hills and key destinations outside Halton Hills, specifically Lisgar, Milton, and Mount Pleasant GO stations. As such, ActiVan's service boundary will be reviewed in Phase 2 to ensure alignment with the planned UAS.

As Universal Access Service and fixed route services are implemented, ActiVan can explore adapting a Family of Services (FoS) model where a portion of a customer's journey is delivered by the Universal Access or fixed route service. This will be taken into consideration in Phase 2 of the Specialized Transit Plan where ridership forecasts will be conducted.

### 2.2.2 TOWN OF HALTON HILLS TRANSPORTATION MASTER PLAN (2011)

The Town of Halton Hills Transportation Master Plan (TMP) was developed to identify broad strategies to meet transportation challenges to the year 2031. The plan integrates municipal transportation planning with environmental assessment objectives and land use planning to identify transportation improvements. The primary purpose of the TMP is to guide the Town's transportation-related decision making and provide direction for its discussions and negotiations with other agencies and governments. The goals and objectives of the TMP are as follows:

- Address existing transportation challenges;
- Identify the policies, programs and investments required to support planned growth and development;
- Identify and evaluate opportunities to increase / encourage active transportation modes (including cycling and pedestrian facilities);
- Identify required infrastructure improvements; and
- Provide a transportation system that offers travel choices, encourages walking and cycling, and balances the needs of all users.

The TMP identifies the need to support long term inter-municipal transit services (connecting urban areas, employment areas, GO stations and mobility hubs). The plan also recommends that the Town maximize personal mobility choices by ensuring that individuals are aware of their travel options, understand how to use them, and are willing to do so.

### 2.2.3 TOWN OF HALTON HILLS OFFICIAL PLAN (2008)

The Town of Halton Hills Official Plan (OP) is a high-level document made to provide the Town with a general vision and policies for growth up to 2031. Specific to transit, the OP encourages the use and expansion of ActiVan and promotes transit-supportive land uses in Nodes, Corridors and new development areas. The OP also states that Council shall review the need for a municipal transit system and coordinate transportation planning efforts with Regional, Provincial, and Federal transportation initiatives.

### 2.2.4 VISION GEORGETOWN-GUIDING PRINCIPLES (2014)

Vision Georgetown is an aspiring new community in Halton Hills that will be home to over 19,000 residents in the coming years. The growth and development of the community will be guided by 14 principles, 3 of which relate to the need for active transportation and transit services in the community and are listed as follows:

- To design a community that is connected internally and integrated with the rest of Georgetown, and other surrounding communities, through a network of roads, paths and trails;
- To provide wide range of residential commercial, and institutional users, in a manner that reduces the need for an automobile to meet the daily needs of life, and
- To establish a transportation system that safely and efficiently accommodates different forms of travel (including automobiles, walking and cycling) and plans for future public transit.

## 2.2.5 MAYOR'S COMMUNITY ENERGY STRATEGY (2015)

The Mayor's Community Energy Strategy gives direction in pursuing energy efficiency, reducing greenhouse gas emissions, and promoting the use of renewable energy in Halton Hills. This document is organized into two components being the Local Action Plan (LAP) and the Corporate Energy Plan (CEP). The LAP considers land use, transportation patterns, and other factors across the Town to analyze energy use and GHG emissions. While the CEP monitors the sustainability and efficiency of existing and proposed Town facilities.

## 2.2.6 HALTON HILLS STRATEGIC ACTION PLAN (2014-2018)

The Halton Hills Strategic Action Plan (2014-2018) is the predecessor of the Halton Hills Strategic Action Plan (2031). The 2014 Strategic Action Plan sets out eight priorities for the Town to pursue from 2014 to 2018, with the most pertinent priority for the purposes of the Specialized Transit Plan being "Transportation/mobility". The three action items most relevant to transit listed under this priority are:

- Explore with the Region of Halton, inter and intra-regional transit to connect Acton and Georgetown to the rest of Halton, neighboring municipalities, and the Greater Golden Horseshoe;
- Plan the Vision Georgetown community to be 'transit ready' and foster active transportation; and
- Develop a Public Transit Strategy to address the needs of all potential users.

## 2.2.7 METROLINX – THE BIG MOVE (2008)

The Big Move is a Regional Transportation Plan (RTP) by Metrolinx detailing 10 strategies for the future of transportation within the GTHA. It contains strategies, priority actions and supporting policies required to achieve the future vision, as well as an Investment Strategy to finance the transportation system and its short and long-term goals.

The RTP's transportation related goals are to increase transportation choices and interconnectedness. Transportation choices entails people having a wide range of options available to them for getting around regardless of age, means or ability, including walking, cycling, public transit and automobiles. Interconnectedness involves improved connections and service within the GTHA and to/from regional, provincial, and international terminals and facilities.

Of the plan's 10 key strategies, the three relevant to the Specialized Transit Plan are:

### Strategy 5 - Create a Customer-First Transportation System

- Make regional travel more convenient and barrier-free as travelers transfer between modes, services and across municipal boundaries.
- Coordinate schedules among transit service providers, including demand-responsive services for persons with disabilities.

### Strategy 6 – Implement an Integrated Transit Fare System

- Implement a region-wide integrated transit fare system by 2012 that allows users to pay a seamless, integrated fare for all transit systems across the region. This led to the implementation of the PRESTO fare card.

### Strategy 8 – Universal Access

Develop a region-wide strategy and local implementation strategies to improve specialized transit coordination and delivery, and address:

- Opportunities to accelerate the achievement of AODA compliance in transit facilities;
- Integration of eligibility criteria;
- Improved training for transit agencies;
- Expansion of traveler education programs for those who are unsure about using
- Accessible conventional transit services; and
- Coordination of services with transportation providers in the health care sector.

## 2.2.8 THE ROAD TO CHANGE- HALTON REGION TRANSPORTATION MASTER PLAN (2011)

The Road to Change-Halton Region Transportation Master Plan (HRTMP) seeks to provide guidance on the development of a balanced and sustainable transportation system that will meet the Region's transportation needs safely, effectively and cost efficiently to 2031. The HRTMP emphasizes the importance of maximizing the use of transit and other alternatives to reduce the need for trips made using single occupant vehicles.

Specific to intra-regional transit, the HRTMP seeks to ensure that 15 to 20% of all peak period trips within the Region are accommodated by public transit by 2031. The TMP also speaks about introducing Bus Rapid Transit (BRT) services along Dundas Street and Trafalgar Road and that major transit infrastructure studies regarding the implementation of the BRTs are underway. The TMP further identifies the need for more communication across the municipalities in the Region and recommends collaboration between the Region, local municipalities, and Metrolinx to develop an inter-municipal transit strategy for Halton in the short, medium, and long term.

## 2.2.9 MOBILITY MANAGEMENT STRATEGY FOR HALTON (2016)

The Mobility Management Strategy for Halton was developed on the premises of mobility-as-a-service and provides guidance on Region-wide transportation growth from 2016 to 2041 while taking into consideration other regional and provincial policies and timeframes. The key areas of focus of the Strategy are as follows:

- Alignment with Metrolinx Big Move and Regional Express Rail (RER) plans;
- Coordinated regional urban mobility;
- Customer-centric technology-based services;
- Intra/interregional transit connectivity;
- Integration of mobility options; and
- Support transit oriented urban growth.

Furthermore, the Mobility Management Strategy also speaks about the development of a Transit Priority Mobility Network, featuring key transit priority corridors, nodes, and mobility links throughout the Halton Region. The Mobility Network's primary purpose is to enhance connectivity across the Region and promote

active transportation. It is also expected that the Mobility Network will bring other opportunities such as implementing new transit technologies, introducing HOV lanes, and more transit-oriented growth

The recommendations in the Specialized Transit Plan are made with regards to the Region's progress in the focus areas above as well as in the introduction of the Mobility Network.

## 2.2.10 CORPORATE FLEET MANAGEMENT STRATEGY (2019)

The Corporate Fleet Management Strategy (CFMS) is developed to provide guidance on delivering fleet management (FM) services within the Town of Halton Hills. The Strategy is created in hopes of incorporating overarching organizational visions and goals into FM practices as well as enhancing the efficiency of the FM business process. The Strategy can be broken down into 11 key recommendations that are categorized into the four components of the FM business processes which are procurement, operations, maintenance, and disposal/replacement.

## 2.2.11 HALTON HILLS ACTIVAN MASTER PLAN (2014)

The Halton Hills ActiVan Master Plan was created in response to a recommendation made in the Transportation Master Plan (2011). The ActiVan Master Plan examines ActiVan services and operational processes as of 2014 and provides recommendations for improving the system. It also outlines various options for implementing transit services catered to youth.

The 2014 Master Plan addresses the needs of seniors to determine if they are being met by the ActiVan Service provided. The age for seniors to use the ActiVan Service is 65, while the Town allows seniors to join the Seniors Centres and their programs at age 55. The Master Plan considers the findings of the Youth Needs Study currently underway to determine whether this specialized service could also meet the transportation requirements of youth in the Town.

## 2.2.12 TOWN OF HALTON HILLS STRATEGIC PLAN (2020)

The Town of Halton Hills Strategic Plan guides the actioning of activities that will uphold the Town's commitment to the values and attributes that make Halton Hills one of the best places to live. The Plan's vision embraces small town living at its best and aims to foster a Town that is:

- Characterized by spectacular countryside, natural heritage, cultural heritage and small-town feel;
- Enriched by a unique blend of urban and rural interconnected communities and neighbourhoods; and
- Supported by prosperous employment areas.

The Plan's mission is to plan for a vibrant urban and rural community that will deliver a broad range of public service while providing leadership on issues of concern in-line with the following eight values:

1. Foster a Healthy Community
2. Preserve, Protect and Enhance Our Environment
3. Protect and Enhance Our Agriculture
4. Foster a Prosperous Economy
5. Preserve, Protect and Promote Our Distinctive History
6. Preserve, Protect and Enhance Our Countryside
7. Achieve Sustainable Growth
8. Provide Responsive, Effective Municipal Government

The eight directions are further complemented each by a set of priorities and/or focus areas with specific goals to achieve. Transportation is one of these priorities with an aim to enable residents to move around freely by achieving the following goals:

- Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation
- Take urgent action to combat climate change and its impacts

### 2.2.13 CORPORATE ASSET MANAGEMENT POLICY (2018)

The Corporate Asset Management Policy introduces an organization-wide asset management approach named the Corporate Asset Management (CAM) program. The CAM program seeks to take a holistic approach to asset management and requires that all assets be treated as essential components in an interrelated system rather than isolated parts. The CAM program is guided by the following four fundamental goals:

- Providing efficient, effective and sustainable service to meet the needs of our community;
- Optimizing asset value while minimizing lifecycle costs;
- Managing risks to service delivery; and
- Committing to continual improvement of the CAM program.

In addition to these four goals, the Policy sets out the following objectives that the CAM program will adhere to:

- Customer focused
- Innovative
- Fact-based decision making
- Optimal
- Whole lifecycle perspective
- Integrated system focused
- Forward looking & sustainable
- Regulatory compliant
- Risk-based

### 2.2.14 ASSET MANAGEMENT PLAN (2014)

The Asset Management Plan identifies the steps the Town is taking in managing transportation infrastructure assets until 2023. Transportation infrastructure assets accounted for in this Plan include road, bridges, and culverts. The Plan outlines the desired levels of service to be obtained through transportation infrastructure and details the Town's strategies in managing assets throughout their lifecycle, encompassing methods of inspection, routine maintenance, and renewal. The plan also lists the budgets and expenditures of previous years and provides the capital and operating budget forecasts from 2014 to 2023 as well as various sources for funding the expected expenses.

### 2.2.15 HALTON REGION OFFICIAL PLAN (2018)

The Halton Region Official Plan (HROP) was created to give a clear vision as to how physical development should take place in Halton in the long term. It introduces goals, objectives, and policies in support of achieving the Region's vision. The HROP first outlines the geographic, economic, and demographic context of Halton Region. It then speaks about the guidelines in place for developments on the Region's distinct land use designations. The fourth section mainly pertains to the environmental and cultural heritage protection measures enforced in the Region. The final section outlines the implementation of necessary tasks in order to realize the vision set out in the HROP.

The importance of establishing adequate public transit facilities was emphasized in the HROP. Halton Region has an ambitious target of ensuring that the use of public transit accounts for at least 20% of all daily trips made by 2031. To reach this target, the Region encourages the implementation of active transportation and public transit infrastructure as well as a compact growth pattern in urbanized areas. To improve intra-regional connectivity, the Region is currently investigating the necessity and feasibility of a single transit operating authority across the Region.

The Specialized Transit Plan is mindful of Regional objectives and makes recommendations that align with the Region's vision for transit services.

### 2.2.16 MILTON TRANSIT SERVICES REVIEW AND MASTER PLAN UPDATE (2019)

The Milton Transit Services Review and Master Plan Updates seeks to provide an assessment of Milton's Transit services and to provide guidance for the future of Milton Transit from 2019 to 2023. The document reviews the status of Milton's transit service, analyzes the market for the future of transit in Milton, outlines service and performance standards, and offers recommendations in the short, medium, and long terms. Specifically pertaining to transit services connecting with neighboring municipalities, Milton Transit is looking to work with the Town of Halton Hill to introduce a transit route that connects Milton GO station to Toronto Premium Outlets and Lisgar GO station in the near term (2020-2022). Although the Plan does not make references to ActiVan or Universal Access Service, it does reference connecting Halton Hills to key destinations such as the Toronto Premium Outlets and GO Stations.

### 2.2.17 METROLINX GO RAIL STATION ACCESS PLAN (2016)

The GO Rail Station Access Plan is an update to the 2013 GO Transit Rail Parking and Station Access Plan in response to the Provincial commitment to Regional Express Rail (RER), which will increase GO service and support the development of new stations throughout the GO rail network. The plan identifies the need to facilitate and ensure seamless and accessible integration of conventional and specialized transit. It particularly calls out the increased reliance on specialized transit to provide first mile and last mile service as a feeder to conventional services for customers with disabilities. This serves as input into the Specialized Transit Plan with regards to enhancing transfer connections to neighbouring municipalities.

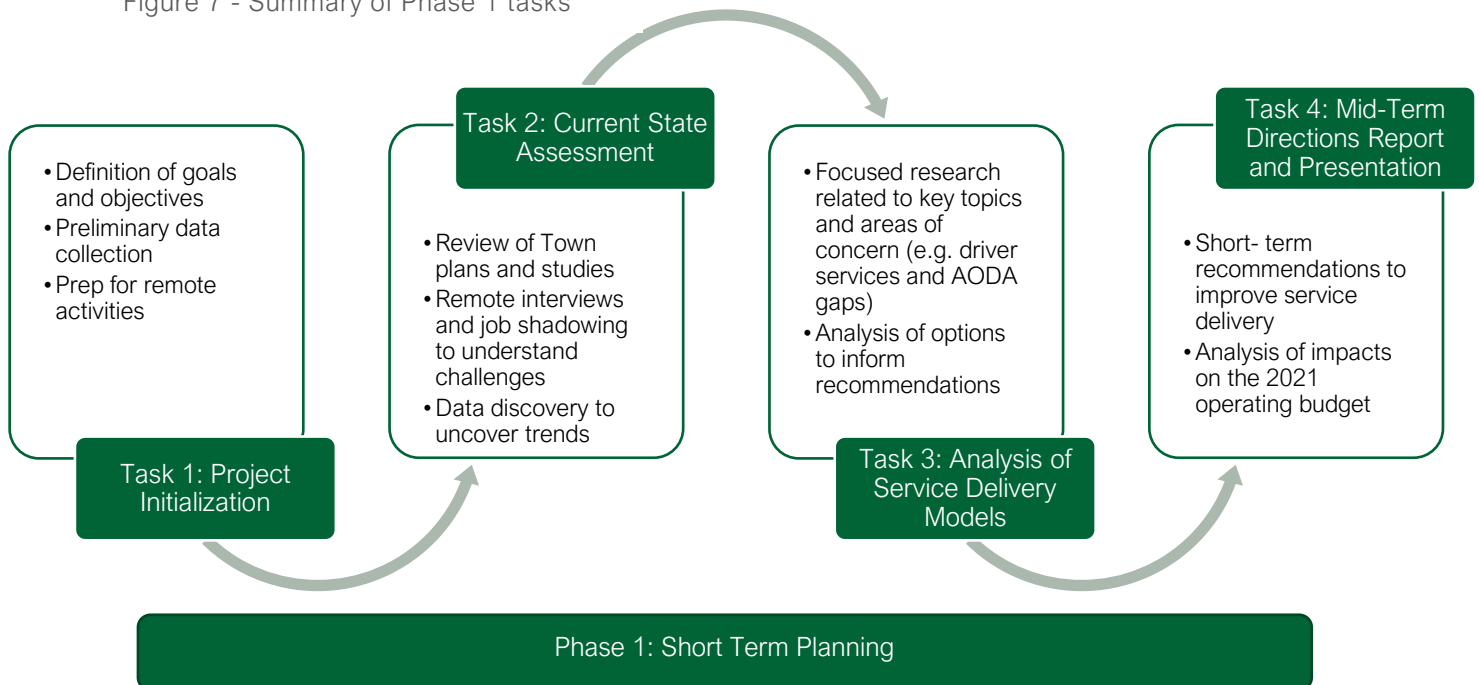
# 3 CURRENT STATE ASSESSMENT

## 3.1 METHODOLOGY

In Phase 1 of the project, LTRT undertook a current state assessment to identify issues and challenges impacting ActiVan. The current state assessment involved data and documentation review and remote discovery sessions with staff and stakeholders to uncover gaps and inefficiencies in processes and policies. Based on the observations of this assessment, key challenges were identified, and preliminary recommendations were developed. These recommendations were developed further through discussions and a workshop with ActiVan staff.

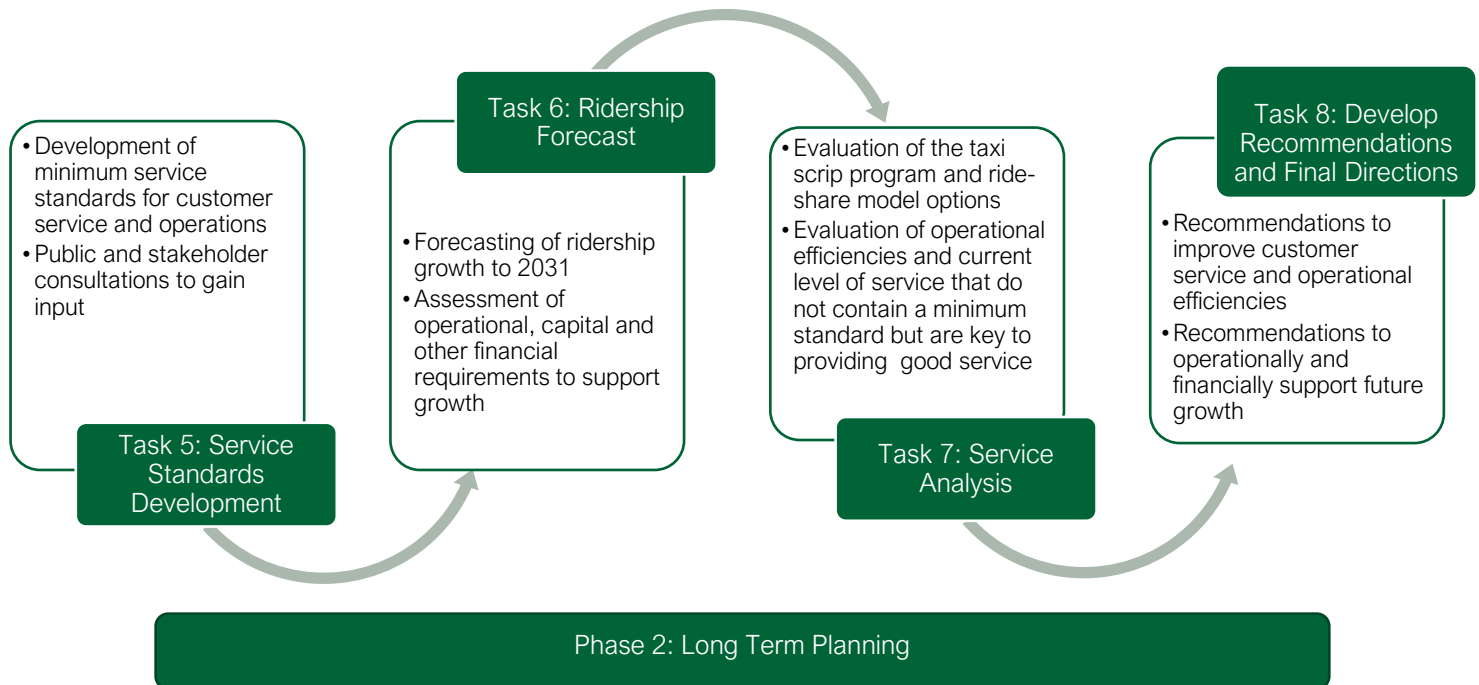
Phase 1 recommendations are made with considerations of their impact on Halton Hills' 2021 budget and are specifically geared towards recommending a service delivery model for ActiVan going forward and addressing any AODA misalignments in current ActiVan practices. The tasks carried out in Phase 1 of the project is described in Figure 7 below.

Figure 7 - Summary of Phase 1 tasks



Phase 2 of the project involves the development of medium and long-term service improvements to increase efficiencies and customer experience, and recommendations to support future growth in ridership. These recommendations will be analyzed and presented in the Final Directions Report in Q2 2021. The tasks carried out in Phase 2 of the project are described in Figure 8 below.

Figure 8 - Summary of Phase 2 tasks



Recommendations for Phase 1 of the project were informed by the challenges identified from the current state review and industry best practices. The methods of analysis employed in the current state assessment to are detailed in the following sections.

### 3.1.1 DATA AND DOCUMENTATION REVIEW

The current state assessment started with the review of data and documentation provided by Halton Hills staff. This review included an assessment of documents and data pertaining to the following:

- Current policies
- Eligibility procedures and statistics
- Operational processes, policies and statistics
- Previous studies and plans
- Organizational structure
- Current technology
- Customer complaints data

The review of the above provided a high-level overview of the current policies and processes at ActiVan and informed the discovery process.

### 3.1.2 STAKEHOLDER MEETINGS AND DISCOVERY INTERVIEWS

The current state assessment involved extensive staff discovery sessions and internal stakeholder meetings. The stakeholders engaged were internal staff representing various departments within the Town of Halton Hills. Stakeholders were asked to share their vision for the Specialized Transit Plan and discuss any concerns or opportunities in relation to the impacts the Plan may have on their department initiatives. The list of stakeholders and staff engaged, and the meeting agenda are outlined in Appendix 1. Discovery sessions with Town staff were conducted to understand day-to-day activities and identify challenges and inefficiencies in the following focus areas:

- Eligibility & Registration
- Booking/Reservations & Operations/Dispatch
- Scheduling/Service Design
- Maintenance
- Customer Service
- Finance & Admin

## 3.2 KEY FINDINGS

The remote discovery sessions showed that ActiVan staff have a strong dedication to serve customers and are eager to make required changes to improve efficiency and customer service. The staff provided valuable insight into the challenges which informed the identification of opportunities. Subsequent analysis of qualitative and quantitative data on the current operational processes of ActiVan resulted in the following key findings.

### 3.2.1 EXCELLENT CUSTOMER SERVICE

The current state assessment revealed that providing timely and considerate customer service and fostering a positive relationship with ActiVan customers is one of the top priorities of ActiVan staff. Analysis of customer complaints in 2019 showed very few complaints about the service. Of the 80,000 trips delivered last year, only 24 complaints were received regarding poor service. Of the complaints received, the majority were related to contracted taxi services concerning on-time performance and no-shows.

### 3.2.2 EFFICIENT OPERATIONAL PROCESSES

ActiVan has been applying best practices to ensure efficient operations. Staff reported that no-show rates were low and updates to schedules are done efficiently throughout the day as cancellations and changes occur. The cancellation policy of three hours is followed by most customers and schedules are optimized to ensure the ActiVan vehicles are utilized to their capacity and that taxis are only used for on demand trips. The practice of sending trip confirmations and reminders to customers who have requested it or those who have had multiple no-show or late arrival incidents is a best practice that helps ensure efficient operations. Staff also reported that the scheduling software has been working well with the exception of efficiency challenges in rescheduling trip change requests. ActiVan also creates trip manifests for taxis which is a best practice that helps to maintain consistent service levels. Although taxi related complaints were the most common of all complaints in 2019, of the 29,000 taxi trips delivered last year, only 15 complaints were received regarding taxis.

It should be noted that capacity-related challenges have led to some gaps in delivering according to AODA requirements and have limited ActiVan from providing a higher level of service (e.g. service on weekends and same day bookings).

### 3.2.3 FOCUS ON NET ZERO COMMITMENT

The focus on sustainability is one of Halton Hills' top council priorities. In recent years, Council has enforced a series of policies and tasks aimed to reduce energy usage and GHG emissions. Specifically pertaining to fleet, Council has stated in the Climate Change Resolution No.2019-0088 the plan to transition to electric vehicles wherever possible, and as soon as possible. Discussion with Town staff revealed that ActiVan is dedicated to its Net Zero Commitment and is resolved to transition to an electric fleet when it becomes feasible to do so. However, staff identified the need for an assessment of the requirements to support the operation and maintenance of an electrified fleet. While not the focus of the short-term recommendations, recommendations regarding infrastructure requirements to support an electric fleet will be made in the Final Directions Report.

### 3.2.4 SERVICE DELIVERY

One of the key objectives of this Specialized Transit Plan is to assess the most effective service delivery model going forward for Halton Hills. The current model with contracted, in-house driver services is well-regarded by ActiVan management. Management reflected positive customer perceptions regarding service which are substantiated by customer complaints data. Cost efficiency is also considered to be strong compared to comparable agencies. However, the current model of contracted staff is untenable long-term and staff either must be brought fully in-house or more formally contracted.

Section 4 of the report assesses these service delivery model options in more depth and makes a recommendation on the model to apply going forward.

### 3.2.5 PREPARING FOR UNIVERSAL ACCESS

The Transit Service Strategy introduced a concrete path forward for the Town of Halton Hills to develop capacity and demand for conventional transit. The recommendations made in the Transit Service Strategy serve as input into the Specialized Transit Plan. In the short-term, the recommendation to implement Universal Access Service will impact ActiVan's eligibility processes and policies. In the long-term, the recommendation that Universal Access be contracted out and administration and dispatch remain in-house for both Universal Access and fixed route bus services will impact the evaluation of additional resources, training, and capital expenditures. This financial analysis will be a key input in Phase 2 of the Specialized Transit Plan.

### 3.2.6 ALIGNMENT WITH THE AODA

ActiVan's current policies and processes with respect to eligibility and operations are generally aligned with the AODA. Given its unique situation of being the only mode of public transportation in Halton Hills, ActiVan has done an excellent job in both customer service, efficient operational processes, and AODA compliance.

However, there are areas in the eligibility process, service design and operational practices that ActiVan should improve on in order to better align with the requirements of the AODA. Areas of improvement in the eligibility process include aligning with AODA eligibility categories and establishing an independent appeals process. Areas of improvement in service design and operational practices include enhancing transfer connections and updating booking and scheduling practices. These issues are further assessed in section 5 of the report.

## 4 SERVICE DELIVERY MODEL ASSESSMENT

In July 2018, the Town transitioned its transit driver services in-house. The transition occurred due to the dissolution of the previous contracted provider, Tyler Transport Ltd. As a result, the transition was quickly applied with the intent for a future review of the service delivery model to ensure an optimal long-term provision of service. To provide the temporary in-house service, ActiVan relied on contracted employment of drivers and administrative staff.

A critical component of the Mid-term Directions Report is the evaluation and recommendation of an appropriate service delivery model for Halton Hills to utilize moving forward. The assessment evaluates whether driver services should be contracted or brought in-house as part of a holistic analysis of service delivery models. Model options were presented, analyzed and a final model recommended. The model options analysis was conducted with consideration for various factors including customer service, economic responsibility and service sustainability.

Specialized transit is operated both as in-house and contracted services across Canada. Contracting a portion of specialized transit is a common practice, with approximately 80% of agencies contracting some element of service.<sup>1</sup> Benefits of contracting operations can include cost effectiveness, ability to leverage vendor expertise and capabilities, and the opportunity to expand the pool of qualified personnel available to deliver service and as well as the flexibility it offers to match demand. Benefits from in-house service provision generally derive from higher levels of customer satisfaction which can result in ridership attraction and enhanced integration with other transit services and municipal functions.

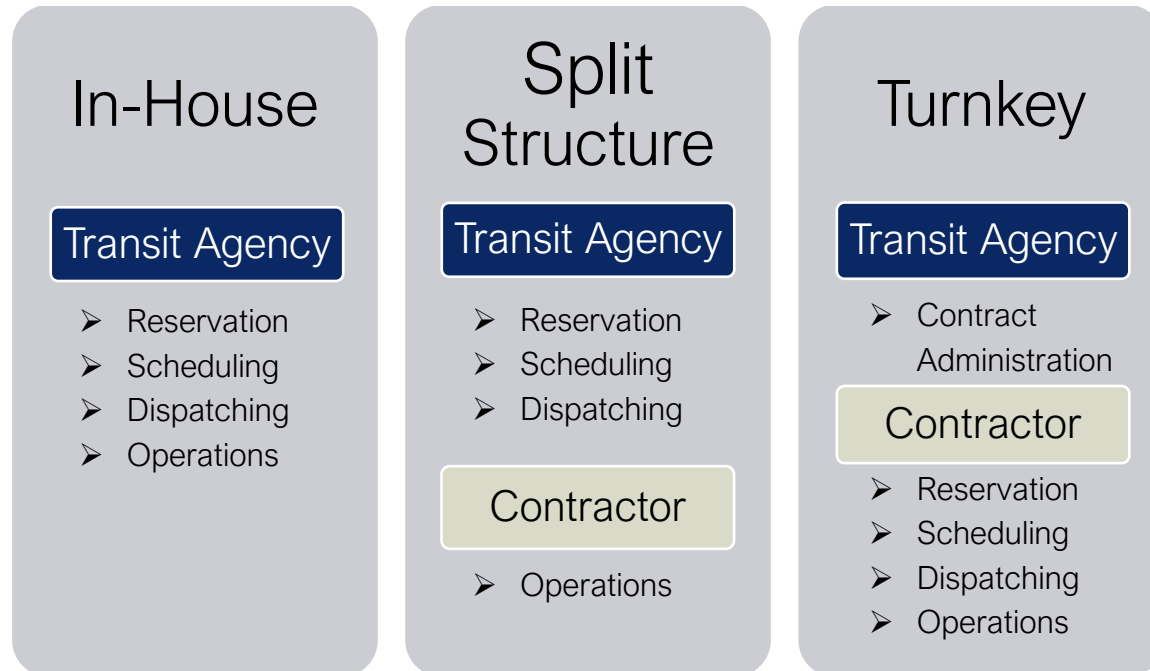
---

<sup>1</sup> The Art of Paratransit Contracting (Nelson\Nygaard 2014)

## 4.1 SERVICE DELIVERY OPTIONS

The most common specialized transit service delivery approaches that are applicable for the Town of Halton Hills are described in Figure below:

Figure 9 - Summary of in-house, split structure, and turnkey service delivery models



**In-house operation** – All functions including setting policies, registration and eligibility determination, customer service, trip reservations, scheduling, dispatching, operations, etc., are delivered by the staff of the transit agency. The exception to this is leveraging non-dedicated service providers such as taxis to deliver trips in time periods and locations where it is more efficient than using in-house resources.

**Split Structure** – Administrative functions are delivered by the public agency and vehicle operations or driver services are contracted through the private sector with expertise in transportation services. This may include dedicated fleets and drivers as well as non-dedicated service providers. In some split structure operations, the reservations, scheduling and dispatching can be contracted as well but to an entity separate from the trip delivery contractor.


Driver services are frequently contracted through private transportation providers. There are a number of companies that have specialized in the field (e.g. First Transit, Transdev, and PWTransit) and more (e.g. Via, Uber, local taxi providers) are entering the market because they see an opportunity as on-demand transportation becomes more popular. School bus operators are also active in delivering transportation services for public organizations. Some of these companies also provide turnkey solutions. For example, the Town of Milton is now contracting its whole transit operations with PWTransit and is entering into a turnkey service design approach.

**Turnkey** - Under this model, the transit agency is responsible for administrative functions such as setting policies, registration and eligibility determination and contract administration. The single contractor is responsible for all aspects of the operations, including reservations, scheduling, dispatching, and trip delivery (driver services). Sometimes the transit agency supplies the vehicles and facilities but not always.

## 4.2 QUANTITATIVE EVALUATION FRAMEWORK

To better enable objective research-based decision making, a quantitative evaluation framework was developed. The framework assesses the three service delivery options against six weighted criteria as summarized in Figure below.

Figure 10- Delivery models and assessment criteria

Delivery Model		Criteria
	In-House	1. Ease of implementation
	Split	2. Potential cost savings and efficiencies
	Turnkey	3. Customer satisfaction
		4. Minimizing operational and organizational interfaces
		5. Flexibility of service delivery
		6. Innovation and modernization

Each service delivery model option was scored High, Medium or Low, for each criterion based on an initial assessment of how well each option responds to or meets each of the evaluation criteria. Figure 11 below outlines scoring method.

Figure 11- Summary of service delivery models' scoring method

Score	Points	Description of Score
Low	1	Option fails to meet the criteria or does not meet the criteria as effectively when compared to the alternate options.
Medium	2	Option can satisfy some of the requirements as set out by the criteria description above.
High	3	Option provides highly efficient and effective delivery solution in regard to the specific criteria. When compared to alternate options, it is expected to deliver on the criteria the most favourably.

Weightings, ranging from 1% to 100% for a total of 100%, were then applied to each of the evaluation criteria, based on an assessment of the relative importance of the criteria to Halton Hills' service delivery decision.

The selection of the six criteria, their weightings, and scores (outlined in Figure 12 below) were based on:

- Consultation with key Town staff to develop an understanding of the factors that are important to stakeholders.
- A literature review and project team experience evaluating service delivery models.
- Consultation with similar jurisdictions that provide specialized transit services and an understanding. Specifically, meetings with Belleville and Milton Transit were held to gain insight into their recent experiences transitioning between delivery models.

A workshop was conducted with the Town staff to review the criteria, weightings and scores and confirm their appropriateness for Halton Hills (See Figure 12 below). Adjustments were made based on the feedback received and subsequent follow-up analysis and research.

Figure 12 - Description of evaluation criteria and weighting

Evaluation Criteria	Weight	Description
Ease of Implementation	15%	<p>The option can be quickly and easily implemented based on consideration of:</p> <ul style="list-style-type: none"> <li>Legislative and regulatory alignment - Option meets current legislative and regulatory mandates including by-laws.</li> <li>Labour considerations - Option is consistent with collective bargaining agreements, contractual arrangements, and other relevant labour considerations.</li> <li>Administrative complexity - Option minimizes organizational and administrative complexity.</li> </ul>
Potential cost savings and efficiencies	20%	<p>Option is relatively cost effective meaning the option is likely to:</p> <ul style="list-style-type: none"> <li>Reduce the current budget required to operate Halton Hills' specialized transit services while maintaining service delivery levels</li> <li>Maintain the current budget while increasing and improving service delivery levels</li> <li>The ability to predict cost of delivery with relative certainty</li> </ul>
Customer Satisfaction	30%	<p>Option maximises the ability to maintain or enhance existing customer levels and to respond to customer service concerns quickly and effectively. This includes all facets of the customer experience including service levels and customer/staff interactions.</p>
Minimizing operational and organizational interfaces	10%	<p>Option can operationally integrate with other functions of the Town of Halton, including:</p> <ul style="list-style-type: none"> <li>effective coordination with the Town's conventional transit service and plans for the introduction of Universal Access Service (UAS) as well as integration with regional conventional and specialized transit services.</li> </ul>
Flexibility of service delivery	15%	<p>Option has sufficient flexibility to meet changing legislative and regulatory requirements or demand for service.</p>
Innovation and modernization	10%	<p>The option promotes, enables, and facilitates an innovative approach to service delivery, encourages use of new technologies and facilitates data driven decision making.</p>

## 4.3 ANALYSIS

### 4.3.1 CRITERIA 1 – EASE OF IMPLEMENTATION

Figure 13 below outlines the scoring for 'ease of implementation'.

Figure 13 – Scoring of each delivery model on the ease of implementation

Evaluation Criteria	Score	Comments
In-house	Medium	Many back-office resources are already established which would ease implementation. The onboarding of drivers creates a greater chance of potential unionization, which would result in more implementation efforts.
Split Structure	High	A split service would allow for easy continuation of in-house scheduling and dispatch while vehicle operations are outsourced. Limited challenge to contracting driver services.
Turnkey	Low	A turnkey solution would require the procurement of a full-service partner which would require a significant amount of effort in designing and managing the procurement process and administrative solution.

A key factor in determining an appropriate service model for an agency is the agency's past involvement and expertise with in-house provision of services. Milton recently turned to a turnkey solution for their specialized transit service partially due to their limited experience with in-house delivery and limited physical infrastructure. ActiVan has, particularly in the past two years, developed the experience, expertise, and physical infrastructure to be confident in supplying both in-house and split structure services. The current service is essentially an in-house model, as such it would require little change initially to fully bring staff in-house. However, over time administrative pressure would likely build, particularly in human resources such as the responsibility to secure additional staff and resources due to increase demand.

Another significant administrative factor in implementation is unionization. There is a greater likelihood of unionization in public employment. Unions generally do not favour part-time work and can try to limit the number and conditions under which part-time workers can be used.

Labour action is a possibility with unionization and a potential disruption to service delivery. Specialized transit is not considered an essential service so the right to strike would be possible by unionized drivers. The probability of a strike would be rare but not impossible. Another element of a unionized workforce is the need for supervisors and managers to be trained in labour relations and following appropriate procedures in interacting with union representatives and unionized workers.

Contracts are another factor of implementation and administration. For a turnkey model, a well-written contract with standards and performance-based incentives is essential and can help an agency balance service quality and cost efficiency. Difficulties can arise when agencies lack an in-depth understanding of the complexity and intricacies of specialized transit operations and may lack the knowledge to hold the contractor to account when needed. With ActiVan's experience, this would likely not be the case for Halton Hills. However, new administrative challenges such as monitoring, and enforcement would present themselves and require significant changes for implementation. Due to these significant administrative components, turnkeys are most often employed in medium and large size systems where the scale of operational cost savings are high. Turnkeys are also high risk administratively. If problems arise with a contractor, it can be challenging to work them out except through the courts. Specialized transit is a very customer-centric service and a strong

partnership between the agency and turnkey service provider is critical to a positive customer experience. Due these factors, the turnkey option would be the most challenging to implement and administer.

The design and administration of a split structure contract is significantly less rigorous as compared to that of a turnkey contract. The ease of implementing a split structure is likely greater than that of an in-house model when incorporating the probability of unionization and other administrative challenges that might arise with fully in-house labour.

Another potential implementation challenge with the contracted models is the availability of private companies with the expertise and capacity to enter such a contract depending local conditions. Larger centres typically have more private transportation providers. In recent years, national and multi-national companies have expanded their capacity and offerings to fill a growing market need. Given the successful implementation of contracted models in adjacent municipalities such as Milton and the proximity to Toronto, we do not assess this to be a specific concern for Halton Hills.

### 4.3.2 CRITERIA 2 - POTENTIAL COST SAVINGS AND EFFICIENCIES

Figure 14 below outlines the scoring for 'potential cost savings and efficiencies'.

Figure 14 - Scoring of each delivery model based on potential cost savings and efficiencies

Evaluation Criteria	Score	Comments
In-house	Low	The literature review and quantitative analysis suggest that in-house delivery will result in the highest operating and wage costs.
Split Structure	Medium	The literature review and quantitative analysis suggest that a split structure model will result in the lower operating and wage costs than an in-house model but higher costs than a turnkey model.
Turnkey	High	The literature review and quantitative analysis suggest that a turnkey delivery model will result in the lowest operating and wage costs.

A literature review and a financial analysis of Canadian specialized transit services both point to more cost-efficiency with increasing levels of private sector involvement.<sup>2</sup> Figure 15 below presents 2018 Canadian Urban Transit Association (CUTA) cost statistics from comparable Canadian specialized transit services to ActiVan relative to their service delivery option.

Figure 15- 2018 Canadian Urban Transit Association (CUTA) cost statistics for each delivery model

Service delivery option	Operating cost per capita	Average operating cost per capita	Average expense per passenger	Yearly trips per capita
In-house	\$10.14 to \$41.19	\$20.32	\$35.14	.69
Split structure	\$4.02 to \$21.04	\$13.26	\$26.35	.56
Turnkey	\$8.09 to \$8.52	\$8.31	\$25.90	.35

The data indicates that the average operating cost of turnkey and split structures were similar, with both generally lower than the cost of an in-house service. Further to this, the average driver hourly top rate was similar for in-house and split structures, which in both cases were higher than for turnkey services.

A potential factor leading to higher costs for an in-house model is the greater likelihood of unionization in a public employment. Driver costs generally take up to 70% of the total dedicated specialized transit costs. Wages are higher with unionization. As discussed in the 'Ease of Implementation' section, unions discourage part-time work. In specialized transit, part-time hours are a key tool in containing cost and delivering a productive service.

Economies of scale help decrease costs in contractual models, particularly in smaller centres. Small agencies have a limited number of staff to manage multiple functions including supervising personnel, planning the service levels, managing day to day operations, attending to the unique needs of a complex, vulnerable rider population and deploying specialized demand-response technology in order to deliver an efficient and effective service. Contracted operators that operate across municipalities and services can draw from larger labour resources which can result in more labour specialization and high productivity.

In-house dispatching and scheduling allow the agency to have control over planning the service mix between dedicated vehicles and drivers, and non-dedicated vehicles which can result in increased efficiency and service quality. While a contracted service is less costly, there is some indication that it is not providing the same level of service. The table above shows the amount of contracted services in a delivery model is negatively correlated with the amount of trips per capita it is providing, indicating a lower level of service. A low level of service would deter customers from making trips. Split structures seem to be effective in balancing costs with service quality. The table above shows a split structure as being comparable with a turnkey in terms of average expense per passenger while producing a balanced result for total trip output.

---

<sup>2</sup> For a literature review sample see, TCRP 135 ADA Paratransit Service Models - A Synthesis of Practice 2018 Will Rodman and William High Nelson\Nygaard Consulting Associates Boston, MA.

### 4.3.3 CRITERIA 3 - CUSTOMER SATISFACTION

Figure 16 below outlines the scoring for 'customer satisfaction'.

Figure 16 - Scoring of each delivery model based on customer satisfaction

Evaluation Criteria	Score	Comments
In-house	High	Scheduling and dispatch service are currently delivered in-house, with staff having a strong relationship with riders at the booking stage, knowing most by name and/or voice. Likewise, the current set of contracted drivers have established strong customer relationships and demonstrated a high level of customer service. Service levels and quality are strong relative to comparable agencies. Bringing vehicle operations in house would allow for continuity in service delivery during trips.
Split Service	Medium	By maintaining in-house scheduling and dispatch services there is some continuity in the level of service delivered from booking through to trip.
Turnkey	Low	Outsourcing scheduling and dispatch services can result in less personal relationships with riders and presents other risks to a positive customer experience.

Specialized transit is a very customer-centric service. High levels of customer service can be provided through all models. However, an in-house model provides the least risk of poor customer service. A poor partnership between agency and contractor including through an ineffective contract or poor oversight can result in low levels of customer service.

Employment tends to be more stable in the public sector. This leads to stronger relationships being formed between staff and customers and better customer service, particularly in small centres. The current strong relationships between ActiVan and their customer base have the highest likelihood of continuation with an in-house model.

As public agencies are focused on the public good and not profit driven, they are better able to accomplish diverse public goals and adapt to any changes in them. Generally, this leads to better community relationships.

Figure 15 gives quantitative support to the high level of service that in-house models provide. Yearly trips per capita have a strong positive correlation with the proportion of in-house work being done in transit service delivery. More trips are likely due to higher levels of service which makes transit usage more attractive.

Belleville Transit recently moved from a split structure to an in-house model for their specialized service partially because perceptions of customer service were low. The principle cause for this was poor oversight and expertise, a factor that would be less applicable to Halton Hills due to their greater administrative capacity and expertise. When driver services were contracted with Tyler Transport, ActiVan managed to achieve high levels of customer satisfaction.

Milton's decision to turn to a turnkey contract was supported by a previous relationship with the contractor, PWTransit, in providing their conventional service. PW Transit had established high levels of customer satisfaction and service quality with that service and formed a strong relationship with Milton Transit.

#### 4.3.4 CRITERIA 4 - MINIMIZING OPERATIONAL AND ORGANIZATIONAL INTERFACES

Figure 17 below outlines the scoring for 'minimizing operational and organizational interfaces'.

Figure 17 - Scoring of each delivery model based on operational and organizational interfaces

Evaluation Criteria	Score	Comments
In-house	High	The full in-house option allows for few challenges in managing interfaces with other Halton Hills operations, particularly transit services, including interfaces with neighbouring municipalities.
Split Service	Medium	The split service option would result in more interfaces to be managed with other Halton Hills departments and services relative to the in-house option. However, transit integration between conventional and specialized services could be improved if the Universal Access Service is contractor to a sole provider along with a split specialized service.
Turnkey	Low	The turnkey option service would result in more interfaces to be managed relative to the in-house Option.

In recently transitioning service delivery models, both Belleville and Milton cited integration between their conventional and specialized transit services as perhaps the key driving factor in their decisions. Belleville had introduced an app-based on-demand component in their in-house conventional service to serve lower demand areas and time periods. The City saw an opportunity to integrate that service with their specialized service by bringing the specialized service in-house. Milton had the same goal of integrated services but had a turnkey conventional model in place. As such they sought turnkey model for their specialized service to bring it under the same contracted provider.

As per the Town's Transit Service Strategy, a conventional transit Universal Accessible Service (UAS) is slated to operate within the next several years. Similar to Wellington and Innisfil, Halton Hill's UAS will operate as an on-demand service, but rather than being in-house, it is expected to operate as a split structure model. However, it is unclear whether the UAS will be contracted to one or multiple providers. Belleville's bus service is also distinct from the UAS which is planned to use cars or vans. Both split structure and in-house models for ActiVan could result in a high level of transit integration with common administration and dispatching services. Service could be planned harmoniously to reach organizational goals such as service productivity and/or service quality in the most effective manner. If ActiVan's driver services were contracted to a single UAS provider, operational interfaces would be lower than with an in-house model. If the two services are not contracted together or the UAS had multiple providers, there would be more transit service interfaces in the split structure model as compared to the in-house model.

An in-house model would provide better integration with other Town functions. As public agencies are focused on the public good and not profit driven, they are better able to accomplish diverse public goals and collaborate with the departments that pursue them. A split structure would still provide strong integration with Town functions as administration and planning would still be provided by the Town. However, it would be less than that of the in-house model. Due to the uncertainty of UAS contracting, an in-house model results in the highest score for minimizing organizational interfaces. It achieves high levels of inter-departmental integration and will likely result in the highest level of transit integration as well. A turnkey option would provide the lowest level of operational and organizational integration.

### 4.3.5 CRITERIA 5 - FLEXIBILITY OF SERVICE DELIVERY

Figure 18 below outlines the scoring for 'flexibility of service delivery'.

Figure 18 - Scoring of each delivery model based on the flexibility of service delivery

Evaluation Criteria	Score	Comments
In-house	High	An in-house model will allow for quick adaptation to legislative changes. Notwithstanding this, council approval will be required for changes requiring additional resources and/or vehicles.
Split Service	Medium	It is anticipated that ability to be flexible will be similar to an in-house model.
Turnkey	High	With a turnkey model, the flexibility to respond to legislative changes or ridership growth can be written into the contract. The enhanced flexibility of this options stems from the ability of contracted operators to rapidly respond to changes by moving resources within their organization.

The possibility for adaptation is always available for in-house or split structure models but often it will require council approval for changes requiring additional resources. Belleville, for example, cited the flexibility to change service delivery to integrate with their on-demand service as rationale for bringing specialized transit in-house. This would be more difficult to write into a contract except when a contractor provided both services.

The COVID-19 pandemic provides an example of the flexibility of an in-house model. Service and health and safety measures were able to be rapidly adjusted. These adjustments were aimed at diverse goals including changing demand as well other societal goals such as limiting virus transmission and the provision of an essential service.

With a turnkey, adaptations are at times not available immediately if they are not incorporated into the contract. However, requirements to adapt to changing legislation and ridership demand are often written into specialized transit contracts.

A turnkey model provides flexible service delivery due to their economies of scale. They can, most easily, adjust service delivery to meet changes in demand or expectations drawing on their extensive labour and vehicle pools. If there is a need resources from other jurisdictions.

## 4.3.6 CRITERIA 6 - INNOVATION AND MODERNIZATION

Figure 19 below outlines the scoring for 'innovation and modernization'.

Figure 19 - Scoring of each delivery model based on innovation and modernization

Evaluation Criteria	Score	Comments
In-house	Medium	Halton Hills is generally very responsive to opportunities to improve technology. There may however be limitations in the ability to keep pace with technological changes.
Split Service	Medium	With a split service, Halton Hills is expected to be very responsive to opportunities to improve technology for scheduling and dispatch services as in the case of an in-house model. For vehicle operations, Halton Hills is expected to benefit from new technology at contract inception, however the private sector partner is expected to be less incentivised to make improvements over the life of the contract, as in the turnkey model.
Turnkey	Medium	There is less incentive for contractors to make improvements over the life of the contract. However, private contractors are able to benefit from economies of scale to keep pace with technological changes.

In-house service models tend to be less innovative and have less focus on continuous improvements in service delivery. Innovation is certainly possible within the public sector but sometimes a challenge as securing approval for risky initiatives is less likely and decision-making processes can be lengthy. Increased profits are a strong motivator for innovation. However, ActiVan is currently not demonstrative of the generalization that in-house models are not as innovative, as it has consistently pursued innovation and sought out best practices

Innovation with contractors, however, does tend to slow over the life of the contract. Contractors are sometimes incentivized to withhold innovation as negotiating chips for their next contract. As a whole, the different model options for Halton Hills are approximately equals in terms of innovation.

#### 4.3.7 EVALUATION RESULT

Based on the evaluation conducted, the weighted scores of the Options were calculated. The results are presented in Figure 20 below:

Figure 20 - Results of the weighted scoring of each delivery model

Evaluation Criteria	In-house				Split service			Turnkey		
	Weight	Score	Points	Weighted score	Score	Points	Weighted score	Score	Points	Weighted score
1. Ease of Implementation	15	Medium	2	0.3	High	3	0.45	Low	1	0.15
2. Potential cost savings and efficiencies	20%	Low	1	0.2	Medium	2	0.4	High	3	0.6
3. Customer Satisfaction	30%	High	3	0.9	Medium	2	0.6	Low	1	0.3
4. Minimizing operational and organizational interfaces	10%	High	3	0.3	Medium	2	0.2	Low	1	0.1
5. Flexibility of service delivery	15%	High	3	0.45	Medium	2	0.3	High	3	0.45
6. Innovation and modernization	10%	Medium	2	0.2	Medium	2	0.2	Medium	2	0.2
<b>Total Weighted Score</b>				<b>2.35</b>			<b>2.15</b>			<b>1.8</b>

## 4.4 RECOMMENDATION

The quantitative analysis and the project team's professional qualitative assessment point to strong cases for both in-house and split structure service models. Due to its slightly higher scoring in the quantitative analysis, it is recommended that ActiVan pursue an **in-house model**.

The in-house model proves an excellent choice in minimizing organizational interfaces, enabling service delivery flexibility and most importantly, maximizing customer satisfaction. Due to the customer-centric nature of specialized transit and its role as an essential service, customer satisfaction is weighted higher than other criteria in the framework. While an in-house model does not score high in terms of cost-efficiency, the higher level of service it does provide, to transit customers and the community alike, in conjunction with its resiliency and sustainability make it the most attractive option.

While the ultimate recommendation is to pursue an in-house model, the case for a specialized split structure transit service is bolstered if driver services are contracted with the same provider as a sole-sourced Universal Access Service. This consideration is particularly important due to the increasing popularity of family of services and mobility-as-a-service concepts. The integration of conventional and specialized service is an important consideration in service delivery model selection. However, even in the case of a sole sourced contract, a specialized split structure is not clearly the model of choice. An in-house model would still score highest in the quantitative framework. Deferring an ActiVan service delivery model decision until decisions are made regarding Universal Access Service would therefore prove of little value.

# 5 AODA COMPLIANCE ASSESSMENT

## 5.1 SUMMARY OF CHALLENGES AND ANALYSIS

ActiVan's current eligibility and operations policies and processes are generally aligned with the AODA. However, there are opportunities to better align some policies and processes with the requirements of the AODA Integrated Accessibility Standards (IASR). The AODA related recommendations made in this report align with the requirements of the IASR, which stipulates that the requirements must be met by January 1, 2017.

### 5.1.1 ELIGIBILITY PROCESSES

The following sections summarize the gaps in the AODA pertaining to eligibility processes. These gaps require changes to be made in order to be compliant with AODA requirements and also help ActiVan prepare for the implementation of Universal Access Service. These eligibility gaps are detailed in the sections below.

#### 5.1.1.1 Eligibility conditions

Currently, ActiVan uses two categories of eligibility to assess its applicants: permanent and temporary eligibility. While intended to have the same definition, the 'permanent eligibility' terminology does not align with the term defined in the AODA.

With the introduction of Universal Access Service, ActiVan will want to introduce conditional eligibility. This recommendation has already been taken to Council in the June 2019 Council report, along with the plan to update ActiVan's application to better align with other Halton Region specialized transit agencies including Oakville, Milton and Burlington.

#### 5.1.1.2 Appeal Process

Historically, ActiVan has had no need for an appeal process due to their low rate of eligibility denials.

Currently, the only applications which ActiVan denies eligibility are those that live outside of ActiVan's service area. As the service continues to grow, more individuals with a wide range of disabilities will begin applying for service. It is anticipated that ActiVan will begin to see a denial rate that is similar to that of its GTHA peers, ranging from 1-3%. Establishing the appeals panel and subsequent processes now will allow ActiVan to be prepared for appeals to take place in the future.

#### Categories of Eligibility

##### AODA/IASR Section 63. (1)

Every specialized transportation service provider shall have three categories of eligibility to qualify for specialized transportation services,

- unconditional eligibility.
- temporary eligibility; and
- conditional eligibility

#### Eligibility Application Process

##### AODA/IASR Section 64. (5)

A specialized transportation service provider shall establish an independent appeal process to review decisions respecting eligibility.

##### AODA/IASR Section 64. (6)

A specialized transportation service provider shall make a decision on an appeal with respect to eligibility within 30 calendar days after receiving the complete appeal application, but if a final decision is not made within the 30 days, the applicant shall be granted temporary eligibility until a final decision is made.

## 5.1.2 SERVICE DESIGN AND OPERATIONAL PRACTICES

The following sections summarize AODA gaps with regards to transfer connections and operational policies and practices. The current state assessment revealed problematic transfer connections and misalignment with the AODA with regards to the booking policy and inefficiencies in scheduling processes. The root of these practices stem from capacity and resource constraints that are recommended to be addressed in the short-term to improve efficiencies and customer experience.

### 5.1.2.1 Transfer Connections

The spirit of the AODA encourages facilitating connections with neighbouring services including the establishment of transfer points.

The current state assessment revealed several challenges with transfer connections including those to conventional services to access medical facilities in Milton, Mississauga, and Oakville. Routes to and from the facilities in these municipalities were often circuitous and customers lacked knowledge of the connecting services. An emerging challenge is the lack of connectivity between ActiVan and the recently launched, Ride Well service in Wellington County.

#### Co-ordinated service

##### AODA/IASR Section 69. (1)

Where specialized transportation services are provided in adjacent municipalities within contiguous urban areas, the specialized transportation service providers shall facilitate connections between their respective services.

##### AODA/IASR Section 69. (2)

Specialized transportation service providers to which subsection (1) applies shall determine the accessible stops and drop off locations in the contiguous urban areas that have specialized transportation services.

### 5.1.2.2 Booking Policy and Scheduling Processes

Currently, ActiVan requires customers to book trips at least 48 hours in advance. This booking period allows the Transit Assistant sufficient time to schedule trips while handling other tasks including reservation, dispatch and customer service. However, this practice is misaligned with the AODA which requires specialized transit agencies to accept trip requests up to three hours before end of service on the day before intended day of travel. Furthermore, the current 48-hour booking policy is limiting ActiVan from enabling customers to book on-demand trips with a shorter booking window. The lack of resources on weekends has also led to customers being unable to book trips on weekends or receive support. Any customer issues with taxi trips that occur on the weekends are also deferred to be handled the following week, which can be an inconvenience to customers.

#### Booking

##### AODA/IASR Section 71. (1)

Every specialized transportation service provider shall, where the specialized transportation services require reservations,

- (a) provide same day service to the extent that it is available; and
- (b) where same day service is not available, accept booking requests up to three hours before the published end of the service period on the day before the intended day of travel.

## 5.2 RECOMMENDATIONS

### 5.2.1 ELIGIBILITY PROCESS IMPROVEMENT RECOMMENDATIONS

The following sections summarize the recommendations for ActiVan to better align its eligibility processes with the requirements of the AODA. The recommendations pertain to the update of eligibility categories terminology and the establishment of an appeals process. Additional recommendations have been made to support and improve the eligibility assessment process. These include an update to the application to follow a social model of disability and better align with Halton Region's other specialized transit agencies.

#### 5.2.1.1 Update eligibility categories

It is recommended that ActiVan update its 'permanent' eligibility category to the term 'unconditional' eligibility to better align with AODA terminology. Figure 21 below summarizes the recommendation to update eligibility terminology. Once Universal Access service is implemented, ActiVan will want to introduce and begin granting conditional eligibility where appropriate. Phase 2 of the Specialized Transit Plan will detail the type of conditions to introduce that will best serve ActiVan and align with its peers.

Figure 21 - Summary of recommendation to update eligibility category terminology

Update eligibility categories		
Recommendation	Challenge Addressed	Implementation Considerations
Update 'permanent' eligibility category name	Currently, ActiVan's permanent eligibility category is not aligned with AODA terminology.	Update 'permanent' eligibility to 'unconditional' eligibility.

#### 5.2.1.2 Establish an independent appeals process

It is recommended that ActiVan establish an independent appeals process with an appeals panel consisting of members in line with best practices. Many specialized transit agencies establish an independent appeals panel that consists of representation from a healthcare professional (such as Occupational Therapists) and persons with lived experience (includes both persons with a variety of disabilities and also professionals working to support individuals with disabilities).

The persons with lived experience ensure that the perspective of persons with disabilities is represented. This panel member can weigh in on both the health and transit perspectives with regards to what is reasonable. Agencies with conventional transit also have a transit expert (such as a transit manager from conventional transit) on the panel. The transit expert brings knowledge and expertise of the conventional transit system and can weigh in on what is reasonable when travelling on specific routes. At the moment, this does not apply to ActiVan, however once Universal Access and fixed route service are implemented, the appeals panel can be updated to include a transit expert.

Industry standard would be to have a three-member appeals panel. Generally, transit agencies recruit 2-3 people from each of the above categories and rotate through participants, ensuring that one representative from each category is present for each three-member appeal panel. Given that ActiVan currently does not have conventional transit, until UAS is implemented, it is recommended that the panel be comprised of three members with lived experience.

Figure 22 below describes the recommendation to establish an appeals process with a summary of the challenges addressed and next steps for implementation.

Figure 22 - Summary of recommendation to establishing an appeals process

Establish an independent appeals process		
Recommendation	Challenge Addressed	Implementation Considerations
Establish an independent appeals process	There is no formal appeals process for denied applicants to appeal their eligibility. This practice is not in compliance with the AODA. Although ActiVan currently has a low denial rate, as the service grows,	<p>It is recommended that ActiVan begin creating their appeal panel by taking the following steps for implementation:</p> <ol style="list-style-type: none"> <li>1. Create a posting to recruit 3-5 individuals from the persons with disabilities community</li> <li>2. Develop an appeals panel training program.</li> <li>3. Communicate the new appeal process publicly, on the website and on the application form or eligibility denial letters.</li> </ol>

### 5.2.1.3 Update eligibility application for persons with disability

The current application form for persons with disabilities is rooted in the 'medical model of disability' as it is primarily filled out by the healthcare professional only. The form lacks the opportunity for the person with the disability to provide information about themselves and their functional limitations. The 'social model of disability' suggests that persons with disabilities should be given a voice and be encouraged and empowered to inform others about their abilities and the barriers that present themselves as they interact with their environment. The social model is built on the understanding that the best way to know how to provide service to a person with a disability, is to ask them directly and provide them with the opportunity to inform the agency what their needs are. By updating the eligibility application form to include the opportunity for applicants to describe their disability, ActiVan will glean more valuable information about the applicant, their eligibility and how to match them with the right level of transit service for their needs.

The application form should also be updated to include reference to all disabilities, rather than just physical. For example, section E. on the current application form states, "Diagnosis of physical disability" and "List applicants' physical restrictions and how they affect his or her mobility. Since January 1, 2017, the transportation standard within the AODA has required that anyone with a disability that impedes their ability to use conventional transit should apply for specialized transit. While ActiVan is currently compliant with this by providing transportation to a variety of disability types beyond physical disabilities, the application form should be updated to reflect this.

The current application form also has opportunities to use more inclusive language. ActiVan may consider removing terminology such as "suffers from," "impaired," and "escort." Additionally, it is best practice to remove collection of sex, i.e. male/female from the application form and use gender neutral pronouns throughout. Both Milton and TransHelp follow these inclusion guidelines.

It is recommended that ActiVan review the application form for the other Halton Region specialized transit agencies including Oakville, Milton and Burlington and consider updating the application form to be in close alignment with the providers within Halton Region. This includes expanding the types of healthcare professionals that are approved to complete the form, particularly ensuring that providers for mental health and cognitive disabilities are included, such as a Psychologist, MSW and Day Program Supervisors.

Figure 23 below describes the recommendations around updating the current application with a summary of the challenges addressed and next steps for implementation.

Figure 23 - Summary of recommendation to update eligibility application for persons with disabilities

Update Eligibility Application for Persons with Disabilities		
Recommendation	Challenge Addressed	Implementation Considerations
Create new eligibility application form for persons with disabilities	The current application is not aligned with that of Halton Hills' transit partners (i.e. Milton, Oakville and Burlington). The application only requires a healthcare professional's input and does not allow applicants to describe their own limitations. In addition, the questions are structured around a medical model of disability rather than a social model, which is the industry best practice. Current language may present a risk for complaints regarding inclusive terminology.	<p>Begin reviewing application forms from both Milton and TransHelp. Determine draft outline for new application.</p> <p>The new draft and the rationale for the changes should be presented to the Halton Accessibility Advisory Committee for feedback.</p> <p>It would be beneficial to notify external stakeholders such as day program staff, or OT's/ PT's that commonly submit applications.</p>

Update application form for seniors	<p>The Town currently does not have any information (other than age and mobility aid) on any other disability of its senior customers. This can be confusing to seniors who want to apply for ActiVan on which application to submit.</p> <p>Additionally, regardless of the reason for eligibility (i.e. age), ActiVan would benefit from collecting more information about their customers. The current senior's application form does not allow the opportunity for a senior to notify ActiVan about their disability and needs. This information would benefit ActiVan by providing more details that would help both customer service and operations to serve the customer better, i.e. if the senior is also blind, that information would be beneficial for ActiVan to know when providing service.</p>	<p>Begin revising the application form for persons with disabilities. Once the new application has been finalized, determine which questions would be beneficial to add to the seniors' application form.</p> <p>Review these draft changes with key stakeholders such as the seniors active living centres etc.</p>
-------------------------------------	--	--

## 5.2.2 SERVICE DESIGN AND OPERATIONAL PRACTICES

The following sections summarize the recommendations for ActiVan to better align with the requirements of the AODA with regards to transfer connections and booking and scheduling processes. While there is no direct AODA misalignment with the current transfer connections, there are opportunities to better align with the AODA's requirement of facilitating coordinated services by enhancing current problematic transfer connections. These are further detailed in section 5.2.2.1.

With respect to operational practices, the current state assessment revealed that ActiVan's processes are generally working well. However, there is a misalignment with the AODA with regards to booking policies. Recommendations to update booking and reservation policy have been made in section 5.2.2.2. The section also details subsequent recommendations to support the proposed policies and other measures ActiVan can take to improve efficiencies and customer experience.

### 5.2.2.1 Enhance Transfer Connections

ActiVan borders several transit providers where transfers either do not exist or are reported to be problematic. While some of the following recommended transfer enhancements do not address gaps in AODA compliance, a single comprehensive assessment of transfer connections provides greater efficiency and vision for an improved long-term outcome. An analysis of various transfer connection locations was conducted, and five connections have been identified to proceed with in the short-term. These connections were identified in the Transit Service Strategy as potential conventional transit transfer points but have been identified by the project team as beneficial to ActiVan to be implemented in the short term.

#### Wellington County Transfers

On October 1, 2019, Wellington County launched Ride Well, a transit service that reaches the border with Halton Hills. To date, there have been no requests for transfers between ActiVan and Ride Well. However, it can be expected that requests will occur in the future. It is recommended that ActiVan pre-empt those

requests and begin discussions with Ride Well over potential transfer coordination between the two service areas. Central to this coordination would be the identification of a transfer point.

A transfer point in Acton, Rockwood or between on Highway 7 would be on-route for most trips between Halton Hills and Wellington County including Guelph. The transfer point discussion should include consideration of a shelter waiting area, compatible facility operating hours, designated stop signage and sufficient curb heights and sidewalk width to allow for accessible vehicle access and mobile device turning radius. One potential point that would meet these considerations is the Acton GO train station.

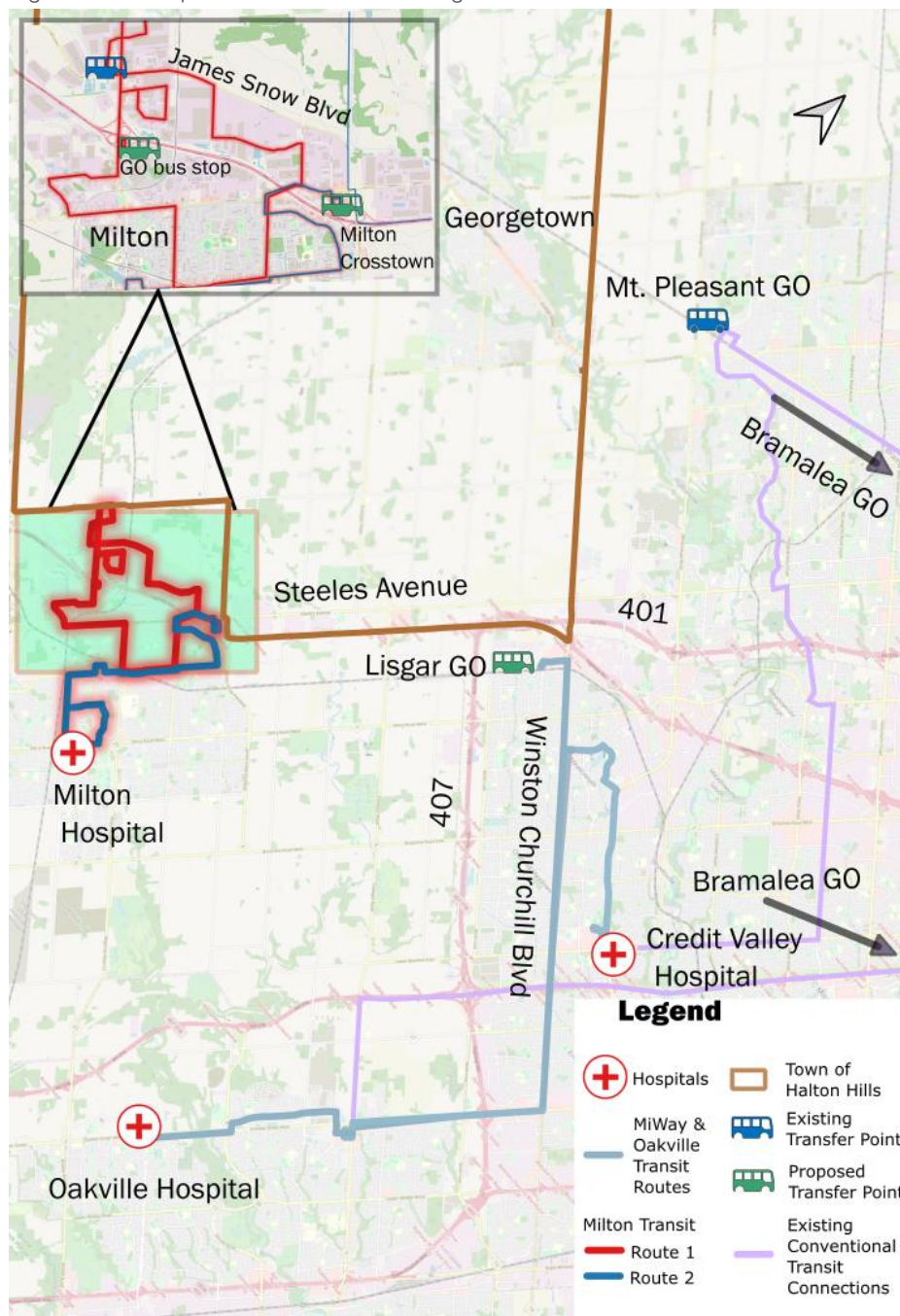
#### Milton and Mississauga Transfers

Transfers to Municipalities south of Halton Hills have been identified as problematic. A particular challenge is for ActiVan customers who do not qualify for specialized service in adjoining municipalities. To travel beyond Halton Hills' border, customers must transfer to a conventional service. Two issues arise: first, there is a poor understanding of adjacent conventional transit by ActiVan customers. Second, there is limited locations to transfer to adjacent conventional transit which results in longer than necessary travel times.

ActiVan currently serves two transfer points outside of Halton Hills: the Mt. Pleasant GO Station and the Tim Hortons at Regional Road 25 and James Snow Parkway N. The 2019 Transit Service Strategy identifies several other regional transit nodes that could be used as origins/destinations for a planned conventional transit service in Halton Hills. The utilization of several of the nodes outside of Halton Hills by ActiVan would significantly improve travel times and transfer experiences for customers transferring to both conventional and specialized services on-route to Milton, Mississauga, and Oakville (see Figure 24 below). No new infrastructure would be required at the sites. It is recommended that the following locations be immediately designated as transfer points:

1. Lisgar GO Station
2. Regional Road 25/Highway 401 GO bus stop
3. Milton Crossroads at Walmart bus stop

Figure 24 - Map of relevant connecting conventional transit services and transfer points



#### Lisgar GO Station

Three hospitals have been identified as the predominate destinations for the challenging transfers noted above. Providing service to the Lisgar GO station would significantly reduce trip times to two of those hospitals, Credit Valley Hospital and Oakville Trafalgar Memorial Hospital. Conventional transit travel would be reduced on average by 30 minutes to the Oakville hospital and by 45 minutes to the Credit Valley Hospital. ActiVan trips to Lisgar would require approximately five minutes of additional drive time from/to Georgetown

as compared to Mt. Pleasant. Therefore it is recommended that a transfer connection be established at Lisgar GO station.

#### Regional Road 25/Highway 401 GO bus stop

While the current transfer point at Regional Road 25 and James Snow Parkway is nearby, the conventional stops located in proximity are not accessible and do not contain shelters. The GO bus stop at Regional Road 25 and Highway 401 is both accessible and contains numerous amenities including a large shelter, benches, and schedule information. Therefore, it is recommended that a transfer point be established at the Regional Road 25 and Highway 401 GO bus stop.

#### Milton Crossroads at Walmart bus stop

This Milton Transit stop provides several benefits over the Regional Road 25/Highway 401 GO bus stop. First, it is served by Milton Transit's Route 2, which provides a single bus service to the Milton Hospital. Second, it is closer to Georgetown, limiting ActiVan travel and improving transfers to the east end of Milton for that location. One disadvantage to this location is the lack of shelter or stop amenities. Although the Wal-Mart entrance is close, and provides seating and shelter, ActiVan should encourage Milton Transit to implement a dedicated shelter and seating at this location.

In addition to better transfer points, ActiVan could improve the transfer experience for customers by improving riders' understanding of conventional service in bordering communities. This could be accomplished through the development of webpage content on inter-regional transit connections. This page could have a description of eligibility issues, highlight transfer points and provide links to the webpages of bordering transit service providers.

Finally, transfers with conventional services could be made more seamless through enhanced scheduling. When a customer requests a trip with the intent to transfer to a conventional service, ActiVan should schedule that trip based on a guaranteed arrival time which corresponds with the connecting departure time.

Figure 25 below describes the transfer connection enhancement recommendations with a summary of the challenges addressed and next steps for implementation.

Figure 25 - Summary of recommendations to enhance transfer connections

Enhance Transfer Connections		
Recommendation	Challenge Addressed	Implementation Considerations
Pursue discussions with Ride Well in Wellington County to facilitate transfers and establish a transfer point.	Ride Well is new transit service that borders the ActiVan service area. There are currently no transfers between the services.	Transfer point consideration should include designated stop signage, curb and sidewalk construction for accessible vehicle access and transfer movements and shelter availability that is compatible with ActiVan service hours.
Establish new transfer points at the Lisgar GO Station, Regional Road 25 / Highway 401 GO bus stop and Milton Crossroads at Walmart bus	Customers that are not eligible for specialized transit in bordering municipalities, have indicated frustration when transferring to conventional service. One issue	This modification will result in small changes to demand which should be assessed in service planning.

stop.	is limited locations to transfer to adjacent conventional transit, which results in longer than necessary travel times.	
Create website content on inter-regional transfer information	There are indications that ActiVan customers have a limited understanding of adjacent conventional transit service which impairs their ability to travel regionally.	Dedicate resources to develop webpage content.
Schedule transfer trips to conventional services based on their departure time information	Long transfer waits in connecting to a conventional service impair service quality. Customers also face barriers to understand connecting trip information. This opportunity would create more seamless transfers and improve customer service with minimal effort.	Internal education on web-based conventional transit schedule and trip planning information from Brampton Transit, GO Transit, Milton Transit and MiWay.

#### 5.2.2.2 Update booking policy and scheduling processes

It is recommended that ActiVan accept trips up to three hours before the end of service period the day before the intended day of travel. This will ensure compliance with the AODA and better serve customers. However, reducing the minimum notice for reservation to three hours will require ActiVan to accept trip requests from 7:00 AM to 8:00 PM, 7seven days a week in order to comply with the AODA's requirement of providing accessible means to accept reservations.

Furthermore, the current advanced booking notice policy of 30 days is misaligned with best practices. Industry best practice is to allow customers to book up to seven days in advance. This reduced window balances the ability of customers to plan trips in advance while enabling scheduling to be more efficient. This is because the longer the advance booking window the more likely changes happen in people's plans, resulting in an increase in the time spent cancelling and rescheduling trips. It is recommended that ActiVan roll out both updates to the booking policies together to limit the number of disruptions to customer booking habits.

In addition to the booking policy updates, it is recommended that ActiVan review and update its scheduling process. The current state assessment revealed that while most of the scheduling and dispatch processes work well for ActiVan, the current process of scheduling the morning before service has inefficiencies and does not align with industry best practice. Although the current practice is in place due to resource constraints in the evenings from dispatching and booking activities, scheduling the morning before service leads to inefficiencies as customers change and cancel trips throughout the day.

Figure 26 below describes the booking policy and scheduling process recommendations with a summary of the challenges addressed and next steps for implementation.

Figure 26 - Summary of recommendations to update booking policy and scheduling processes

Update Booking Policy and Processes		
Recommendation	Challenge Addressed	Implementation Considerations
Accept trip requests up to 3 hours before end of day	Customers are not able to book on-demand trips less than 48 hours before their trip. Without conventional transit, it has been difficult for customers to travel on demand in a reliable manner. In addition, Industry practice in Ontario is to have a minimum notice of 15 hours or less.	Consider shifting the Transit Assistant's workload or hiring additional part-time resources in order to free up time to accept trips requests up to 3 hours before end of day.  Communicate new policy to customers.
Introduce weekend capacity to accept bookings, schedule trips and handle customer inquiries.	Data analysis showed that 50% of all complaints last year took place on weekends. However, issues are only addressed the following week since there is no weekend capacity for customer service. Customers also cannot book trips on weekends.	Providing reservation and customer service on weekends provides customers with more options to travel for weekend activities and enables ActiVan to address customer concerns regarding weekend taxi trips. In order to implement weekend capacity, additional dispatchers must be hired to accept reservations, respond to customer inquiries and schedule trips booked for Sunday and Monday.
Schedule night before instead of morning before	Trip bookings can change throughout the day, and scheduling too early in the day can lead to inefficiencies if customers change or cancel plans. Scheduling the night before service enables the transit assistant to work with the most up to date booking data.	Consider hiring additional resources in order to support the Transit assistant.
Reduce advanced booking notice policy from 30 days to 7 days	In anticipation of future increase in demand, the booking window should be shortened to decrease the likelihood of cancellations.	Assess the workload and capacities of the Transit Assistant in booking trips in a shorter timeframe.  Communicate this change in booking policy to current ActiVan users and advertise policy change on online/in-person platforms.

## 6 2021 BUDGET IMPACT SUMMARY

Figure 27 below details the impacts that each recommendation will have on the 2021 budget. Several recommendations do not have a monetary budget impact since staff time is the only requirement for implementation. For recommendations with a monetary budget impact, the range of costs provided reflect industry standards.

Figure 27 - Summary of 2021 budget impacts

2021 Budget Impact Summary		
Recommendation	Description of impact on budget	Impact on budget (\$)
<b>Service Delivery Model</b>		
1. Implement an in-house service delivery model by transitioning contracted drivers to Town employment.	Labour cost differential of Town employment as compared to current contract. <ul style="list-style-type: none"> <li>Wage increase is assumed from \$24.85/hr to \$25.90/hr. Projected wage reflects the current wage being at the low-end of comparable specialized transit operator wages and matches the current Town wage for labourers.</li> <li>Benefits are expected to increase by 21% for full-time operators and 4% for part-time operators to match Town staff.</li> </ul>	\$47,000 per year
<b>AODA Compliance and Service Design</b>		
<b>Eligibility Process Improvements</b>		
2. Update the 'permanent' eligibility category to be consistent with AODA terminology.	ActiVan staff time to update terminology in policy and application	N/A
3. Establish an independent appeals process by recruiting a three-member appeals panel.	<ul style="list-style-type: none"> <li>Persons with lived experience serving on the panel are typically paid an honorarium of \$100 per day of appeals.</li> <li>It is expected that ActiVan will experience 1-2 appeals a year.</li> <li>ActiVan staff time to create posting, interview and recruit a pool of panel members.</li> </ul>	\$600 to pay honorariums to appeal panel participants
4. Create new eligibility application form for persons	ActiVan staff time to develop new application and communicate changes to customers.	N/A

with disabilities		
5. Update application form for seniors	ActiVan staff time to update application and communicate changes to customers.	N/A
<b>Enhance Transfer Connections</b>		
6. Begin discussions with Ride Well in Wellington County to facilitate transfers and establish a transfer point.	Physical infrastructure is likely not required. Increased costs to the “ad-hoc” taxi budget is possible with more service coverage. However, this is not expected with continuing depressed demand expected into 2021 due to the covid-19 pandemic.	N/A
7. Establish new transfer points at the Lisgar GO Station, Regional Road 25 / Highway 401 GO bus stop and Milton Crossroads at Walmart bus stop.	Physical infrastructure is likely not required. Increased costs to the “ad-hoc” taxi budget is possible due to with more service coverage. However, this is not expected with continuing depressed demand expected into 2021 due to the covid-19 pandemic.	N/A
8. Create website content on inter-regional transfer information	<ul style="list-style-type: none"> <li>– ActiVan and Communications staff time to create website content.</li> <li>– Assuming a Communications staff rate of \$51.86/hr and 30 hours of staff effort</li> </ul>	\$2500 for Communications staff effort and materials and supplies
9. Schedule transfer trips to conventional services based on their departure time information	This recommendation would require a slight increase in effort that should be easily achievable within current scheduling capacity.	N/A
<b>Update Booking Policy and Processes</b>		
10. Introduce weekend capacity to accept bookings, schedule trips and handle customer inquiries. Accept trip requests up to 3 hours before end of day and schedule night before instead of morning before	<ul style="list-style-type: none"> <li>– Hiring of multiple part-time dispatchers assuming the rate of \$28.33/hr, to be present until 8:00PM (3 hours before end of service day) on weekdays and from 7:00AM until 8:00PM on weekends to accept reservations, respond to customer inquiries and schedule trips booked for Sunday and Monday.</li> </ul>	\$65,000 per year in wages for a pool of part-time dispatchers
11. Reduce advanced booking notice policy from 30 days to 7 days and accept trip requests up to 3 hours before end of service day	<ul style="list-style-type: none"> <li>– ActiVan and Communications staff time to update and communicate new policy to customers.</li> <li>– Assuming a Communications staff rate of \$51.86/hr and 30 hours of staff effort.</li> </ul>	\$2500 for Communications staff effort and materials and supplies

## 7 SUMMARY AND NEXT STEPS

This report recommends the implementation of an in-house service delivery model and several other modifications to better align with the AODA. The in-house model will provide for a long-term and sustainable provision of ActiVan services. The model will best enable ActiVan to continue and further enhance its high level of customer and community satisfaction, flexibility of service delivery and minimization of organizational interfaces.

To better meet AODA requirements, eligibility and operational changes are recommended. In terms of eligibility, it is recommended to establish an appeals panel, develop an eligibility guide and to modify eligibility conditions that reflect neighbouring transit agencies. Operationally, the booking window is recommended to be modified to be between 7 days before service to 3 hours before the end of day on the day before service. Scheduling should also be conducted later to align with this booking window. To enhance transfer connections, it is recommended that new transfer points be established in Milton and Mississauga, education on neighbouring service be provided and booking/dispatch be coordinated. Ride Well of Wellington County should be engaged to facilitate transfers with that service. The establishment of these recommendations will help ActiVan meet the intent and requirements of the AODA.

The Mid-Term Directions Report will be presented to Town council for approval in September 2020. Prior to that meeting, the project team's attention will turn to Phase 2 of the Specialized Transit Plan and development of a long-term plan. Phase 2 will commence with the development of service standards. This will include significant public and stakeholder consultation that will be held throughout the fall. Other key components in the development of the long-term plan include ridership forecasting and service analysis. These processes will culminate in a Draft Final Directions Report in April 2021. Further public consultations in the winter of 2021 will be held to assess the draft with a finalized report expected in early spring of 2021.

The Mid-Term Directions report and its recommendations present changes that align with the long-term goals of the service and provide foundation from which a long-term plan can develop.

# APPENDIX 1- STAFF AND STAKEHOLDER ENGAGEMENT

Attendees (excluding LTRT staff)	Discussion Topics
<b>Town of Halton Hills internal stakeholder discussions</b>	
<b>June 4. 2020</b> <i>Town of Halton Hills Public Works- Fleet</i> Fleet Supervisor Transit Supervisor Manager of Transportation	<ul style="list-style-type: none"> <li>- Challenges and opportunities with current fleet and maintenance (with respect to costs and sustainability)</li> </ul>
<b>June 5. 2020</b> <i>Town of Halton Hills Asset Management</i> Senior Manager of Climate Change and Asset Management Asset Management Analyst Transit Supervisor Manager of Transportation	<ul style="list-style-type: none"> <li>- Climate change goals and objectives to be considered in the Specialized Transit Plan</li> </ul>
<b>June 8. 2020</b> <i>Hillview Active Living Centre (Georgetown and Acton)</i> Recreation Supervisor Transit Supervisor Manager of Transportation	<ul style="list-style-type: none"> <li>- Current challenges with seniors' access to transportation options</li> <li>- Key locations and cross boundary travel and connection to other specialized transportation agencies.</li> </ul>
<b>June 11. 2020</b> <i>Town of Halton Hills-Accessibility</i> Lead Customer Service Specialist Transit Supervisor Manager of Transportation	<ul style="list-style-type: none"> <li>- Accessibility specific challenges and opportunities to be considered in the Specialized Transit Plan</li> </ul>
<b>June 12. 2020</b> <i>Town of Halton Hills-Recreation Services</i> Manager of Recreational Services Transit Supervisor Manager of Transportation	<ul style="list-style-type: none"> <li>- Challenges and opportunities with respect to specialized transit users' access to recreation services facilities</li> </ul>
<b>Discovery interviews</b>	
<b>June 15.2020</b> <i>Scheduling/Service Design</i> Transit Supervisor Manager of Transportation	<ul style="list-style-type: none"> <li>- Scheduling efficiency including technologies used and the scheduling processes.</li> <li>- Monitoring or data analysis to inform scheduling.</li> <li>- Planning process for the allocation of vehicle service hours and shift design.</li> </ul>
<b>June 15.2020</b> <b>Finance &amp; Admin</b> Financial Analyst	<ul style="list-style-type: none"> <li>- Financial indicators and financial prioritization process</li> <li>- Organizational roles and structure</li> </ul>

Transit Supervisor Manager of Transportation	<ul style="list-style-type: none"> <li>- Human resources (Employee relations and training)</li> <li>- Collective Bargaining Agreement issues and capital projects</li> </ul>
<b>June 16. 2020</b> <i>Eligibility &amp; Registration</i> Transit Assistant Transit Supervisor Manager of Transportation	<ul style="list-style-type: none"> <li>- Eligibility challenges and opportunities to be considered in the Specialized Transit Plan.</li> <li>- Eligibility application, assessment and appeals process</li> <li>- Types of customers and policies and customer engagement.</li> </ul>
<b>June 16 &amp; 17. 2020</b> <i>Booking/Reservations &amp; Operations/Dispatch</i> Transit Assistant Transit Supervisor Manager of Transportation	<ul style="list-style-type: none"> <li>- Trip booking processes and technologies used</li> <li>- Undocumented policies and practices</li> <li>- TaxiSCRIP - utilization, type of customers</li> <li>- Challenges and opportunities to be considered in the Specialized Transit Plan include: <ul style="list-style-type: none"> <li>- Day of service procedures (e.g. schedule revisions, book out of buses, operator changes, pre and post trip inspection procedures)</li> <li>- Dispatch and incident management processes (same day trips, delays, vehicle breakdowns, customer incidents, etc.), technologies used</li> <li>- Cancellations (at door), no show and missed trips procedures</li> <li>- On-time performance</li> <li>- Fare payment processes/policies, on-board technology</li> </ul> </li> </ul>
<b>June 17. 2020</b> <i>Customer Service</i> Transit Supervisor Manager of Transportation	<ul style="list-style-type: none"> <li>- Customer complaint management/process</li> <li>- Technologies used and reporting</li> </ul>
<b>Accessibility Advisory Committee</b>	<ul style="list-style-type: none"> <li>- Due to covid-19, it was not possible to schedule a meeting with the Accessibility Advisory Committee to gather input. Instead, a presentation outlining the goals and objectives of the Specialized Transit Plan and associated questionnaire were emailed to members for input.</li> </ul>

## APPENDIX 2 – IMAGE SOURCES

- (1) TheIFP. (2017). Region's SPLIT program to provide discounted ActiVan services for eligible users. *TheIFP.ca*. Retrieved from <https://www.theifp.ca/community-story/7331599-region-s-split-program-to-provide-discounted-activan-services-for-eligible-users/>
- (2) TheIFP. (2016). Halton Hills ActiVan and Youth Taxi Scrip introduce new fares starting January. *TheIFP.ca*. Retrieved from <https://www.theifp.ca/news-story/7020401-halton-hills-activan-and-youth-taxi-scrip-introduce-new-fares-starting-january/>,
- (3) Van Ravens, M. (2018). Have your say: Town looking to develop 'Made-In-Halton-Hills' transit solution. *TheIFP.ca*. Retrieved from <https://www.theifp.ca/news-story/8097920-have-your-say-town-looking-to-develop-made-in-halton-hills-transit-solution/>
- (4) Town of Halton Hills. (2019). Retrieved from <https://www.facebook.com/TownOfHaltonHills/posts/donut-you-get-the-filling-these-activan-drivers-are-enjoying-this-treat-here-the/2945788302159518/>
- (5) Heck, A. (2018). "Its not a difficult thing to do", Burlington resident lays case for amalgamating paratransit across the region. *TheIFP.ca*. Retrieved from <https://www.theifp.ca/news-story/8870583-it-s-not-a-difficult-thing-to-do-burlington-resident-lays-case-for-amalgamating-paratransit-across-the-region/>