SUBJECT: Accessible Transit Services (ATS) Review - (PW05075a) - (City Wide)

RECOMMENDATION:
(a) That a Task Force be established to review improvements, look for efficiencies and make recommendations quarterly, to the General Manager of Public Works respecting Accessible Transit Services.

(b) That the Accessible Transit Services governance structure attached as Appendix A to Report PW05075(a), be approved for a period of three months upon Council approval, at which time the Accessible Transit Services Steering Committee will reconvene to determine the appropriateness of the new model and/or revise the model based on a report from the Task Force outlining their initial success or further recommendations.

(c) That the above results be incorporated into a competitive RFP process which will be compiled in 2007 with the approved vendor(s) beginning work in 2008.

(d) That the City program be re-branded which, in turn, would allow both DARTS and Vets the opportunity to individually brand their services.

(e) That there are to be no additional costs as a result of any changes made to the program.

(f) That any savings be applied to enhancing the service.

(g) That a Business Analyst (Trapeze software) be hired, subject to acceptance of this review (currently in Budget, awaiting conclusion of review).

(h) That the Director of Transit and the Manager of Transit Fare Administration & ATS be reaffirmed as Public Works staff representatives on the DARTS Board of Directors as non-voting members.

(i) That Transit staff continue to liaise with the Advisory Committee for Persons with Disabilities and the Seniors Advisory Committee to ensure these Advisory Committees have access to City staff regarding the City’s paratransit program.

(j) That the report prepared by iTans Consulting, attached hereto as Appendix B to Report PW05075(a), be received for information.
(k) That Outstanding Business Item M, as listed on the Public Works, Infrastructure & Environment Committee Agenda, be removed.

_______________________
Councillor Terry Whitehead
Chair
ATS Steering Committee

**EXECUTIVE SUMMARY:**

Council, at its meeting held July 13, 2005, approved staff’s recommendation to carry out a limited scope Operational Review of the Accessible Transportation Services (ATS) Program, and more specifically to undertake a peer review for the purpose of evaluating the potential for improvements in efficiency and effectiveness that could be achieved through variations in the level of City or private sector involvement in the current ATS program structure. This report includes the Consultant’s report and presents several recommendations to ensure the ATS program is structured in a way that provides the best service possible for the users of the program in the City of Hamilton.

**BACKGROUND:**

This report has City wide implications.

On July 13, 2005, Council approved the process as set out in report PW05075 (Appendix C) to carry out a limited scope Operational Review of the Accessible Transportation Services (ATS) Program.

A Steering Committee consisting of Councillor Whitehead (Chair), Councillors Collins, Merulla and Morelli, Scott Stewart, Don Hull and Paul Thompson was established to oversee the process. iTRANS Consulting was hired via the Public Works Roster to carry out the review.

During the process several issues arose, one of which was the relationship issue between ATS and DARTS; and DARTS and Vets. In order to ensure the process was transparent and equitable to all concerned parties, the structure of the Steering Committee was changed in that Scott Stewart, Don Hull and Paul Thompson were removed as “official” members and instead acted in the capacity of “resources” similar to DARTS and Vets representatives, and Connie Wheeler of the City Manager’s office was placed on the Committee to oversee the process.

The Steering Committee met on numerous occasions to review a variety of options as set out by iTRANS Consulting, and Scott Stewart in consultation with the Steering Committee, ATS, DARTs and Vets representatives.

The Steering Committee support the recommendations as set forth in this report.
A Task Force consisting of representation from all parties at all levels would enable the group to review improvements. It is recommended that this group report to the General Manager of Public Works on a quarterly basis. The Task Force would be comprised of:

- Transit Management,
- DARTS Management Representative,
- DARTS Driver,
- Vets Management Representative,
- Vets Driver,
- Representative from Dispatch/Scheduler Section, and
- Business Analyst.

During the first three month period, following approval of this report, the Task Force will focus its efforts in the area of scheduling to ensure the process is meeting the needs of DARTS, Vets, and the customer.

Other issues that could be addressed by the Task Force would include, but are not limited to, reservations, dispatch, further development of the Business Case regarding the City buying the buses utilized by DARTS; resolve, as part of the quarterly continuous improvement reviews, the issue around low floor and high floor buses; and consider the possibility of including the paratransit program with the conventional transit change over to Smart Card.

The restructuring of the governance model will provide for greater partnership opportunities to be encouraged with the City on a business basis with both service providers and with other levels of governments. The recommended model provides an opportunity for the external providers to be more accountable for their respective areas thus creating a more competitive environment. ATS will continue to maintain full administrative and policy responsibility for the paratransit service in conjunction with conventional transit. This would include Reservations, Scheduling, high level Customer Service and policy development. The changes in the recommended model would have DARTS and Vets reporting directly to Transit via the ATS Program and both would be responsible for their own Dispatch and day-to-day customer service (small “c” and small “s”).

The re-branding of the program will ensure the residents of the City of Hamilton recognize Accessible Transportation Services as a “City” program. It will also provide both DARTS and Vets the opportunity to individually brand their services.

There is a requirement for a Business Analyst to review the current Trapeze Software program and to oversee new developments, upgrades, etc.; and to ensure that the approved service plan is translated into effective service schedules, maintaining service quality, efficiency and cost effectiveness. Key duties and responsibilities will include modelling, costing and analysis of various service design alternatives; development and preparation of service quality measurements and reports; and liaison with stakeholders regarding service planning and problem resolution.
**ALTERNATIVES FOR CONSIDERATION:**

Recommended Model: It is evident based on the Consultant’s report and discussions held with the service providers (DARTS and VETS), and ATS program staff, that the current structure is not providing the best possible service to the users of paratransit in the City of Hamilton. The recommended model will see a change in the governance structure which, in turn, should alleviate some of the existing direct report issues. It allows for ATS Program Staff to manage both DARTS and VETS directly and provides for a more competitive, yet transparent and equitable business relationship between all three parties.

**FINANCIAL/STAFFING/LEGAL IMPLICATIONS:**

Financial: There will be no additional costs as a result of any changes made to the program.

Staffing: There are no staffing implications based on the proposed model, however following the three month review, should changes be recommended, Human Resources will be consulted.

Legal: There are no legal implications based on the proposed model, however following the three month review, should changes be recommended, both Legal and Human Resources will be consulted.

*Note:* The Contract between the City and DARTS expires in June 2008. Recommendations from the three month review will be incorporated into a competitive RFP process. Similarly, the Contract between DARTS and Vets expires in June 2008 and the City will have to revisit that Contract based on the recommendations from the Task Force.

**POLICIES AFFECTING PROPOSAL:**

The City’s Official Plan contains policies stipulating that the public transit system should be affordable, efficient, convenient and accessible, stressing easy access to activity areas.

There are no direct policies affecting the recommended model.

**RELEVANT CONSULTATION:**

Scott Stewart, General Manager of Public Works
Don Hull, Director of Transit
Paul Thompson, Manager, Transit Fare Administration & ATS
Mark Mindorff, General Manager of DARTS
Ron Vankleef, President, Veterans (Vets)
Senior’s Advisory Committee
Accessibility Committee for Persons with Disabilities
Blue Line Taxi
ATU
CUPE
iTrans Consulting Inc.
CITY STRATEGIC COMMITMENT:

By evaluating the “Triple Bottom Line”, (community, environment, economic implications) we can make choices that create value across all three bottom lines, moving us closer to our vision for a sustainable community, and Provincial interests.

Community Well-Being is enhanced. ☑ Yes ☐ No
The Transit Division is committed to providing an Accessible Transit Service for the residents of Hamilton with disabilities that is equivalent to regular public transit. A revised governance structure with improved integration and a structured management plan will benefit the key stakeholders and the users.

Environmental Well-Being is enhanced. ☐ Yes ☑ No

Economic Well-Being is enhanced. ☑ Yes ☐ No
In keeping with the City’s Official plan, it is expected that the public transit system will continue to be affordable, efficient, convenient and accessible while maintaining an efficient and effective system.

Does the option you are recommending create value across all three bottom lines? ☐ Yes ☑ No

Do the options you are recommending make Hamilton a City of choice for high performance public servants? ☐ Yes ☑ No
Recommended Governance Structure
Accessible Transit System (ATS) Service

Council

Public Works, Infrastructure and Environment (PWIE) Standing Committee

Minutes of meetings to PW GM to get item(s) on PWIE Agenda

Public Works Department

DARTS Board of Directors

Transit Division - ATS
Policy & Registration
Reservations
Scheduling
Customer Services

DARTS Dispatch
Ambulatory / Non-ambulatory

Vets Dispatch
Ambulatory
iTRANS Project Team

Project Manager          Dave Roberts
Technical Support       Errol Tan
Advisors                Bob Evans (independent consultant)
EXECUTIVE SUMMARY

In September of 2005, the City of Hamilton retained the services of iTRANS Consulting to undertake a review of Hamilton’s Accessible Transit Services (ATS), including comparisons with other Canadian specialized transit systems, in order to determine whether:

- There are additional opportunities to improve the efficiency and effectiveness of the current program.
- The efficiency and effectiveness of the ATS program can be improved through new partnerships with private sector transportation.

The purpose of this study is to provide the City with the information necessary to make an informed decision on how the functionality, financial and social performance of the City’s ATS program might be improved through variations or refinements of the current service delivery model based on the successful practices of other municipalities. Another goal of the study is also to provide the City with the cost and quality implications of the various service delivery options.

A. Analysis

Several analytical tasks were performed, primarily using data from the ATS program and peer system data from the Canadian Urban Transit Association, along with telephone interviews with most of the identified peer systems.

The analyses included:

- Performance and governance comparison with peer systems;
- Analysis of organization structure, including staffing level comparisons;
- Financial analysis of organizational models;
- Identification of current efficiency and effectiveness activities;
- Assessment of client satisfaction;
- Analysis of trip purpose.

The primary conclusions from the analysis tasks are as follows:

- Demand for specialized transit in the City of Hamilton is high but this is similar to several other systems that operate in large centres offering extensive services for persons with disabilities and the community.
- Demand is expected to continue increasing due to the aging population as well as the expansion of social programs such as workshops to help improve the quality of life for persons with disabilities.
- Hamilton’s unit costs and staffing levels are lower than most peer systems.
B. Development and Assessment of Organizational Options

Several service and organizational options were identified, based primarily on models used in most other larger and mid-sized Canadian specialized transit systems.

These were:
- Option 1 – Current structure
- Option 2a – City brokerage with contracted door-to-door operations
- Option 2a – City brokerage with DARTS contracted door-to-door operations
- Option 3 – DARTS administers and delivers all specialized services
- Option 4 – ATS (City) assumes delivery of all accessible services

Based primarily on industry experiences, our assessment concluded that Options 2a or 2b would be most likely to preserve current service quality and maintain good levels of cost effectiveness. They would also be the closest to the existing model (and even closer to the Calgary model) and would be the least disruptive. Their chief advantage over the existing arrangement, however, would be to strengthen the City’s role, its ability to be accountable for the service and the potential for greater coordination with conventional transit.

The main difference between Options 2a and 2b would be whether a contractual arrangement is negotiated with DARTS or whether an open bidding process is undertaken (the choice would need further consideration, although, if it is decided to negotiate with DARTS, a proposal call could always be an option if negotiations are not satisfactory).

C. Stakeholder Consultation

Consultation with the key stakeholders took place in the form of deputations to the project Steering Committee.

The stakeholders that made deputations are as follows:
- DARTS (Disabled and Aged Regional Transit System)
- ATU (Amalgamated Transit Union) representing current HSR employees
- CUPE (Canadian Union of Public Employees) representing DARTS employees
- Veterans Taxi (current sub-contractor)
- Blue Line Taxi
- ACPD (Advisory Committee for Persons with Disabilities)
- Seniors Advisory Committee
- ATS (City Transit Division)
The general theme underlying the presentations of the key stakeholders, especially the potential service operators (ATS, DARTS, taxi companies) and their unions, is that each could do the job better and more effectively than the others for various reasons.

While it was not within the mandate of this review to do the extensive research that would be required to prove or disprove any or all of these claims, we offered commentary based on general transit industry experiences, as follows:

- Bringing a contracted operation in-house invariably leads to higher costs, due primarily to higher wage rates, but also usually improves the quality of service, operations and maintenance due to direct City control of all aspects of the program.
- Contracted operations can offer a good quality service usually at less cost, but the contract requires the inclusion of required performance targets to ensure service standards established by the City are met and the City would need to dedicate sufficient resources to monitor the program to ensure contract compliance and satisfactory service quality.
- As most costs relate directly to wages, the potentials for overhead savings are fairly minimal, either from bring services in-house or changing contractors.
- There are benefits associated with keeping related functions within one organization, due to better communications, clear accountability and removing the ability to blame others for deficiencies.
- In our research, we did not see evidence of, or the likelihood for, separate funding sources for specialized transit from provincial ministries or other like sources. Nevertheless, there are ministry-funded transportation programs in some jurisdictions that are separate from the specialized transit system and these do lessen some of the demand that would otherwise be placed on specialized transit. Most of these programs, however, are long-standing and, although it would be worth pursuing by the City (ATS), there is no guarantee that ministries would be willing to add similar services or programs.
- In virtually all larger and mid-sized Canadian specialized transit systems, primarily because of the magnitude of the required budgets to operate these systems, the City or Region has ultimate responsibility for the service (also to its clientele and taxpayers) and actively administers the program, regardless of who (city staff or contractors) operates the service.
D. Overall Conclusions

Based on the analysis done for this review, the stakeholder consultations and general transit industry experiences, the following are the consultant’s overall conclusions to this review:

- Under any option, the City needs to have full administrative and policy responsibility and overall control of the service.
- Accessible transit should be organized and provided as a “family of services”, including accessible conventional transit and the various forms of specialized transit, including adopting policies and practices to encourage greater use of accessible conventional transit and, as a result, helping to lessen the demand pressures for specialized transit. This should be a major City objective as the costs associated with providing an accessible trip on the conventional transit service are in the order of 15-20% those of a specialized transit service trip.
- Even though there are problems with the existing organizational structure, we do not believe a major overhaul is needed but, rather, the current arrangements need to be further reviewed and refined, particularly in the area of clarifying the responsibilities of the various agencies and, especially, the lines of responsibility and accountability.
- There are legitimate roles to be played by all current stakeholders, namely:
  - The City’s ATS team needs to have administrative and overall responsibility for all accessible transit services, including both fully accessible conventional transit and specialized transit;
  - DARTS generally provides good quality core service at a reasonable cost and should continue to do so provided that clear lines of accountability are established;
  - Utilizing taxi companies, preferably under contract to ATS, to provide a portion of the trips should be undertaken where cost savings can be realized and the service is appropriate to customer needs.
- Further work should be done to review in detail the relationships between the various agencies and develop the required refinements needed to improve these relationships, clarify the lines of accountability and strengthen the organizational structure.
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- Appendix A: Peer System Interview Summaries
- Appendix B: Stakeholder Submissions
1. INTRODUCTION

In September of 2005, the City of Hamilton retained the services of iTRANS Consulting to undertake a review of Hamilton’s Accessible Transit Services (ATS), including comparisons with other Canadian specialized transit systems, in order to determine whether:

- There are additional opportunities to improve the efficiency and effectiveness of the current program.
- The efficiency and effectiveness of the ATS program can be improved through new partnerships with private sector transportation.

The purpose of this study is to provide the City with the information necessary to make an informed decision on how the functionality, financial and social performance of the City’s ATS program might be improved through variations or refinements of the current service delivery model based on the successful practices of other municipalities. Another goal of the study is also to provide the City with the cost and quality implications of the various service delivery options.
2. BACKGROUND

The City of Hamilton’s Accessible Transportation Services (ATS) program was established in the 1990’s to manage the overall delivery of specialized transit services for persons unable to use the conventional Hamilton Street Railway (HSR) public transit services due to a disability.

The current ATS program provides transit services to persons with disabilities through the following means:

- Accessible low-floor bus service is provided on designated trips on the majority of HSR’s bus routes. This service is operated by HSR and accommodates trips by persons in wheelchairs and other mobility devices in two designated self-serve spaces on each low-floor bus. Persons eligible for specialized service using conventional transit ride the bus free of charge. In 2004, there was an estimated 39,664 annual bus trips by persons with mobility devices.

- DARTS (Disabled and Aged Regional Transit System), a non-profit organization (NPO), provides a core service of prescheduled, door-to-door service for registered clients who meet the eligibility criteria for the service. It is intended to meet the transportation needs of persons with disabilities who are not able to use the other forms of available transit services in the City. In 2004, DARTS accommodated 256,051 annual trips for both ambulatory (19 percent) and non-ambulatory (81 percent) clients. In the same year, about 526,000 requests for trips were received. About 1.8 percent of these requests were not accommodated while about 25.1 percent were cancellations or no-shows.

- A subcontracted van service operated by Veterans Transportation, a private for-profit organization, also provides prescheduled door-to-door service to registered ambulatory clients who are able to access the mini-van vehicles used in this service. In 2004, the Veterans Transportation subcontracted service provided 131,432 annual trips.

- Taxi scrip service is made available to all ATS clients. Under the taxi scrip service, clients can purchase up to $80 worth of coupons per month at a 60% face value for use in paying for taxi services from any private for-profit taxi company based in the City of Hamilton. In 2004, approximately 165,000 annual trips were made using this service.

City Council sets the policies to establish goals and priorities, manage and meet demand (i.e. eligibility criteria, fares, service area, etc.). Policy administration for the ATS program is provided in-house within the City’s Transit Division. Functions such as customer service, client registration and scheduling are also undertaken in-house.

ATS and DARTS staff fall under two different labour unions: CUPE and ATU. Both unions were required to recertify following the amalgamation of the City of Hamilton and a subsequent vote resulted in the majority of transit employees, including staff members such as ATS (City) scheduling personnel, falling under ATU while DARTS employees remained with CUPE.

The existing agreement between the City and DARTS for the delivery of door-to-door specialized transit services has a 5-year term and expires in June 2008. The subcontracted van service operated by Veterans Transportation in agreement with DARTS also expires in June 2008.
3. ANALYSIS

3.1 Performance and Governance Comparison with other Canadian Systems

Using 2004 data from the specialized transit systems database maintained by the Canadian Urban Transit Association (CUTA), the team carried out an analysis to compare key performance indicators along with their respective organizational structures, cost breakdowns, wage rates and staffing levels. Knowledge gleaned from the CUTA database was also supplemented with information gathered through telephone interviews with representatives from the various peer systems indicated in the graphs in this section.

Exhibit 1: Peer Comparison of Registrants and Trips

![Graph showing peer comparison of registrants and trips for different transit systems.]

PUBLIC, NON-PROFIT, and PRIVATE categories are compared across various transit systems including Kitchener-Waterloo, Peel, York Region, Edmonton, Quebec, Calgary, Hamilton, London, Victoria, Winnipeg, and Ottawa.
Findings for Hamilton

- Moderately high registrants per capita and trips per registrant
- Combination results in significantly higher trips per capita (but about equal to Ottawa, Edmonton and Victoria)
- Higher usage due at least in part to demographics (regional centre) and “grandfathering” of some registrants such as Alzheimer’s patients
- No significant variation by organizational type (public, NPO, contracted)

Exhibit 2: Peer Comparison of Financial Indicators
Findings for Hamilton
- Cost effectiveness and revenue-cost ratio better than average of peers
- Net cost per capita higher than average, but this is due to higher number of trips per capita
- No significant variation by organizational type

3.2 Analysis of Organizational Structure

Again using 2004 data from the CUTA database, the team compared staffing levels of reservationists, schedulers and dispatchers for Hamilton and the peer systems. This information was also confirmed and supplemented with information gathered through telephone interviews with the peer system representatives. Summaries of these interviews are provided in Appendix A.

Exhibit 3: Peer Comparison of Staffing Levels

Findings for Hamilton
- Staffing levels better (lower) than average
- No significant variation by organizational type
3.3  **Financial Analysis of Organizational Models**

This part of the analysis reviewed the Hamilton ATS budget and broke down its elements to determine which portions would likely be affected by any potential organizational change and to what extent. The following summarizes the main elements of the ATS budget along with commentary regarding how each element might be affected:

**Exhibit 4: ATS Budget Breakdown**

<table>
<thead>
<tr>
<th></th>
<th>2004 Budget</th>
<th>Percent</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ATS (internal)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee-related</td>
<td>529,420</td>
<td>4.72 %</td>
<td>Directed affected by wage rates</td>
</tr>
<tr>
<td>Buildings &amp; Grounds</td>
<td>22,980</td>
<td>0.20 %</td>
<td>Minimally affected</td>
</tr>
<tr>
<td>Material &amp; Supplies</td>
<td>15,960</td>
<td>0.14 %</td>
<td>Minimally affected</td>
</tr>
<tr>
<td>Consulting/Contractual</td>
<td>2,800</td>
<td>0.02 %</td>
<td>Minimally affected</td>
</tr>
<tr>
<td><strong>Total ATS</strong></td>
<td>571,160</td>
<td>5.09 %</td>
<td></td>
</tr>
<tr>
<td><strong>DARTS</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee-related</td>
<td>5,149,750</td>
<td>45.88 %</td>
<td>Directed affected by wage rates</td>
</tr>
<tr>
<td>Vehicles</td>
<td>1,128,910</td>
<td>10.06 %</td>
<td>Directed affected by wage rates</td>
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<tr>
<td>Buildings &amp; Grounds</td>
<td>214,610</td>
<td>1.91 %</td>
<td>Minimally affected</td>
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<tr>
<td>Material &amp; Supplies</td>
<td>180,940</td>
<td>1.61 %</td>
<td>Minimally affected</td>
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<tr>
<td>Financial</td>
<td>100,380</td>
<td>0.89 %</td>
<td>Minimally affected</td>
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<tr>
<td><strong>Total DARTS</strong></td>
<td>6,774,590</td>
<td>60.35 %</td>
<td></td>
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<tr>
<td>Veterans Sub-Contract</td>
<td>1,594,440</td>
<td>14.20 %</td>
<td>Minimally affected</td>
</tr>
<tr>
<td>Capital Contributions</td>
<td>1,261,510</td>
<td>11.24 %</td>
<td>Not affected</td>
</tr>
<tr>
<td>Taxi Scrip</td>
<td>1,023,020</td>
<td>9.11 %</td>
<td>Not affected</td>
</tr>
<tr>
<td><strong>TOTAL EXPENSE</strong></td>
<td>11,224,720</td>
<td>100.00 %</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL REVENUE</strong></td>
<td>1,778,500</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>NET EXPENSE</strong></td>
<td>9,446,220</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The expense categories that would be primarily affected are those tied most closely to wage rates, namely, the employee-related costs (primarily drivers and other operations personnel) and vehicle maintenance costs, all of which collectively account for about 60 percent of total operating costs. The degree to which these costs would be affected would generally be proportional to the actual differences in wage and benefit rates, although other factors may temper this relationship to a small extent. Thus, a 10 percent average increase in wage rates would result in a cost impact in the order of $700,000 per year.
Most of the remaining cost elements would be expected to be minimally affected by potential organizational changes.

### 3.4 Identification of Current Efficiency and Effectiveness Activities

The following are current initiatives being undertaken within the ATS program to improve the efficiency and effectiveness of the ATS services:

- Cost-benefit analysis of high- versus low-floor fleet.
- New policies and services related to settlement with Ontario Human Rights Commission
- Revisions to eligibility policy and procedures
- Development of ATS reservation, scheduling and dispatching software
- Replacement of automated Telephone Information System (ATIS) including interactive Voice Response (IVR) module for ATS
- Recruitment to fill ATS Supervisor position

### 3.5 Assessment of Client Satisfaction

The consultant team reviewed all recorded customer contacts tracked by ATS from February 2004 to October 2005. Where possible, complaints were reviewed to ensure that they were valid. For example, complaints about the transit vehicles arriving late were considered invalid if the vehicles arrived within the \( \pm 15 \) minute pick-up window under which DARTS operates. The following are the highlights of this assessment:

**Complaints:**
- About 500 complaints per year (2004 - under 1 per 1000 trips) – in the mid-range compared to peer systems
- More than half (54\%) of all complaints related to booking trips (reservations, scheduling, same day scheduling – may be due to insufficient staff levels)
- 15\% were attributable to on-street service quality and reliability
- 16\% were related to driver conduct
- 9\% were related to the maintenance and cleanliness of vehicles

**Commendations:**
- Approximately 60 commendations per year
- 40\% commended the drivers
- 30\% commended on-street service quality

Further details from the assessment of client satisfaction are as follows:
### Exhibit 5: Breakdown of Customer Complaints

<table>
<thead>
<tr>
<th>Category of Complaint</th>
<th>No. of Complaints</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registration</td>
<td>4</td>
</tr>
<tr>
<td>Reservations</td>
<td>141</td>
</tr>
<tr>
<td>Scheduling – ATS</td>
<td>17</td>
</tr>
<tr>
<td>Scheduling – DARTS (same day)</td>
<td>255</td>
</tr>
<tr>
<td>Service</td>
<td>165</td>
</tr>
<tr>
<td>Driver Conduct – DARTS</td>
<td>171</td>
</tr>
<tr>
<td>Driver Conduct – Vets</td>
<td>14</td>
</tr>
<tr>
<td>Vehicle – DARTS</td>
<td>28</td>
</tr>
<tr>
<td>Vehicle – Vets</td>
<td>16</td>
</tr>
<tr>
<td>Others</td>
<td>145</td>
</tr>
</tbody>
</table>

![Pie chart showing the breakdown of customer complaints]

- Registration: 0.4%
- Reservations: 14.7%
- Scheduling – ATS: 1.8%
- Scheduling – DARTS (same day): 26.7%
- Service: 17.3%
- Driver Conduct – DARTS: 17.9%
- Driver Conduct – Vets: 1.5%
- Vehicle – DARTS: 2.9%
- Vehicle – Vets: 1.7%
- Others: 15.2%
### Exhibit 6: Breakdown of Customer Commendations

<table>
<thead>
<tr>
<th>Category of Complaint</th>
<th>No. of Complaints</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registration</td>
<td>1</td>
</tr>
<tr>
<td>Reservations</td>
<td>2</td>
</tr>
<tr>
<td>Scheduling – ATS</td>
<td>2</td>
</tr>
<tr>
<td>Scheduling – DARTS (same day)</td>
<td>5</td>
</tr>
<tr>
<td>Service</td>
<td>29</td>
</tr>
<tr>
<td>Driver Conduct – DARTS</td>
<td>38</td>
</tr>
<tr>
<td>Driver Conduct – Vets</td>
<td>2</td>
</tr>
<tr>
<td>Vehicle – DARTS</td>
<td>2</td>
</tr>
<tr>
<td>Others</td>
<td>17</td>
</tr>
</tbody>
</table>

- **Service**: 29.6%
- **Driver Conduct – DARTS**: 38.8%
- **Driver Conduct – Vets**: 2.0%
- **Vehicle – DARTS**: 2.0%
- **Schedule - DARTS (same day)**: 5.1%
- **Schedule - ATS**: 2.0%
- **Reservations**: 2.0%
- **Registration**: 1.0%
- **Other**: 17.3%
3.6 **Analysis of Trip Purpose**

iTRANS examined trip purpose data collected by ATS in 2004. A total of 500,160 trips to 230,337 different destinations were recorded in the trip purpose database.

The following summarizes the trip purpose analysis:
- 61% of all trip purposes are for medical and day programs (36% for medical) – this percentage is expected to continue growing due to an aging population;
- Single greatest trip destination is St. Joseph’s Hospital for dialysis (over 4% of total recorded trips).
- Not inconsistent with other systems, although many peer systems reviewed do not track trip purpose information.

**Exhibit 7: Breakdown by Trip Purpose**

![Breakdown by Trip Purpose Diagram]

- **Medical**: 36%
- **Day Programs**: 25%
- **Recreational**: 17%
- **Educational**: 7%
- **Seniors' Res**: 4%
- **Religious**: 4%
- **Shopping**: 6%
- **Business**: 1%
3.7 **Overall Conclusions of Analysis**

The primary conclusions from the analysis tasks are as follows:
- Demand for specialized transit in the City of Hamilton is high but this is similar to several other systems that operate in large centres offering extensive services for persons with disabilities and the community.
- Demand is expected to continue increasing due to the aging population as well as the expansion of social programs such as workshops to help improve the quality of life for persons with disabilities.
- Hamilton’s unit costs and staffing levels are lower than most peer systems.
4. DEVELOPMENT OF OPTIONS

Further to the results of the analyses described in the previous chapter, several service and organizational options were identified, based primarily on models used in most other larger and mid-sized Canadian specialized transit systems.

The development of options recognized that the City of Hamilton’s relationship with DARTS is different from most similar-sized systems, in that
- DARTS is an NPO with an exclusive arrangement
- The City owns the fleet, facilities and computer systems
- The City takes reservations and does scheduling
- DARTS (not the City) contracts with the taxi company

Calgary and Quebec City are the only other larger Canadian cities with an NPO operator.

4.1 Description of Options

The following options were developed:

Option 1 – No Change Current Structure

The current structure involves split responsibilities between the ATS (City Transit Division) staff and DARTS staff. The ATS group is responsible for the following:
- Overall administration, policy, budget management and contract administration
- Ownership of fleet and facilities
- Customer service
- Registration and determination of eligibility
- Receiving and booking reservations
- Day-before scheduling

DARTS is responsible for the following:
- Operations, including hiring and administration of drivers
- Dispatching, including same-day trip additions and schedule adjustments
- Administration of contract with Veterans Taxi
- Vehicle (small bus) maintenance (City owns the vehicles)
Option 2a – City Brokerage with Contracted Door-to-Door Services

- Provides a contractual arrangement that is administered by the City’s Transit Division, which retains responsibility for overall administration and policy.
- Issuing a Request for Proposals (RFP) would provide a competitive bid process to determine service provider interest and should result in relatively low operating costs.
- DARTS, taxi companies and others could bid and more than one service provider could be successful (e.g. DARTS and taxi companies).
- Consistent with a brokerage model, ATS would contract directly with taxi companies (or other service providers if appropriate).
- ATS continues to do scheduling and would allocate trips to the contractors based on cost effectiveness.
- ATS would be able to direct certain trip requests to accessible conventional transit where appropriate.
Option 2b – City Brokerage with DARTS Contracted Door-to-Door Services

- Similar to Option 2a, except DARTS would continue to deliver the Door-to-Door Services under a negotiated agreement
- Essentially the same as the model used in Calgary
- As with Option 2a, provides a contractual arrangement that is administered on behalf of the City by the Transit Division, which retains responsibility for overall administration and policy
- As with Option 2a, and consistent with a brokerage model, ATS would contract directly with taxi companies (or other service providers if appropriate) and would continue to do scheduling, allocating trips to the contractors based on cost effectiveness
Option 3 – DARTS Administers and Delivers All Specialized Services

- DARTS would assume responsibility for:
  - Coordination of all Accessible Services
  - Door-to-door reservations, scheduling, dispatch, drivers & maintenance
  - ATS Eligibility, Registration & Customer Service
  - Administration of Taxi Scrip Program
  - Administration of Veterans Taxi Contract
- Places responsibility for the delivery of all accessible services with an external “not-for-profit” organization
- Transfers reservations, scheduling and taxi scrip out of the City’s operations
- Transit Division’s (City Administration’s) role would be minimized or effectively eliminated

Option 4 – City Assumes Delivery of All Accessible Services

- Responsibility for all employees associated with the delivery of accessible services would rest with the Transit Division
- Transit Division would have added responsibilities in addition to current ATS functions
  - Operation of door-to-door service
  - Administration of Veterans Taxi Contract
4.2 **Assessment of Options**

The options were then assessed, again based on general transit industry experiences along with the following overall objectives:

- To deliver efficient accessible transit services
- To encourage a family of transit services that maximizes resources
- To meet client needs cost-effectively
- To provide a high quality service
- To increase spontaneity of travel

**Option 1 – Current Structure**

- Separates the door-to-door (DARTS) service from the planned, fully-accessible conventional transit service (HSR), which lessens the potential for better integration of all accessible transit services
- Opens the door for separate priorities for the delivery of accessible services, which could be in conflict with one another and not necessarily consistent with overall City objectives
- Interests of the City and the existing Contractor are often at variance
- Delivery of a coordinated service that includes various options is inhibited.
Option 2a – Contracted Door-to-Door Services (open to bids by DARTS and others)

- Maintains overall administrative policy within the City, which supports the “family of service” delivery concept
- Probably more cost-effective than a City-operated system due to lower direct operating costs from a contractor
- ATS scheduling role would allow determination of the most cost effective allocation of trips to the various contractors, including directing certain trip requests to accessible conventional transit where appropriate (and increasing overall capacity as a result)
- Provides an “arms-length” relationship with the employees who are delivering the service
- Vehicle maintenance may be compromised if incentives/disincentives are not included in the Contract
- Service quality control may be more difficult than with a City-operated System

Option 2b – DARTS Contracted Door-to-Door Services

- Like Option 2a, maintains overall administrative policy within the City, which supports the “family of service” delivery concept, and gives the City the day-to-day ability to schedule service and allocate trips in the most cost effective manner
- Permanent arrangement with DARTS would likely provide more stability and service quality consistency, but may not be as cost effective as an open bidding approach, although it would still be more cost-effective than a City-operated system
- Like Option 2a, it provides an “arms-length” relationship with employees delivering the service, requires maintenance incentives/disincentives in the Contract and will require some effort to ensure service quality control compared to a City-operated System

Option 3 – DARTS Assumes Delivery of All Accessible Services

- Places full responsibility for the delivery of all accessible services (including reservations, scheduling and taxi scrip) with an external “not-for-profit” organization
- Should be reasonably cost effective and would provide economies of scale by having all functions under one roof
- Effective elimination of Transit Division’s (City Administration’s) role would not provide the control the City Administration should have in delivering these important services

Option 4 – City Assumes Delivery of All Accessible Services

- Enables the city to assume control of day-to-day operations and delivery of accessible services
- Creates the opportunity for higher quality service, operations, vehicle cleanliness & maintenance
- Supports the “family of service” concept
- Would most likely be the highest cost of any option by a considerable margin, due primarily to anticipated higher wage rates and pressures for parity between specialized transit and conventional transit operators
- Higher costs could limit City’s fiscal ability to expand service and meet growing demand
4.3 Overall Conclusions of Options Assessment

Options 2a or 2b would be most likely to preserve current service quality and maintain good levels of cost effectiveness. They would also be the closest to the existing model (and even closer to the Calgary model) and would be the least disruptive. Their chief advantage over the existing arrangement, however, would be to strengthen the City’s role, its ability to be accountable for the service and the potential for greater coordination with conventional transit.

The main difference between Options 2a and 2b would be whether a contractual arrangement is negotiated with DARTS or whether an open bidding process is undertaken (the choice would need further consideration, although, if it is decided to negotiate with DARTS, a proposal call could always be an option if negotiations are not satisfactory).
5. STAKEHOLDER CONSULTATION

Consultation with the key stakeholders took place in the form of deputations to the project Steering Committee. The full presentations or submissions are in Appendix B.

5.1 Stakeholder Presentation Summaries

The key points are summarized as follows:

DARTS

- The current structure and governance is not working and is not sustainable
- Return reservations, scheduling and customer services to DARTS, including responsibility for Trapeze applications
- Service would be more cost effective if more ambulatory rides were added, which would also have additional savings if more use were made of smaller vehicles
- Should seek funding support from province to support transportation for their programs – rides for provincial programs cost $3 million (other municipalities are receiving funding from MOH). Alternatively, agencies should pay a premium fee for service.
- More technical support, especially in scheduling, could raise productivity from 2 trips per hour to 2.5 trips per hour, worth an estimated $600,000.
- Reduce pre-booked (subscription) ride levels for passengers not in programs, which will reduce cancellations but will increase reservation calls for casual rides
- Increase capacity by improving the timeliness of reporting cancellations (e.g. 40 passengers cancelled 7000 times, a value of $168,000)
- DARTS is negotiating improved shift assignments and is targeting $100,000 in lower WSIB claims
- Independent leasing of sub-contract vehicles (as opposed to paying vehicle costs to the sub-contractor) could save $600,000
Amalgamated Transit Union (ATU)

- Strongly believes that in-house is the best choice for the City and service users and would provide the best service at the lowest cost and would guarantee quality and frequency of service.
- Savings would be realized by eliminating duplication of service ie: communications, customer service, better employee training, better qualified staff, better utilization of staff, shared facilities, consistent maintenance standard, cleaning and fuelling through cross-utilization of resources; also, buses could be used for both ATS and regular service, such as rural HSR routes.
- City has invested resources in developing experienced workers at HSR and by bringing ATS in-house can better utilize their skills.
- An in-house contract will allow the City flexibility to pursue items such as: integration of services, smart growth, alternate fuels, expand service to rural areas without higher costs of profit margin to third party contractor.
- Direct control by City Managers would improve accountability and would ensure quick responses to complaints.

Canadian Union of Public Employees (CUPE)

- Return scheduling to DARTS - scheduling has deteriorated since transfer to the City
- Low employee morale
- Invest in technology, GPS/AVL to improve efficiency
- City can achieve efficiencies through additional services provided by the City such as training
- For-profit taxi service should be provided by the NPO, which would result in a savings

Veterans Taxi

- Cost savings if VETS provided all ATS - scheduling, dispatching, service delivery
- Savings through enhanced role of VETS in scheduling
- Return scheduling from DARTS to VETS for ambulatory
- Reduce duplicated services between DARTS and VETS

Blue Line Taxi

- Should be a fair competitive bid for the van taxi ambulatory service. Currently a monopoly.
- More variety in fleet – could double the capacity of current DARTS fleet using smaller vehicles.
- Can provide a higher quality of service at a lower cost than current contractor
- Explore alternate fare payment methods – metered rate, fare by distance, etc.
Advisory Committee for Persons with Disabilities

- Pursue alternate forms of funding
- Should be a greater involvement of ACPD in ATS
- Premium fare for some services
- Benchmark service levels
- Increase service levels to same as conventional transit
- Harmonize ATS and HSR fare policies
- ATS part of overall strategic transportation system
- Composition of DARTS board should include 50% people with disabilities

Seniors Advisory Committee

- Improve scheduling (multiple vehicles showing up at single location for multiple clients)
- Good value for money, could look at a 2-tier fare system based on ability to pay
- Need to find alternate sources of funding
- Seniors and the Committee should have more input on policy

Transit Division (ATS Program)

- DARTS has grown to a large organization and the $12.5 million operating budget is larger than most mid-sized Canadian conventional transit systems
- The overall program has been under recurring controversy and program reviews over many years, with significant turnover of DARTS Board members and managers and difficulty at both DARTS and ATS in recruiting qualified management staff
- Relationship conflicts between DARTS and City staff has been ongoing and adversely impacts program delivery
- ATS program will continue to face high cost pressures, primarily due to ever-increasing demand pressures
- With DARTS facing collective agreement negotiations, there is potential for the City to be deemed a common employer, which could result in large wage increases associated with parity with City (HSR) operators
- ATS staff disagree with claims of other stakeholders in cost saving potentials if they were to be given a greater role (see ATS presentation in Appendix B)
- The current hybrid model must continue to evolve toward one of the options identified in this review
ATS staff recommended that the program move towards the Calgary Model (similar to Option 2b above) with the following characteristics:

- Retain DARTS (NPO) as core service provider
- Greater use of private contracted service delivery
- ATS program accountable to Public Works, including:
  - Director of Transit as permanent Vice-Chair and voting member of DARTS Board
  - Manager of ATS (City) also as a voting member
  - Discontinuation of a City Councillor membership on the Board
  - Appointments of DARTS Board by Council’s ABC appointments sub-committee
- Create trip “brokerage” structure, with a City Brokerage Manager with dual reporting to the City and the DARTS Board
- Re-bundle reservations, scheduling and dispatching
- Create a Strategic Plan within 6 months that defines full roles and accountabilities, including structure of private contractor participation

ATS staff have also identified a number of characteristics and circumstances unique to Hamilton that directly impact the existing specialized transit service delivery:

- The collective bargaining agreement in place for the DARTS specialized transit service is restrictive and does not allow straight 10/12 hour shifts as is the norm in many other systems
- The presence of two different labour unions and bargaining agreements (such as those related to wage rates) in place adds complication to the governance processes for specialized transit services. Any decision to restructure the ATS organization will have to take into consideration the resulting wage differences since, for example, the DARTS operators would come under the ATU collective agreement if the DARTS services were to be brought in-house. The current ATU agreement with HSR specifies higher wage rates compared to CUPE. As a comparison, the current top wage rate for DARTS drivers is approximately equal to the lowest wage bracket for HSR’s conventional transit operators.
- Revisions are being made to Council’s eligibility policy due to a recent ruling by the Ontario Human Rights Commission and the subsequent settlement approved by Council in October 2004. This will lead to further demand pressures for increased service.

5.2 Response to Stakeholder Presentations

The general theme underlying the presentations of the key stakeholders, especially the potential service operators (ATS, DARTS, taxi companies) and their unions, is that each could do the job better and more effectively than the others for various reasons. While it was not within the mandate of this review to do the extensive research that would be required to prove or disprove any or all of these claims, we can offer some commentary based on general transit industry experiences, as follows:

- Bringing a contracted operation in-house invariably leads to higher costs, due primarily to higher wage rates, but also usually improves the quality of service, operations and maintenance due to direct City control of all aspects of the program.
- Contracted operations can offer a good quality service usually at less cost, but the contract requires the inclusion of required performance targets to ensure service standards
established by the City are met and the City would need to dedicate sufficient resources to monitor the program to ensure contract compliance and satisfactory service quality.

- As most costs relate directly to wages, the potentials for overhead savings are fairly minimal, either from bring services in-house or changing contractors.
- There are benefits associated with keeping related functions within one organization, due to better communications, clear accountability and removing the ability to blame others for deficiencies.
- In our research, we did not see evidence of, or the likelihood for, separate funding sources for specialized transit from provincial ministries or other like sources. Nevertheless, there are ministry-funded transportation programs in some jurisdictions that are separate from the specialized transit system and these do lessen some of the demand that would otherwise be placed on specialized transit. Most of these programs, however, are long-standing and, although it would be worth pursuing by the City (ATS), there is no guarantee that ministries would be willing to add similar services or programs.
- In virtually all larger and mid-sized Canadian specialized transit systems, primarily because of the magnitude of the required budgets to operate these systems, the City or Region has ultimate responsibility for the service (also to its clientele and taxpayers) and actively administers the program, regardless of who (city staff or contractors) operates the service.
6. CONCLUSIONS

Based on the analysis done for this review, the stakeholder consultations and general transit industry experiences, we offer the following overall conclusions to this review:

- Under any option, the City needs to have full administrative and policy responsibility and overall control of the service.
- Accessible transit should be organized and provided as a “family of services”, including accessible conventional transit and the various forms of specialized transit, including adopting policies and practices to encourage greater use of accessible conventional transit and, as a result, helping to lessen the demand pressures for specialized transit. This should be a major City objective as the costs associated with providing an accessible trip on the conventional transit service are in the order of 15-20% those of a specialized transit service trip.
- Even though there are problems with the existing organizational structure, we do not believe a major overhaul is needed but, rather, the current arrangements need to be further reviewed and refined, particularly in the area of clarifying the responsibilities of the various agencies and, especially, the lines of responsibility and accountability.
- There are legitimate roles to be played by all current stakeholders, namely:
  - The City’s ATS team needs to have administrative and overall responsibility for all accessible transit services, including both fully accessible conventional transit and specialized transit;
  - DARTS generally provides good quality core service at a reasonable cost and should continue to do so provided that clear lines of accountability are established;
  - Utilizing taxi companies, preferably under contract to ATS, to provide a portion of the trips should be undertaken where cost savings can be realized and the service is appropriate to customer needs.
- Further work should be done to review in detail the relationships between the various agencies and develop the required refinements needed to improve these relationships, clarify the lines of accountability and strengthen the organizational structure.
Appendix A

Peer System Interview Summaries
HAMILTON ATS – PEER SYSTEM INTERVIEWS (Hamilton)

Organizational Comparison Data – For each of the following:

<table>
<thead>
<tr>
<th>Position</th>
<th>Number</th>
<th>Wage Rate</th>
<th>Employer</th>
<th>Union affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Full Time</td>
<td>Part Time</td>
</tr>
<tr>
<td>Reservationists</td>
<td>4</td>
<td>19.38</td>
<td>City of Hamilton</td>
<td>ATU</td>
</tr>
<tr>
<td>Schedulers</td>
<td>2</td>
<td>23.94</td>
<td>City of Hamilton</td>
<td>ATU</td>
</tr>
<tr>
<td>Dispatchers</td>
<td>9 1</td>
<td>15.14/hr</td>
<td>Darts</td>
<td>Cupe 5167</td>
</tr>
<tr>
<td>Operators</td>
<td>54 45</td>
<td>18.76/hr</td>
<td>Darts</td>
<td>Cupe 5167</td>
</tr>
<tr>
<td>Inspectors/Operations Supervisors</td>
<td>2</td>
<td>40,000 / year to 42,000 / year</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintenance Employees</td>
<td>9 1</td>
<td>13.35/hr to 27.40/hr</td>
<td>Darts</td>
<td>Cupe 5167</td>
</tr>
<tr>
<td>Other Administrative staff (non-management)</td>
<td>8</td>
<td>14.70 / hr to 23.95</td>
<td>City of Hamilton</td>
<td>ATU Cupe 5167</td>
</tr>
</tbody>
</table>

Eligibility Criteria:

The following is an excerpt from a report to the Transportation Services Committee in July of 1997 - subject "Review of Accessible Transportation Services Eligibility Policy

All D.A.R.T.S. clients registered for service prior to October 1995 are "grandfathered” and may continue to access D.A.R.T.S. service. This grandfathering does not discriminate between non-ambulatory and ambulatory clients. They may also access the Regional Taxi Scrip program.
New applicants:
- Persons with a disability who are unable to use conventional transit due to the nature of their disability, and who use a wheelchair, scooter or walker, or who require kidney dialysis, or who are diagnosed with Alzheimer, are eligible for D.A.R.T.S. service and the Regional Taxi Scrip program.
- Persons with a disability who are unable to use conventional transit due to the nature of their disability but who do not use a wheelchair, scooter or walker, do not require kidney dialysis or are not diagnosed with Alzheimer, are eligible for the Regional Taxi Scrip program only; they are not eligible for D.A.R.T.S. service.

As well, the top of the application form states:

Accessible Transportation Services are intended for persons who are unable to:
- Climb or descend steps used in conventional transit facilities (e.g. bus steps), or
- Walk a distance of 175 metres (approximately 600 feet), or
- Comprehend surroundings, instructions and directions in the use of public transit with safety.

Complaints and Commendations
- Number of each per year
- Breakdown by type

Trip Purpose
- Breakdown by type
- Has trip purpose pattern changed in recent years (e.g. higher growth in certain areas due to downloading or downscaling by other agencies)

Use of Non-Dedicated Service (if applicable)
- How is non-dedicated service used (e.g. peaks only, all or some ambulatory trips)
- Could non-dedicated service be used more

Sources of funding
- Identification of any non-municipal funding
- Percent from any external source

Governance
- Type of organization (municipal, NPO, contracted)
- If NPO, to whom does the NPO report, and how (link to Council)

Advantages and Disadvantages of Current Organizational Structure (municipal, NPO, contracted)
### Organizational Comparison Data – For each of the following:

<table>
<thead>
<tr>
<th>Position</th>
<th>Number.</th>
<th></th>
<th>Wage Rate</th>
<th>Employer</th>
<th>Union affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Full Time</td>
<td>Part Time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reservationists</td>
<td>13</td>
<td>12 on-call</td>
<td>n/a</td>
<td>Access Calgary</td>
<td>ATU 583</td>
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<tr>
<td>Schedulers</td>
<td>5</td>
<td>2 on-call</td>
<td>n/a</td>
<td>Access Calgary</td>
<td>ATU 583</td>
</tr>
<tr>
<td>Dispatchers</td>
<td>4</td>
<td>1 on-call</td>
<td>n/a</td>
<td>Access Calgary</td>
<td>Union-exempt</td>
</tr>
<tr>
<td>Operators</td>
<td>Handibus (NPO): 122</td>
<td>38 (64 hours bi-weekly max); 14 casual (48 hours max bi-weekly)</td>
<td>Fulltime: $18.26-$19.97 per hour</td>
<td>Handibus</td>
<td></td>
</tr>
<tr>
<td>Inspectors/Operations Supervisors</td>
<td>3 resource planners; 2 field supervisors</td>
<td>n/a</td>
<td>Access Calgary</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintenance Employees</td>
<td>9</td>
<td></td>
<td>$23.40-$25.10 per hour</td>
<td>Access Calgary</td>
<td>ATU 583</td>
</tr>
<tr>
<td>Other Administrative staff (non-management)</td>
<td>5 mobility specialists; 6 clerical; 2 customer service; 1 secretary to manager</td>
<td>n/a</td>
<td>Access Calgary</td>
<td>CUPE 38</td>
<td></td>
</tr>
</tbody>
</table>
Complaints and Commendations:
- Number of each per year: 2005 to date: 159 complaints; 131 commendations.
- Breakdown by type: Of the 159 complaints, 29 about driving behavior; 48 about driver attitude; 25 about lateness; 57 about policy. 50-50 split of complaints between taxi services (provide 40% of trips) and Handibus (provide about 60% of trips).

Eligibility Criteria:
They have seasonal and functional eligibility criteria in place. For example, some can use specialized transit unconditionally; others can only use specialized transit under certain conditions such as in winter, etc.

Trip Purpose
- Breakdown by type (e.g. medical vs. day programs vs. recreational): 2004: 31% personal; 27.5% work/vocational; 12.5% educational; 28.9% medical. In 2005 to date: 28.9% personal; 32% work/vocational; 10.5% educational; 28.5% medical.
- Has trip purpose pattern changed in recent years (e.g. higher growth in certain areas due to downloading or downscaling by other agencies)? They have noticed increase in community-based programs in past few years such as day centres. Also, there are now more off-site locations unlike the past. Previously, the customer would be dropped off at one location where they would spend all day. Now, they typically travel to several locations for different programs throughout the day which means additional trips for the specialized transit system.

Use of Non-Dedicated Service (if applicable)
- How is non-dedicated service used (e.g. peaks only, all or some ambulatory trips) Mixed.
- Is non-dedicated service fully accessible? No. 2 companies now provide taxi services; one (Checker Transportation) provides non accessible sedans/minivans while the other has accessible vehicles.
- Could non-dedicated service be used more?

Sources of funding
- Identification of any non-municipal funding: City covers operating expenses. Portion of capital funds are collected through fund-raising events. Fundraising has collected an average of $850,000 per year in last 5 years.
- Percent from any external source

Governance
- Type of organization (municipal, NPO, contracted): All 3.
- If NPO, to whom does the NPO report, and how (what is the link to Council)? Handibus (the Calgary NPO) has volunteer board of directors. They do not report to the City.

Advantages and Disadvantages of Current Organizational Structure (municipal, NPO, contracted):
Dedicated service is not tendered whereas the non-dedicated service is tendered out.
### HAMILTON ATS – PEER SYSTEM INTERVIEWS (Edmonton)

#### Organizational Comparison Data – For each of the following:

<table>
<thead>
<tr>
<th>Position</th>
<th>Number.</th>
<th>Wage Rate</th>
<th>Employer</th>
<th>Union Affiliation</th>
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</thead>
<tbody>
<tr>
<td></td>
<td><strong>Full</strong></td>
<td><strong>Part</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Time</td>
<td>Time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reservationists</td>
<td>6</td>
<td>17</td>
<td>$18.14-$22.73 per hour</td>
<td>Work for municipality</td>
</tr>
<tr>
<td>Schedulers</td>
<td>7</td>
<td>10</td>
<td>$19.37-$24.27 per hour</td>
<td>Work for municipality</td>
</tr>
<tr>
<td>Dispatchers</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Operators</td>
<td>Lift van – current (Nov. 29) 102</td>
<td>Lift van – current (Nov. 29) 10</td>
<td>$14.35-$19.34 per hour</td>
<td>Work for municipality</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- budget calls for 112</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inspectors/Operations Supervisors</td>
<td>Service Unit Coordinators – 5 Supervisors – 2</td>
<td>n/a</td>
<td>$19.37-$24.27/hr</td>
<td>Work for Municipality</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintenance Employees</td>
<td>9</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Administrative staff (non-management)</td>
<td>31</td>
<td>Various wages</td>
<td>Work for municipality</td>
<td>Union 52</td>
</tr>
</tbody>
</table>

Answer the following:
- Number of employees
- Wage Rate
- Who do they work for (municipality, NPO, contractor)?
- Union affiliation (if any)
### Complaints and Commendations

- Number of each per year
- Breakdown by type

<table>
<thead>
<tr>
<th>Complaints</th>
<th>2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>All complaint categories total</td>
<td>1009</td>
</tr>
<tr>
<td>Lift-Equipped Vehicle Total</td>
<td>431</td>
</tr>
<tr>
<td>Contractors</td>
<td>166</td>
</tr>
<tr>
<td>City Drivers</td>
<td>265</td>
</tr>
<tr>
<td>/10,000 trips</td>
<td>8.6</td>
</tr>
<tr>
<td>Sedan &amp; Passenger Van total</td>
<td>396</td>
</tr>
<tr>
<td>Sedan</td>
<td>344</td>
</tr>
<tr>
<td>Passenger Van</td>
<td>52</td>
</tr>
<tr>
<td>Contractors</td>
<td>225</td>
</tr>
<tr>
<td>City Drivers</td>
<td>171</td>
</tr>
<tr>
<td>/10,000 trips</td>
<td>13.5</td>
</tr>
<tr>
<td>Contract / City driver total</td>
<td>827</td>
</tr>
<tr>
<td>Contractors</td>
<td>391</td>
</tr>
<tr>
<td>City Drivers</td>
<td>436</td>
</tr>
<tr>
<td>/10,000 trips</td>
<td>9.7</td>
</tr>
<tr>
<td>DATS Administration total</td>
<td>189</td>
</tr>
<tr>
<td>/10,000 trips</td>
<td>2.2</td>
</tr>
<tr>
<td>Complaints</td>
<td>2004</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>1. No Trip (dispute) total</td>
<td>137</td>
</tr>
<tr>
<td>Passenger Van</td>
<td>4</td>
</tr>
<tr>
<td>Lift-Equipped Vehicle</td>
<td>75</td>
</tr>
<tr>
<td>Sedan</td>
<td>58</td>
</tr>
<tr>
<td>2. Late/Early Drop-Off total</td>
<td>94</td>
</tr>
<tr>
<td>Passenger Van</td>
<td>4</td>
</tr>
<tr>
<td>Lift-Equipped Vehicle</td>
<td>63</td>
</tr>
<tr>
<td>Sedan</td>
<td>27</td>
</tr>
<tr>
<td>3. Excessive Travel Time total</td>
<td>5</td>
</tr>
<tr>
<td>Passenger Van</td>
<td>0</td>
</tr>
<tr>
<td>Lift-Equipped Vehicle</td>
<td>2</td>
</tr>
<tr>
<td>Sedan</td>
<td>3</td>
</tr>
<tr>
<td>4. Late/Early Pick-Up total</td>
<td>101</td>
</tr>
<tr>
<td>Passenger Van</td>
<td>8</td>
</tr>
<tr>
<td>Lift-Equipped Vehicle</td>
<td>43</td>
</tr>
<tr>
<td>Sedan</td>
<td>50</td>
</tr>
<tr>
<td>5. Lack of Proper Assistance</td>
<td>103</td>
</tr>
<tr>
<td>Passenger Van</td>
<td>9</td>
</tr>
<tr>
<td>Lift-Equipped Vehicle</td>
<td>45</td>
</tr>
<tr>
<td>Sedan</td>
<td>49</td>
</tr>
<tr>
<td>6. Discourteous</td>
<td>93</td>
</tr>
<tr>
<td>Passenger Van</td>
<td>12</td>
</tr>
<tr>
<td>Lift-Equipped Vehicle</td>
<td>46</td>
</tr>
<tr>
<td>Sedan</td>
<td>35</td>
</tr>
<tr>
<td>7. Safety Concerns</td>
<td>139</td>
</tr>
<tr>
<td>Passenger Van</td>
<td>8</td>
</tr>
<tr>
<td>Lift-Equipped Vehicle</td>
<td>84</td>
</tr>
<tr>
<td>Sedan</td>
<td>47</td>
</tr>
<tr>
<td><strong>Total Concerns/ 10,000 trips</strong></td>
<td>1.6</td>
</tr>
<tr>
<td>8. Failure to Follow Policies</td>
<td>77</td>
</tr>
<tr>
<td>Passenger Van</td>
<td>4</td>
</tr>
<tr>
<td>Lift-Equipped Vehicle</td>
<td>35</td>
</tr>
<tr>
<td>Sedan</td>
<td>38</td>
</tr>
<tr>
<td>9. Failure to Follow Run-Sheet</td>
<td>78</td>
</tr>
<tr>
<td>Passenger Van</td>
<td>7</td>
</tr>
<tr>
<td>Lift-Equipped Vehicle</td>
<td>37</td>
</tr>
<tr>
<td>Sedan</td>
<td>34</td>
</tr>
</tbody>
</table>
Eligibility Criteria
Inability to use regular transit due to a physical or cognitive disability, and 16 years of age and older, and citizen of Edmonton.

Trip Purpose
DATS does not enquire about purpose of trip. We schedule approximately 55% of all trips into the weekday peak periods when most work, education and medical trips take place.
- Breakdown by type (e.g. medical vs. day programs vs. recreational)
- Has trip purpose pattern changed in recent years (e.g. higher growth in certain areas due to downloading or downscaling by other agencies)?

Use of Non-Dedicated Service (if applicable) N/A
- How is non-dedicated service used (e.g. peaks only, all or some ambulatory trips)
- Is non-dedicated service fully accessible?
- Could non-dedicated service be used more?

Sources of funding municipal tax levy and farebox
- Identification of any non-municipal funding
- Percent from any external source

Governance
- Type of organization (municipal, NPO, contracted) municipal
- If NPO, to whom does the NPO report, and how (what is the link to Council)?

Advantages and Disadvantages of Current Organizational Structure (municipal, NPO, contracted)
**HAMILTON ATS – PEER SYSTEM INTERVIEWS**  
(Kitchener-Waterloo)

**Organizational Comparison Data – For each of the following:**

<table>
<thead>
<tr>
<th>Position</th>
<th>No.</th>
<th>Wage Rate</th>
<th>Employer</th>
<th>Union affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Full Time</td>
<td>Part Time</td>
<td></td>
</tr>
<tr>
<td>Reservationists</td>
<td>4</td>
<td>$21.46 per hour</td>
<td>Grand-River Transit</td>
<td>CAW</td>
</tr>
<tr>
<td>Schedulers</td>
<td>2</td>
<td>Annual $69,000</td>
<td>Grand-River Transit</td>
<td>Non-union</td>
</tr>
<tr>
<td>Dispatchers</td>
<td></td>
<td>Same position as reservationists</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>Operators</td>
<td>26</td>
<td>$21.46 per hour</td>
<td>Grand-River Transit</td>
<td>CAW</td>
</tr>
<tr>
<td>Inspectors/Operations Supervisors</td>
<td>5</td>
<td>$69,000</td>
<td>Grand-River Transit</td>
<td>Non-Union</td>
</tr>
<tr>
<td>Maintenance Employees</td>
<td></td>
<td>None; maintenance contracted out ($300,000 per year)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Administrative staff (non-management)</td>
<td>3</td>
<td>$18.79</td>
<td></td>
<td>CUPE</td>
</tr>
</tbody>
</table>

**Complaints and Commendations:**
- Number of each per year: Do not track.
- Breakdown by type:

**Eligibility Criteria:**
Standard definition according to MTO.

**Trip Purpose**
- Breakdown by type (e.g. medical vs. day programs vs. recreational): Do not track
- Has trip purpose pattern changed in recent years (e.g. higher growth in certain areas due to downloading or downscaling by other agencies)?
Use of Non-Dedicated Service (if applicable)
- How is non-dedicated service used (e.g. peaks only, all or some ambulatory trips)
- Is non-dedicated service fully accessible? About 50%-50% in the North; 60% contracted-40% dedicated in the south. 3,000 taxi scrip rides a month.
- Could non-dedicated service be used more? Doesn’t think so because of the union environment.

Sources of funding
- Identification of any non-municipal funding: None, all municipal.
- Percent from any external source: n/a

Governance
- Type of organization (municipal, NPO, contracted): Door-to-door is municipal run, taxi service contracted out. No NPO
- If NPO, to whom does the NPO report, and how (what is the link to Council)? No NPO

Advantages and Disadvantages of Current Organizational Structure (municipal, NPO, contracted):
Better control after bringing DARTS service in-house. They used to have NPO 5 years ago. Happy with services, despite higher costs. Current governance structure allows them to utilize other labour resources within the City.
# HAMILTON ATS – PEER SYSTEM INTERVIEWS (London)

## Organizational Comparison Data – For each of the following:

<table>
<thead>
<tr>
<th>Position</th>
<th>Number</th>
<th>Wage Rate</th>
<th>Employer</th>
<th>Union Affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Full</td>
<td>Part</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reservationists</td>
<td>4 FTE</td>
<td>$20 per hour</td>
<td>LTC</td>
<td>Non-union</td>
</tr>
<tr>
<td>(also work as part time dispatchers)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedulers</td>
<td>-</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dispatchers</td>
<td>2</td>
<td>$20 per hour</td>
<td>LTC</td>
<td>Non-union</td>
</tr>
<tr>
<td>Operators</td>
<td>47 drivers</td>
<td>$8-10 per hour</td>
<td>“About Town” Transportation</td>
<td>Non-union</td>
</tr>
<tr>
<td>Inspectors/Operations Supervisors</td>
<td>1 supervisor for drivers ; 1 Manager (““About Town”)</td>
<td>n/a</td>
<td></td>
<td>Non-union</td>
</tr>
<tr>
<td>Maintenance Employees</td>
<td>2-3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Administrative staff (non-management)</td>
<td>None</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Complaints and Commendations:**

- Number of each per year: In 2005: 47 complaints; 6 commendations
- Breakdown by type:
  - 47 complaints: 8-driving behaviour; 3-operator conduct; 2-no show; 2-registration problems; 21-service not accommodated; 1 – shared ride; 5-warning letter dispute; 1-equipment/accessibility of vehicles; 1-condition of vehicle
  - 6 commendations: 1-driver; 1-operator conduct; 1-No show (went back); 2-registration; 1-service received
Eligibility Criteria:
Currently use functional model. Essentially, persons with permanent disabilities that cannot use conventional transit qualify to use specialized transit. The temporarily disabled do not qualify to use specialized transit although this will likely change very shortly. Persons with cognitive disabilities typically use workshop shuttles. Visually-impaired were previously given “snowpasses”, service has been extended to provide them with a CNIB pass which gives them free transportation for 12 months in a year. Non-peak passes have also been provided to registrants to enable them to use conventional transit for free during non-peak periods.

There is a large number of trips generated through the patient transfer program in London that was initiated by the hospitals there. Although transportation is supposed to be provided through Voyageur Taxi (and covered by the hospitals), some of these trips spill over into the specialized transit system.

Trip Purpose
- Breakdown by type (e.g. medical vs. day programs vs. recreational): Do not currently track statistics. However, at present, about 15,000 trips (about 10% of total) are dialysis trips. Approx. 30% are medical-related trips. 30-35% of trips are subscription trips.
- Has trip purpose pattern changed in recent years (e.g. higher growth in certain areas due to downloading or downscaling by other agencies)? General increase in dialysis trips, as with many other communities.

Use of Non-Dedicated Service (if applicable)
- How is non-dedicated service used (e.g. peaks only, all or some ambulatory trips): In the case of London, non-dedicated service is supplied by Voyageur Taxi. It is a secondary service provider which covers 20-30 trips on Saturdays and Sundays.
- Is non-dedicated service fully accessible? No, they are not fully accessible.
- Could non-dedicated service be used more? Not at the moment.

Sources of funding
- Identification of any non-municipal funding: None at present. In the near future, they expect some Provincial Gas Tax funding to cover trips for the temporarily disabled community.
- Percent from any external source: None at present.

Governance
- Type of organization (municipal, NPO, contracted): Contracted out. 1 NPO exists but only for travel training.
- If NPO, to whom does the NPO report, and how (what is the link to Council)?

Advantages and Disadvantages of Current Organizational Structure (municipal, NPO, contracted):
Service delivery of specialized transit in London is contracted out to two providers: “About Town” Transportation, which supplies 4x4 lift vehicles ($30.94 per hour) and sedans ($21.45 per hour); and Voyageur Taxi ($10.55 per trip) which only cover between 20-30 trips on the weekend.

Current set-up gives London Transit a lot of flexibility in dealing with staffing issues. Contracting out helps keep costs down while still providing good service.
HAMILTON ATS – PEER SYSTEM INTERVIEWS (Ottawa)

Organizational Comparison Data – For each of the following:

<table>
<thead>
<tr>
<th>Position</th>
<th>Number</th>
<th>Wage Rate</th>
<th>Employer</th>
<th>Union Affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reservationists</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedulers</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dispatchers</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Operators</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inspectors/Operations Supervisors</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintenance Employees</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Administrative staff (non-</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>management)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Complaints and Commendations:
- Number of each per year:
- Breakdown by type:

Eligibility Criteria:

Trip Purpose
- Breakdown by type (e.g. medical vs. day programs vs. recreational):
- Has trip purpose pattern changed in recent years (e.g. higher growth in certain areas due to downloading or downscaling by other agencies)?

Use of Non-Dedicated Service (if applicable)
- How is non-dedicated service used (e.g. peaks only, all or some ambulatory trips)
- Is non-dedicated service fully accessible?
- Could non-dedicated service be used more?

Sources of funding
- Identification of any non-municipal funding
- Percent from any external source

Governance
- Type of organization (municipal, NPO, contracted):
- If NPO, to whom does the NPO report, and how (what is the link to Council)?

Advantages and Disadvantages of Current Organizational Structure (municipal, NPO, contracted):
### HAMILTON ATS – PEER SYSTEM INTERVIEWS (Peel Region)

**Organizational Comparison Data – For each of the following:**

<table>
<thead>
<tr>
<th>Position</th>
<th>Number</th>
<th>Wage Rate</th>
<th>Employer</th>
<th>Union Affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Full Time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reservationists</td>
<td>3</td>
<td>$36,472 - $45,590 per annum</td>
<td>Peel Region</td>
<td>Non-union</td>
</tr>
<tr>
<td></td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Part Time</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>To be increased to 29 over next year (note: these 29 will also serve other functions)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedulers</td>
<td>2</td>
<td>$44,964 - $56,206 per annum</td>
<td>Peel Region</td>
<td>Non-union</td>
</tr>
<tr>
<td>Dispatchers</td>
<td>2</td>
<td>$36,472 - $45,590 per annum</td>
<td>Peel Region</td>
<td>Non-union</td>
</tr>
<tr>
<td>Operators</td>
<td>TransHelp drivers 31</td>
<td>TransHelp Drivers 24</td>
<td>$21.94 per hour</td>
<td>Peel Region</td>
</tr>
<tr>
<td>Inspectors/Operations Supervisors</td>
<td>2 Operations supervisors; 1 admin+support supervisor (Corrina Demelo)</td>
<td></td>
<td>$62,663 - $78,328 per annum</td>
<td>Peel Region</td>
</tr>
<tr>
<td>Maintenance Employees</td>
<td>1 head mechanic; 1 mechanic; 5 other maintenance staff</td>
<td></td>
<td>$24.89 per hour</td>
<td>Peel Region</td>
</tr>
<tr>
<td>Other Administrative staff (non-management)</td>
<td>1 customer service coordinator; 1 control clerk</td>
<td>n/a</td>
<td>Peel Region</td>
<td>Non-union</td>
</tr>
</tbody>
</table>

**Complaints and Commendations:**
- Number of each per year: 305 in 2004
- Breakdown by type: About 70% for taxis; 30% for buses. Note that 70% trips by TransHelp buses, 30% provided by contracted taxis (2 taxi vendors supply 6 vehicles each).
Eligibility Criteria: Any resident of Peel Region with physical mobility problems that prohibit them from using conventional transit (i.e. functional model).

Trip Purpose
- Breakdown by type (e.g. medical vs. day programs vs. recreational):
  - 32% medical; 41% personal; 13% social; 4% educational; 10% work.
  - Has trip purpose pattern changed in recent years (e.g. higher growth in certain areas due to downloading or downscaling by other agencies)? Have not tracked these statistics long enough to discern trends.

Use of Non-Dedicated Service (if applicable)
- How is non-dedicated service used (e.g. peaks only, all or some ambulatory trips): Any trips that cannot be fulfilled by Transhelp buses
- Is non-dedicated service fully accessible? 1 out of the 6 vehicles provided by each taxi vendor is sedan (i.e. not fully accessible).
- Could non-dedicated service be used more? Don’t think so.

Sources of funding
- Identification of any non-municipal funding: Information not available.
- Percent from any external source

Governance
- Type of organization (municipal, NPO, contracted): Municipal and contracted out taxi services.
- If NPO, to whom does the NPO report, and how (what is the link to Council)?

Advantages and Disadvantages of Current Organizational Structure (municipal, NPO, contracted):
Good system that meets demands of clients. In the past, about 60% of trips were provided by Transhelp buses and 40% by taxis. This has increased to 70% by transhelp buses, 30% taxis. Probably greater reliance on transhelp buses in the future as they increase their fleet.
## HAMILTON ATS – PEER SYSTEM INTERVIEWS (Quebec)

**Organizational Comparison Data – For each of the following:**

<table>
<thead>
<tr>
<th>Position</th>
<th>No.</th>
<th>Wage Rate</th>
<th>Employer</th>
<th>Union Affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reservationists</td>
<td>8</td>
<td>$15-19/hour</td>
<td>NPO contracted by Transport Society which is funded by the City government.</td>
<td>Yes</td>
</tr>
<tr>
<td>Schedulers</td>
<td>2</td>
<td>$25-28/hour</td>
<td>NPO contracted by Transport Society which is funded by the City government.</td>
<td>Yes</td>
</tr>
<tr>
<td>Dispatchers</td>
<td>1 for taxi, 1 for minibus</td>
<td>$25-28/hour</td>
<td>NPO contracted by Transport Society which is funded by the City government.</td>
<td>Yes</td>
</tr>
<tr>
<td>Operators</td>
<td>17</td>
<td>$20/hour</td>
<td>NPO contracted by Transport Society which is funded by the City government.</td>
<td>Yes</td>
</tr>
<tr>
<td>Inspectors/Operations Supervisors</td>
<td>1</td>
<td>$70,000/year</td>
<td>NPO contracted by Transport Society which is funded by the City government.</td>
<td>No</td>
</tr>
<tr>
<td>Maintenance Employees</td>
<td>1</td>
<td>$20/hour</td>
<td>NPO contracted by Transport Society which is funded by the City government.</td>
<td>Yes</td>
</tr>
<tr>
<td>Other Administrative staff (non-management)</td>
<td>1 financial and customer service administrator</td>
<td>1 receptionist</td>
<td>$55,000/year</td>
<td>NPO contracted by Transport Society which is funded by the City government.</td>
</tr>
<tr>
<td></td>
<td>1 administrator</td>
<td>$42,000/year</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>$22/hour</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Complaints and Commentations:
- Number of each per year:
  - typically 500-600/year
  - 500-600 since June of this year, due to the implementation of new complaints system
- Breakdown by type: 70% for taxis, 30% for minibus

Eligibility Criteria: Established and regulated by the province

Trip Purpose
- Breakdown by type (e.g. medical vs. day programs vs. recreational):
  - 13% general service
  - 32% workshops for mentally handicapped
  - 28% recreational
  - 9% work
  - 11% school
  - 6% medical
- Has trip purpose pattern changed in recent years (e.g. higher growth in certain areas due to downloading or downscaling by other agencies)? It’s bee stable at the above ranges for several years.

Use of Non-Dedicated Service (if applicable)
- <5% of trips are wheelchair accessible taxis
- 64% of trips are regular taxis
- 10% of trips are contracted minibuses
- 21% of trips are TACM owned minibuses.
  - How is non-dedicated service used (e.g. peaks only, all or some ambulatory trips)
  - Is non-dedicated service fully accessible?
  - Could non-dedicated service be used more?

Sources of funding
- Identification of any non-municipal funding
  - Quebec province, 70%
  - Quebec City 20%
  - 10% from clients, fee per trip
- Percent from any external source

Governance
- Type of organization (municipal, NPO, contracted):
  - NPO contracted by the Transport Society which is City government.
- If NPO, to whom does the NPO report, and how (what is the link to Council)?
  - NPO reports to the Transport Society.

Advantages and Disadvantages of Current Organizational Structure (municipal, NPO, contracted):
Quebec is the only city in the province of Quebec that uses the Transport Society for both handicapped and regular services. This is the best formula for an organizational structure. It is a guarantee of service for clients and guarantees the quality of that service. It allows for an autonomous and transparent process.
### HAMILTON ATS – PEER SYSTEM INTERVIEWS (Victoria)

**Organizational Comparison Data – For each of the following:**

<table>
<thead>
<tr>
<th>Position</th>
<th>Number.</th>
<th>Wage Rate</th>
<th>Employer</th>
<th>Union Affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>[Full Time][Part Time]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reservationists</td>
<td>3</td>
<td>Not available. June said this information could potentially be obtained from CAW</td>
<td>Farwest</td>
<td>CAW</td>
</tr>
<tr>
<td>Schedulers</td>
<td>1.5</td>
<td>Not available.</td>
<td>Farwest</td>
<td>CAW</td>
</tr>
<tr>
<td>Dispatchers</td>
<td>2</td>
<td>Not available.</td>
<td>Farwest</td>
<td>CAW</td>
</tr>
<tr>
<td>Operators</td>
<td>71 and spare board</td>
<td>Not available.</td>
<td>Farwest</td>
<td>CAW</td>
</tr>
<tr>
<td>Inspectors/Operations Supervisors</td>
<td>None</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Maintenance Employees</td>
<td>1.5;</td>
<td>Not available.</td>
<td>Farwest</td>
<td>CAW</td>
</tr>
<tr>
<td></td>
<td></td>
<td>other maintenance work contracted out with Farwest (typically 3-year renewal). Vehicles owned by BC Transit</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Administrative staff (non-management)</td>
<td>None. Manager deals with complaints directly.</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

**Complaints and Commendations:**
- Number of each per year: 3 complaint per month; ~ about 3 per month for commendations
- Breakdown by type: Largely focused on driver lateness and drivers attitude for both.

**Eligibility Criteria:**
Users who have cognitive and/or physical mobility impairment to use regular transit service may be eligible to use the specialized transit service.
**Trip Purpose**
- Breakdown by type (e.g. medical vs. day programs vs. recreational): Workshops and day centres (developmental and cognitive disabilities) about 28% of trips; Medical (physio and renal): 21%; Social/recreational about 18%; remainder is personal, business, work and educational.
- Has trip purpose pattern changed in recent years (e.g. higher growth in certain areas due to downloading or downscaling by other agencies)? Do not appear to have much change. Think that renal patients have increased in the past few years with Diabetes Type II increasing. No discernible changes to trips yet but they are keeping an eye on the issue.

**Use of Non-Dedicated Service (if applicable)**
- How is non-dedicated service used (e.g. peaks only, all or some ambulatory trips): Mostly ambulatory trips.
- Is non-dedicated service fully accessible? 7 or 8 fully accessible vehicles in use.
- Could non-dedicated service be used more? Under provincial funding freeze in past 4 years. More funding is needed to increase services.

**Sources of funding**
- Identification of any non-municipal funding. None, apart from Provincial funding.
- Percent from any external source: About 33% from Municipality; 67% from Province.

**Governance**
- Type of organization (municipal, NPO, contracted): Municipal (Victoria Regional Transit System) report to the BC Transit Board and is in charge of funding, policies and operational guidelines. Service delivery is contracted out.
- If NPO, to whom does the NPO report, and how (what is the link to Council)? n/a although they do have volunteer drivers.

**Advantages and Disadvantages of Current Organizational Structure (municipal, NPO, contracted):**
HandiDART; Taxi scrip; travel training and conventional low-floor buses (family of services concept). About 80% of fleet are low-floor.
### HAMILTON ATS – PEER SYSTEM INTERVIEW (Winnipeg)

**Organizational Comparison Data – For each of the following:**

<table>
<thead>
<tr>
<th>Position</th>
<th>No.</th>
<th>Wage Rate</th>
<th>Employer</th>
<th>Union Affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Full Time</td>
<td>Part Time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reservationists</td>
<td>8 permanent, 4 temporary</td>
<td>Clerk A</td>
<td>City of Winnipeg</td>
<td>CUPE</td>
</tr>
<tr>
<td>Schedulers</td>
<td>n/a. They use software to schedule</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Dispatchers</td>
<td>3</td>
<td>Clerk C</td>
<td>City of Winnipeg</td>
<td>CUPE</td>
</tr>
<tr>
<td>Operators</td>
<td>None. Service delivery contracted out.</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Inspectors/Operations Supervisors</td>
<td>Supervisor - 1.5, On-street Inspector - 1</td>
<td>Dedicated full-time supervisor – WAPSO 5; Part-time supervisor – WAPSO 2; on-street supervisor – Senior clerk</td>
<td>City of Winnipeg</td>
<td>Winnipeg Association of Public Service Officers (WAPSO)</td>
</tr>
<tr>
<td>Maintenance Employees</td>
<td>n/a. Do not own vehicles</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Other Administrative staff (non-management)</td>
<td>1 permanent customer service; 2 General Admin (payments, etc.)</td>
<td>All Clerk C</td>
<td>City of Winnipeg</td>
<td>CUPE</td>
</tr>
</tbody>
</table>

*Note: Catherine Caldwell (Manager of Handi-Transit) is WAPSO-exempt.*
Complaints and Commendations:
- Number of each per year: 1,134 complaints in 2004. **Estimate of commendations to be sent by Catherine.**
- Breakdown by type: Do not track breakdowns.

Eligibility Criteria:
**To be sent by Catherine.**

Trip Purpose
- Breakdown by type (e.g. medical vs. day programs vs. recreational): They have 3 classes of trips: Priority 1 – Medical, dialysis, work-related, post-secondary, etc.; Priority 2 – Grooming, groceries, ticketed event, medical-related without doctor such as physiotherapy, etc; Priority 3 – Discretionary and recreational trips. **Details to be sent by Catherine.** Jan – Mar 2005: 68% Priority 1; 20% Priority 2; 12% Priority 3. About 30% of all trips made are also subscriptions trips (i.e. minimum of 3 trips per week to same venue). Priority 1 and 2 trips are guaranteed by mandate, “reasonable” amount of Priority 3 trips are accommodated.
- Has trip purpose pattern changed in recent years (e.g. higher growth in certain areas due to downloading or downscaling by other agencies)? Yes, medical-related trips increasing. For example, Priority 1 trips have increased from 60% to 68% over the last few years.

Use of Non-Dedicated Service (if applicable)
- How is non-dedicated service used (e.g. peaks only, all or some ambulatory trips)
- Is non-dedicated service fully accessible?
- Could non-dedicated service be used more?

Sources of funding
- Identification of any non-municipal funding: Detailed information not available. Manitoba pays for about 17% of Winnipeg Transit’s Operating budget (decreasing each year. E.g. down from 22.9% in 1998), some of that money makes it into the Handi-Transit system but she does not know how much. The Province also has also provided a grant for special transit in the last few years but the amount is small (~$500 K).
- Percent from any external source:

Governance
- Type of organization (municipal, NPO, contracted): Municipal managed; service delivery contracted out.
- If NPO, to whom does the NPO report, and how (what is the link to Council)? n/a
Advantages and Disadvantages of Current Organizational Structure (municipal, NPO, contracted):
Contracting out has saved City lots of money. Cannot see City moving to something with NPO-type structure. They are happy with contracting out because they still retain control of service delivery with penalties in place if contractors do not meet standards. See no need for change in governance structure, just better of use of technology to improve. For example, use of dynamic scheduling software can be supplemented with GPS for vehicle location to better allocate services. Need for better confirmation system-they currently use an IVR automated system for trip confirmation (get ~1,500 calls per day).

Additional Notes/Comments:
Updated No Show policy in June 2004. For example, 1st no show - warning; 2nd no show – pay 1 fare; 3rd no show – pay 2 fares, etc. After $30 accumulated, cut off service if not paid in 10 days.

They are looking to add a part-time occupational therapist and possibly doctor (part-time) to help assess whether patrons subscribing for services meet their eligibility criteria.

Contracts for service delivery are typically 5-year contracts since they require vehicles and vans to be less than 5-years old (hence gives protection to contractor for the expected service-life of the vehicle used). 7-year contracts for mini-bus operators.
## HAMILTON ATS – PEER SYSTEM INTERVIEWS (York Region)

**Organizational Comparison Data** – For each of the following:

<table>
<thead>
<tr>
<th>Position</th>
<th>No.</th>
<th>Wage Rate</th>
<th>Employer</th>
<th>Union Affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Time</td>
<td>Part Time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reservationists</td>
<td>n/a</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedulers</td>
<td>Combined with dispatcher. Do everything- trip booking (i.e. reservations), scheduling, customer service</td>
<td>$20-$23 per hour</td>
<td>York Region</td>
<td>CUPE 905</td>
</tr>
<tr>
<td>Dispatchers</td>
<td>8</td>
<td>4</td>
<td>York Region</td>
<td>CUPE 905</td>
</tr>
<tr>
<td>Operators</td>
<td>20% of trips provided by inhouse bus service. 11 fulltime, 2 part-time operators. Now to be contracted out.</td>
<td>$21-$24 per hour</td>
<td>York Region</td>
<td>CUPE 905</td>
</tr>
<tr>
<td>Inspectors/Operations Supervisors</td>
<td>1 supervisor of operations (contract administration); 1 supervisor scheduling/dispatch/eligibility criteria; 1 training coordinator (certification of drivers, vehicles, accident investigation). Contract assistant to be added in 2006.</td>
<td>$70,000 range; mid $50K for training coordinator</td>
<td>York Region</td>
<td>CUPE 905</td>
</tr>
<tr>
<td>Maintenance Employees</td>
<td>Sedan/mini van – serviced as part of contract. 2 facilities currently servicing buses- Vaughan &amp; Newmarket</td>
<td>To be contracted out.</td>
<td>Not available</td>
<td>York Region</td>
</tr>
<tr>
<td>Other Administrative staff (non-management)</td>
<td>n/a</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Complaints and Commendations:
- Number of each per year: 2003 – 99; 2004 – 123;
- Breakdown by type: Not available. Brian has noted that in-house services provided by bus services get fewer complaints versus contracted.

Eligibility Criteria:
Based on functional model, not physical model, along with grandfather rights for users with Alzheimers, Down’s Syndrome, etc. Essentially, anyone with physical disability qualifies or anyone that cannot use accessibility conventional services.

Trip Purpose
- Breakdown by type (e.g. medical vs. day programs vs. recreational): In 2004: 69% medical; 9% for recreational; 6% for necessary shopping; 4% for work; 3% training/school; 3% for pleasure shopping; 5% for personal business.
- Has trip purpose pattern changed in recent years (e.g. higher growth in certain areas due to downloading or downscaling by other agencies)? Medical-based trips has gone up 9% since 2003; social recreational down from 14%.

Use of Non-Dedicated Service (if applicable)
- How is non-dedicated service used (e.g. peaks only, all or some ambulatory trips): 80% currently contracted. 70% of that service is non-dedicated. In most cases, these are sedan operations.
- Is non-dedicated service fully accessible? 30% for entire fleet is fully accessible, will go up to 50% by years end. Of the non-dedicated service, about 20% is fully accessible.
- Could non-dedicated service be used more? Only way is dedicating the non-dedicated service.

Sources of funding
- Identification of any non-municipal funding: Capital funds from MTO; not operating costs. For example, York Region purchased 8 buses—MTO then determines which of the 8 buses are for growth and which are for refurbishment.
- Percent from any external source: Changes year to year depending on capital requirements.

Governance
- Type of organization (municipal, NPO, contracted): Municipal + contract out
- If NPO, to whom does the NPO report, and how (what is the link to Council)? n/a

Advantages and Disadvantages of Current Organizational Structure (municipal, NPO, contracted):
Making changes in 2006 depending on budget: customer service; applications (to determine eligibility); schedule analysts, etc. Done due to concerns due to accountability, efficient use of staff, etc. Contracting out of inhouse bus services (currently provides about 20% of trips) to keep costs down. Customer service; scheduling; dispatching; contracts admin; safety & training, auditing functions all to be kept in-house.
Appendix B

Stakeholder Submissions
Opportunities for Specialized Transit Development in Hamilton

Mobility is a crucial component of everyone’s quality of life. Affordable, easy-to-use and flexible transportation options are essential for accessing health care services, establishing and maintaining social and family contacts, and preserving independence and general well-being of all citizens of Hamilton.

DARTS Submission to ATS Service Review Committee
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3 Current General Management Issues..........................................................................6
4 Summary: Go Slow, Minimize Risk, Maximize Return..............................................13
5 The Van Plan..............................................................................................................14
1 Recommendations

1.1 Lowest Cost Service Expansion....

See the Van Plan for more details...

The most cost effective way to increase the number of paratransit rides is by adding more ambulatory van rides (as opposed to wheelchair rides).

Most communities report total rides only. That is, the reports do not differentiate between the type of ride: wheelchair or ambulatory rides. However, wheelchair buses are much more expensive to operate than vans.

1.2 Engage Funding Partners at Registration

Potential for $3 million in savings here..

By ensuring that the registrant uses all alternative funding or co-payment sources available to them, the city could well reduce its contribution levels while still maintaining current paratransit service levels within the city.

In Hamilton, both the Ministry of Health and Ministry of Community and Social Services transportation programs are heavily subsidized by the City. In 2005, DARTS provided $1.4 million in rides for Ministry of Health Programs and $1.6 million in rides for Ministry of Community and Social Services sponsored programs.

1.3 Scheduling

Potential for and extra $600,000 in services...

With proper resources applied to the scheduling system DARTS could improve productivity from the current 1.9-2.0 trips/hour range to 2.5 trips/hour.

If we reach the productivity goal of 2.5 trips/hour, DARTS would deliver the same number of trips as it does now with a savings in labour costs worth an estimated $600,000.

Please see the section on budgeting methods for an explanation.
1.4 Reservations

Passengers often have significant flexibility in their schedules. This flexibility could be used to improve the productivity of the schedules.

**Reduce pre-booked (subscription) ride levels for passengers not in programs.** This will reduce cancellations from the current situation where program passengers are responsible for the high number of cancellations. The downside will be an increase in the reservation phone traffic for casual rides.

1.5 Customer Service

**No service provider can deliver a service without a customer service component.** This group ensures that all passengers benefit equally from the service.

According to our passenger services department, cancellations are not accurately reported at the moment. This issue is mainly due to the way cancellations are logged by Dispatch and Reservations. DARTS appears to suffer an apparent 20% loss in capacity on the day of service due to late cancellations. For example, in 2005, there were 40 Passengers who cancelled a total of 7000 rides. At an average ride cost of $24, this represents a value of $168,000.

1.6 Drivers Shift Assignment and Benefit Savings

DARTS is currently negotiating Improvements to the shift assignment protocols to improve the availability of drivers. DARTS has begun working with a claims management service to reduce the overall benefits costs resulting in a combined saving of over $100,000 in lower WSIB claims.

1.7 Sub-Contracts (Savings of up to $600,000)

DARTS pays too much for the vehicle and too little for the driver under the current taxi subcontract. (Based on a cost/trip).

DARTS has obtained quotes to lease, gas, insure and maintain vans directly for approximately $2250/month whereas the current contractor pays out an average of $4883/month to the vehicle owner for the highest 19 volume runs. **This would result in an annual savings of $600,000 on these 19 runs.**
2 Introduction

2.1 The six functional areas of a Para Transit System

Each area will be discussed in turn with respect to how the Hamilton system operates. The six areas are as follows:

To ride on DARTS vehicles you must be eligible to \( (1) \) register. The registration requirements to ride on the DARTS system are: that you must be a Hamilton Citizen and either use a wheelchair, walker or scooter, a dialysis patient or have been diagnosed with Alzheimer’s. The registration process is a way to manage access to the system. The current requirements are more liberal than most communities. In most other communities, access to paratransit is by way of a personal assessment of mobility. The usual requirement to register is that the person is unable to walk 100 or so steps. Hamilton is moving to an assessment based process but no action has been taken to date.

Once registered, passengers call the \( (2) \) reservation line up to 1 week in advance to book a ride. Passengers can also register to be put on master or subscription ride. To be given a subscription ride, passengers must make regular trips to the same location. 60 to 80% of the daily rides on DARTS are passengers who have masters. By default then, master riders have priority over casual riders since their reservations are already booked before the reservation lines open. During peak times, it is highly unlikely that casual passengers can book rides. Over the years, passengers have come to realise that if they ask for a subscription ride they will at least have some priority in the system. Unfortunately the requirement to go to the same location causes these passengers to cancel their rides frequently. This results in a current suspected cancellation rate as high as 20% at DARTS.

One day before the day of service all rides are \( (3) \) scheduled on roughly 60 buses and 20 vans.

The scheduling system, Trapeze, was designed to schedule bus runs based on the ride reservations for the day. The system currently produces low quality schedules due to the high number of master rides and the lack of knowledgeable IT staff support. The low quality schedules cause most passenger complaints and driver complaints (grievances) at DARTS.

The schedules are handed over to the \( (4) \) drivers and they drive according to these schedules. Cancellations on the day of service and requests for casual rides on the day of service are relayed to the drivers by \( (5) \) dispatchers.

Service problems and enquiries are handled by \( (6) \) Customer Service. Customer Service represents the interest of the organization to the public. Like any other service organization, they work to resolve passenger issues that arise during the operation of the service.
3 Current General Management Issues

In November of 2003, the Reservation and Scheduling functions were taken over by ATS/HSR acting on the advice of a consultant hired by ATS/HSR on behalf of the city. The new service delivery paradigm was defined as the Alternate Service Delivery (ASD) Model.

3.1 Service Problems: Accountability

With ATS/HSR taking over these two service components, DARTS and ATS/HSR now split the delivery of Paratransit services between the two organizations but not the accountability.

In any service model, to manage the performance of the service it is important to be clear on who is accountable. If more than one organization or party is accountable for the same service, responsibility for service issues is difficult to determine and little or no recourse is available to the customer with the service problem.

Below in table 1, are outlined some of the split accountability - service issues.

These split accountability issues must be addressed since both ATS and DARTS find the current Alternate Service Delivery Model unworkable.

3.2 The Trapeze Scheduling System

In 2004, at about the time of assuming responsibility for Reservations and Scheduling, ATS/HSR implemented a Para-transit Bus scheduling system called Trapeze. Trapeze is an extremely complex scheduling system with a poor quality user interface design. The application was installed with limited IT support staff. The application continues to be operated without the staff qualified to support the product.

For most of 2004 and 2005, DARTS staff has worked with ATS staff to try to resolve the scheduling performance issues. The schedules are still not of the best quality and there is no real forward progress in this area.
<table>
<thead>
<tr>
<th>Function</th>
<th>Who has the Mandate</th>
<th>The Public’s Perception of Accountability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registration</td>
<td>ATS, a Section of the HSR</td>
<td>The Public, including City Councillors often call DARTS with requests for service for themselves or constituents.</td>
</tr>
<tr>
<td>Customer Service</td>
<td>ATS, a Section of HSR</td>
<td>DARTS customer service personnel were transferred to ATS. Public perception initially was that they were continuing to talk to DARTS staff. DARTS established Passenger Services to deal with investigating passenger issues and to ensure that passenger issues were resolved appropriately.</td>
</tr>
<tr>
<td>Reservations</td>
<td>ATS staff takes reservations/cancellations from 7 days before up until the day before the day of service. DARTS staff takes reservations on the day of service</td>
<td>The public often holds DARTS accountable for reservation problems.</td>
</tr>
<tr>
<td>Scheduling</td>
<td>ATS staff produces the schedules the day before the day of service. DARTS staff schedules rides on the day of service</td>
<td>The Public holds DARTS accountable for schedule performance as part of the overall service performance.</td>
</tr>
<tr>
<td>Dispatching</td>
<td>Darts staff dispatch all vehicles</td>
<td>DARTS</td>
</tr>
<tr>
<td>Drivers</td>
<td>The 66 bus drivers are DARTS employees The 20 Van drivers are contract employees of Veterans-Hamilton Cab</td>
<td>DARTS. The Public does not differentiate between contract drivers and DARTS employee drivers.</td>
</tr>
</tbody>
</table>
3.3 Reporting on the performance of the system

DARTS recommends a change in the performance reporting process for Paratransit.

In Canada, the Canadian Urban Transit Association (CUTA) fact book provides statistics on Paratransit rides in most urban centres. DARTS has some issues with respect to the way the statistics are collected and reported:

For example:

- All trips are counted equally regardless of whether they were in a Van, Sedan or Bus. **There is a significant difference in cost of delivery** between Van Trips and Wheelchair Bus trips. Much higher efficiencies can be reached with Vans (passengers/hour) than can be achieved with buses. In future, DARTS recommends that the two types of trips, Ambulatory and Wheelchair be costed separately.

- A trip is defined as the travel on a paratransit vehicle between two locations. A trip can be made with any number of passengers. There are approximately (10%) more passengers than trips when people travel with personal attendants and companions. Often the word trips and passengers are used interchangeably. This can lead to as much as a 10% discrepancy in reporting numbers.

Table 2 below lists the paratransit service statistics for CUTA member paratransit systems for 2003. These stats show that Winnipeg, a city larger than Hamilton, actually delivered 50,000 less wheelchair trips than Hamilton. With respect to the performance of systems in 2003, as reported by CUTA, Darts productivity and costs were very comparable to other Cities of similar size. However DARTS delivered more wheelchair rides/capita than any other jurisdiction except for Edmonton.

Communities that delivered more wheelchair trips than van or sedan trips reported a higher cost per trip than other communities listed on the table 2 on the next page.
<table>
<thead>
<tr>
<th>City</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
</tr>
</thead>
<tbody>
<tr>
<td>York Region</td>
<td>842,416</td>
<td>210,866</td>
<td>City</td>
<td>5,370,508</td>
<td>90%</td>
<td>43,577</td>
<td>167,289</td>
<td>21%</td>
<td>25.47</td>
<td>5%</td>
</tr>
<tr>
<td>Windsor</td>
<td>208,402</td>
<td>39,017</td>
<td>Board</td>
<td>838,235</td>
<td>84%</td>
<td>16,601</td>
<td>22,416</td>
<td>43%</td>
<td>21.48</td>
<td>8%</td>
</tr>
<tr>
<td>Halifax</td>
<td>300,000</td>
<td>125,847</td>
<td>City</td>
<td>2,138,590</td>
<td>96%</td>
<td>31,194</td>
<td>94,653</td>
<td>25%</td>
<td>16.99</td>
<td>10%</td>
</tr>
<tr>
<td>KW Total</td>
<td>425,700</td>
<td>214,791</td>
<td>City</td>
<td>4,505,575</td>
<td>88%</td>
<td>61,189</td>
<td>153,602</td>
<td>27%</td>
<td>20.98</td>
<td>14%</td>
</tr>
<tr>
<td>Longueuil</td>
<td>385,690</td>
<td>257,401</td>
<td>Private</td>
<td>2,862,465</td>
<td>20%</td>
<td>58,639</td>
<td>198,762</td>
<td>23%</td>
<td>11.12</td>
<td>15%</td>
</tr>
<tr>
<td>Laval</td>
<td>350,000</td>
<td>247,852</td>
<td>Private</td>
<td>3,616,318</td>
<td>19%</td>
<td>54,482</td>
<td>193,370</td>
<td>22%</td>
<td>14.59</td>
<td>16%</td>
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<td>Gatineau</td>
<td>240,297</td>
<td>131,370</td>
<td>Private</td>
<td>1,986,099</td>
<td>20%</td>
<td>41,415</td>
<td>89,955</td>
<td>32%</td>
<td>15.12</td>
<td>17%</td>
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<td>Victoria</td>
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<td>284,604</td>
<td>Private</td>
<td>4,944,944</td>
<td>30%</td>
<td>64,644</td>
<td>219,960</td>
<td>23%</td>
<td>17.37</td>
<td>19%</td>
</tr>
<tr>
<td>Quebec</td>
<td>500,000</td>
<td>346,048</td>
<td>City</td>
<td>5,387,779</td>
<td>21%</td>
<td>103,499</td>
<td>242,549</td>
<td>30%</td>
<td>15.57</td>
<td>21%</td>
</tr>
<tr>
<td>Calgary</td>
<td>922,315</td>
<td>501,161</td>
<td>Board</td>
<td>12,288,070</td>
<td>95%</td>
<td>225,321</td>
<td>275,840</td>
<td>45%</td>
<td>24.52</td>
<td>24%</td>
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<tr>
<td>London</td>
<td>355,000</td>
<td>163,985</td>
<td>City</td>
<td>2,658,352</td>
<td>89%</td>
<td>88,054</td>
<td>75,931</td>
<td>54%</td>
<td>16.21</td>
<td>25%</td>
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<tr>
<td>Winnipeg</td>
<td>536,820</td>
<td>513,831</td>
<td>City</td>
<td>7,752,028</td>
<td>50%</td>
<td>146,490</td>
<td>367,341</td>
<td>29%</td>
<td>15.09</td>
<td>27%</td>
</tr>
<tr>
<td>Ottawa</td>
<td>737,000</td>
<td>721,001</td>
<td>City</td>
<td>19,924,387</td>
<td>93%</td>
<td>212,272</td>
<td>508,729</td>
<td>29%</td>
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<td>29%</td>
</tr>
<tr>
<td>Saskatoon</td>
<td>205,300</td>
<td>89,760</td>
<td>City</td>
<td>2,042,447</td>
<td>66%</td>
<td>80,087</td>
<td>9,673</td>
<td>89%</td>
<td>22.75</td>
<td>39%</td>
</tr>
<tr>
<td>Hamilton</td>
<td>490,270</td>
<td>581,625</td>
<td>Board</td>
<td>9,821,450</td>
<td>93%</td>
<td>196,609</td>
<td>385,016</td>
<td>34%</td>
<td>16.89</td>
<td>40%</td>
</tr>
<tr>
<td>Edmonton</td>
<td>689,917</td>
<td>809,181</td>
<td>City</td>
<td>12,714,320</td>
<td>88%</td>
<td>291,922</td>
<td>517,259</td>
<td>36%</td>
<td>15.71</td>
<td>42%</td>
</tr>
</tbody>
</table>

**Table 2**  
CUTA Specialized Transit Service 2003 Fact Book Data for Selected Cities

<table>
<thead>
<tr>
<th>Column</th>
<th>Column Data Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>Population of the City</td>
</tr>
<tr>
<td>C</td>
<td>Trips: the number of specialized trips reported by the city. May be an aggregate of taxi, wheelchair, taxi-scripts or van service.</td>
</tr>
<tr>
<td>D</td>
<td>Control: The Management/Ownership of the Service - Board=Board of Directors, Private=Private for Profit, City=Dispatches Vehicles</td>
</tr>
<tr>
<td>E</td>
<td>Total: total system annual operating expenses</td>
</tr>
<tr>
<td>F</td>
<td>Fund: Relative level of funding by Municipality</td>
</tr>
<tr>
<td>G</td>
<td>WC: Number of wheelchair rides</td>
</tr>
<tr>
<td>H</td>
<td>AMB: Number of ambulatory rides. (passengers board the bus/van with minimal assistance from driver.</td>
</tr>
<tr>
<td>I</td>
<td>%W = ratio wheelchair to total rides. Wheelchair cost twice as much as ambulatory rides to deliver.</td>
</tr>
<tr>
<td>J</td>
<td>$/Ride reported average cost of Ride</td>
</tr>
<tr>
<td>K</td>
<td>W/Capita = number of wheelchair rides divided by the city population</td>
</tr>
</tbody>
</table>
3.4 The History of Financial Management and Accountability

When DARTS is funded by several sources from outside the former Regional/City budget, DARTS is seen as a service delivery partner to the City rather than a tremendous cost to the city taxpayer.

Figure 2 below shows the funding of DARTS, as reported in the DARTS Annual Financial Statements from 1978 to the present day. The chart shows that up until the mid-nineties, the funding for DARTS services was shared between several stakeholders with the Region of Hamilton-Wentworth paying approximately 33% until the late nineties. At that time, the Region/City became responsible for about 93% of the funding.

This large increase in cost, coupled with significant management problems at DARTS in the late 1990’s caused the Region to install detailed financial controls and to install ATS/HSR in a management oversight position which resulted in ATS becoming very involved in the routine management of DARTS.

For the past 9 years DARTS has filed detailed monthly financials statements and service performance statistics with ATS/HSR.

The detailed DARTS budget is reviewed and approved by ATS / Public Works Management with the DARTS board approval process a mere formality.

ATS, through the scheduling process, sets the amount of service that DARTS and VETS will deliver, yet these two budget entries continue to represent the largest budget overruns in the annual budget with the general perception that DARTS is responsible solely for the overrun.

In the future, if DARTS is to be held truly accountable, DARTS and ATS should agree on a per-ride cost and the number of trips to be delivered for the year. DARTS should then have the autonomy to be able to deliver the quantity of service at the agreed upon rates.

3.5 The Budget Development Process

The key component that determines the size of the Darts budget is the number of rides that are budgeted to be delivered in the community. There are two service providers: DARTS whose driving staff are paid on an hourly basis and VETS, whose staff is paid on a per trip basis.

With respect to VETS, the cost of the number of trips they can deliver is a straightforward calculation since VETS bills DARTS on a per trip basis.

With respect to DARTS, ATS and DARTS agree on a certain passenger trips/hour efficiency that can be attained which is currently 1.9 – 2.0 trips/hour. From here, the budgeted trips are translated into the total number of service hours. These service hours equal the number of payroll hours and payroll cost is the major budget component.

The balance of the budget deals with fuel, bus maintenance and administration; budget costs and entries here are similar to other administrative budgets across the city.
As you can see from the curve below in Figure 1, DARTS would realize an approximate savings of 100K annually for every ".1" increase in productivity.

![Projected Deficit Recovery](image)

**Figure 1  Relationship between deficit and productivity (Trips/hr)**

There are opportunities for improvement in forecasting and cost control

Wheelchair buses are at least 3 – 4 times the cost of a van to purchase and are significantly more costly to maintain than a van for the same passenger ambulatory load capability. The significant maintenance costs on wheelchair buses are due to the added features such as the ability to kneel and the wheelchair lifts and/or ramps required by passengers in wheelchairs, walkers or scooters. Yet, the current budgeting process considers only the per-trip cost of Vets and the service hours of DARTS.

To make the best use of the wheelchair buses, the efficiency calculation should be refined to remove the impact of the ambulatory rides taken on the wheelchair buses since that is not the best use of these vehicles and masks the poor performance of these vehicles as wheelchair carriers.
Figure 2. 1978-2004 Contribution to DARTS funding as reported in the Annual DARTS Audited Financial Statement
4 Summary: Go Slow, Minimize Risk, Maximize Return

1. DARTS has been through 3 reviews over the last five years. Each of these reviews has concentrated on a comparison of the management of the service to other paratransit services with very little consideration of the paratransit needs of communities in which the services operate. **DARTS is a shared ride, door to door service. The issues that define the performance of a Paratransit system are very different from those of regular transit service. More community participation is required. Paratransit requires a high degree of customer service and market management to perform and control costs in the Hamilton community.**

2. What the reviews have shown and what continues to be true is that there are many successful ways to manage a Paratransit Service in any given community.

3. Most paratransit services are reporting a **significant increase in demand** particularly in the seniors’ community. Hamilton has not planned for service increase at the rate demand will likely appear. This will lead to service complaints.

4. The **city is not the only provider** of assisted transportation services in the Hamilton Community. Yet most of these community transportation systems and programs operate independent of each other. This can only lead to underutilization of resources or over expenditure. A great opportunity to support a region wide coordination project.

5. According to a recent report created by ATS for the ACPD, Darts delivered 27,000 more trips this year over last year with a productivity increase of 8% and a 98.6% on time performance. DARTS states that there is still better productivity available provided Reservations and Scheduling is returned to DARTS.

6. The city should go slow on any reconfiguration of the workforce. There is a very real danger of substantial increase in costs should the DARTS employees or the Buses be drawn into the Transit Fleet:
   - A substantial increase in the maintenance staff to HSR levels of staffing. The Darts fleet would expand the Transit fleet by 66 buses. The preventive maintenance programs would require the hiring of another 33 personnel for maintenance alone.
   - DARTS bus drivers are paid less than HSR drivers but provide door to door assistance to individual passengers. DARTS Drivers are mostly female so the City should expect substantial pay equity challenges.
   - Between the maintenance staff increase and bus driver pay equity issues, you can expect an increase in service cost to the city in the range $2-5 million

7. DARTS as a Non Government Organization and a Non Profit with an effective and politically active board that can lobby the Community, Provincial and Federal Government on behalf of the Transportation Funding Needs of the mobility challenged. It can do this more effectively than any city department would be able to.
5 The Van Plan

Darts has reached an agreement with its CUPE Union management to implement a Class G Van driver wage of $13.50. With this rate, DARTS is capable of implementing a low cost assisted ambulatory passenger van service as described below:

SERVICE RELATED EXPENDITURES

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>DRIVERS WAGES</td>
<td>692,797</td>
<td>Based on rate below</td>
</tr>
<tr>
<td>EMPLOYEE BENEFITS</td>
<td>232,436</td>
<td>Benefits</td>
</tr>
<tr>
<td>GAS AND OIL</td>
<td>213,400</td>
<td>Gas/Oil</td>
</tr>
<tr>
<td>INSURANCE</td>
<td>31,104</td>
<td>Verbal Quote</td>
</tr>
<tr>
<td>COMMUNICATIONS/RADIO</td>
<td>14,230</td>
<td>20 radios + Maintenance</td>
</tr>
<tr>
<td>UNIFORMS</td>
<td>12,000</td>
<td>Uniforms</td>
</tr>
<tr>
<td>TRAINING</td>
<td>20,000</td>
<td>Cust Service / Driving</td>
</tr>
<tr>
<td>LICENSES AND PERMITS</td>
<td>5,920</td>
<td>Standard for 20 Vans</td>
</tr>
<tr>
<td>Vehicle Lease incl Maintenance</td>
<td>253,944</td>
<td>1175./month brakes/oil/tires</td>
</tr>
<tr>
<td>Total</td>
<td>1,475,831</td>
<td></td>
</tr>
</tbody>
</table>

Based on:

2.9 Trips/hr Productivity
0.97 $/Litre Fuel Charge
13.50 Class G Driver Wage
7.00 Km/trip
20 New Employees with Full-time Benefits
133,200 Trips/Year
20 Vans at a
1175 Monthly Lease
70,000 kms/year incl
2 Year Lease

Annual Per Van Charge 25,930
Annual Per Employee Charge 47,862

Monthly Per Van Charge 2,160.83
Monthly Per Employee Charge 3,988.47

In 2005, DARTS paid VETS-Hamilton Cab a total of $1,536,694 to deliver 133,184 trips. Contrary to popular belief, there is no real difference in cost of delivery of Van Trips between the for-profit and the non-profit sector. With DARTS however there is less driver turnover with better paying jobs and better benefits.
Amalgamated Transit Union

ATU Local 107

Submission
To the
Steering Committee
conducting an
Operational Review of Accessible Transit Services (ATS)

Hamilton City Council

December 2005
December 13, 2005

ATU Presentation Re: ATS Operational Review

ATU strongly believe that bringing the operation of ATS in house will be the best choice for the city and the users of this service.

The In-House operation provides the BEST service at the LOWEST cost.

The In-House operation is the only way to GUARANTEE the quality and frequency of the services as required.

Financial Implications:

Savings would be realized by the city by eliminating duplication of services such as;

1. Communications.
2. Employee Training.
4. Equipment (Buses) could be used for both ATS and REGULAR Service depending on service hours and seasons.
5. Maintenance, Cleaning, Fueling etc. Could be done more efficiently through cross utilization resources.
6. Hybrids buses currently being used for ATS, could be used as rural HSR routes again creating more efficiencies (fuel, maintenance etc.).
7. Indirect savings, eligibility for Provincial/Federal funding etc.

Customer Service Implications:

1. Savings by bringing ATS In-House could be used to improve service.
2. Only the In-House service guarantee continued service to customers.
3. You will have better trained operators to provide excellent and high level of service.
4. Only in house service can assure the ATS users will receive efficient and dependable through the better utilization of staff.
5. By bringing ATS in-house, you will attract more qualified staff.
6. By bringing ATS in-house, you can deal first hand with any complaints and concerns about the service, without going to a third party to resolve issues.
**Employee Implications:**

1. At present the city has invested considerable resources in developing an experienced workforce at HSR that knows the needs of and cares for the clients, by bringing ATS in-house can better utilize their skills and resources.
2. Bringing ATS in-house consistent maintenance standard which benefits both the customers and the employee.

**Other Implications:**

1. An In-House contract would give the City the flexibility to pursue such items as further integration of services, “smart growth”, extended services to rural areas, use of alternative fuels – without having to negotiate the higher costs of profit margin with a third party contractor.
2. Direct control by City Managers and staff would serve to improve accountability.
CUPE Local 5167

Submission
to the
Steering Committee
conducting an
Operational Review of Accessible Transit Services (ATS)

Hamilton City Council

December 2005
INTRODUCTION

CUPE Local 5167 represents 55 full-time and 38 part-time drivers, 8 dispatchers, 1 passenger service representative, 5 maintenance persons, 3 office support personnel and 5 mechanics working for Disabled and Aged Regional Transit System (DARTS). DARTS is the non-profit community agency formed from several other services in 1976 to provide accessible transportation under contract to City of Hamilton's Accessible Transit Services (ATS). Our members provide service on 60 buses from 7:00 in the morning to 11:00 at night – working from 6:00 to midnight – 7 days a week, every week of the year. Many of our employees have been with the service for 15 years or more. Of the 620,000 rides provided through ATS in 2004, 265,000 were provided by the dedicated members of CUPE Local 5167.

CUPE Local 5167 DARTS drivers are the front-line service providers who pick up Hamilton's frailest and least-mobile citizens and deliver them safely to and from their doors to their doctors' appointments, hospital treatments, church services, community programs, work, special events and shopping. We are the people who know the elderly and the medically fragile people and people with disabilities who use accessible transit – know their names, know whether they have someone at home to help them in and out of the door, know whether they had chemotherapy treatments this week, know whether they can tolerate a long trip or whether they will need insulin before 6:00 in the evening and know when they need to be at work. We are the face of the accessible transit service, the people that the users rely on. We are completely committed to our work and our passengers.

We have a lot of information and advice that we can share with the Steering Committee about how to make the service more effective and efficient.
OPERATIONAL REVIEW

This past June, Council decided to undertake an operational review of ATS, “to identify opportunities for increased private sector involvement” and “identify opportunities for increased efficiencies”. At the same time, the Steering Committee was instructed not to consider “policies, practices and procedures impacting quality of service and not [to consider] improving effectiveness and efficiency through service level reductions, deferring capital, increasing user fees or depleting reserves”.

While we are pleased that the Steering Committee will not be considering reducing service levels or increasing user fees, we do not know how anyone can talk about increased efficiencies without impacting on the quality of the service. Or does this imply that the operational review will only examine and recommend efficiencies that it says can be achieved through increased privatization and sub-contracting? Are the conclusions predetermined?

The objective of ATS and each of its components has to be the best possible quality of service. Each decision about ATS must be measured against that objective. In order to realize exactly what is needed, you have to think about who DARTS and other ATS passengers are. Most of them are ill, infirm, aged and severely disabled. Many don’t hear very well. Many don’t adapt to change very well. Many are timid. Many are not very verbal. Many have poor cognitive skills. Only a tiny minority of DARTS service users are competent and independent individuals who only need a special bus, which can hold a wheelchair. The passengers of DARTS are a very fragile and precious cargo. They rely heavily on DARTS staff to assist them in identifying and addressing their individual needs. The Steering Committee and Hamilton City Council must keep the service objective uppermost when making any decisions about ATS.
HYBRID MODEL - SEPARATION OF SCHEDULING FROM DARTS

The Operational Review is to examine the functionality and performance of the current hybrid model. Parts of the service operations are with the City, part are with DARTS and some are contracted out to other service providers.

One aspect of this separation of different parts of the operation that has been particularly troubling for DARTS employees was the transfer of scheduling responsibilities (and schedulers) to the transit department, and the introduction of new automated scheduling program TRAPEZE. Rather than resulting in increased efficiency, this change has reduced both the quality of service and the efficiency of the service. It has also led to deterioration in working conditions for most employees.

Until November of 2003, the schedulers and dispatchers worked side by side in the same office at DARTS. They dealt personally with the passengers calling in for rides and they dealt with the drivers. They got to know the clients and their special needs. Over the years, both drivers and schedulers at DARTS collected this detailed information about each of their individual passengers and recorded it. Does Mrs. G.* have to be picked up at the front door or the back door of the building; which one is wheelchair accessible? When will Mr. D’s caregiver be home to meet him? Mr. M. has chemotherapy on Wednesdays and cannot physically tolerate a long ride home afterward. Their needs could be taken into account in setting up the schedules and the routes. Currently, as a result of the separation, a wall has developed that greatly reduces the flow of vital client information.

* The names assigned in this brief, such as Mrs. G. or Mr. D., are entirely fictional and are used for the purposes of narrative only. They are not associated with any actual DARTS clients or other individuals. We use them to represent the commitment to and knowledge of actual persons that Local 5167 members have to their clients.
When scheduling was transferred to TRAPEZE, this information about individual passengers was simply thrown out! At first, as drivers and DARTS customer service staff came across these individual needs again, they called the information over to the schedulers entering information into the new TRAPEZE system. Now the DARTS drivers have been told to stop that. Passengers have to call in the information themselves -- not to DARTS, but to the City transportation department.

It is not efficient for the passengers to have two organizations to call to register special needs or to complain. The passengers are confused about who does what. This has reduced the relationship with driver and client.

After the drivers complained, they were asked to make a note of problems and issues on forms and hand them in. Which they dutifully did – pages and pages and pages – until they found out, what was being done with the information they were painstakingly writing out, in addition to their regular duties. Nothing! As far as we know, the information remains in a box in a corner of the office. A DARTS manager advised us that there is no one in ATS available to review/handle the information.

The DARTS staff persisted in trying to improve service. Management and the Union set up a joint committee, which met twice. Drivers gave their suggestions about how to improve the service and efficiency, but nothing changed. No further meetings were called. Without ATS' cooperation, DARTS has no way to further or implement the recommendations made by our members.
The Steering Committee is familiar with the system. “Clients” call to book trips. They reserve a time, their “negotiated time”. They have to be ready to be picked up at least 15 minutes before their negotiated time and be willing to wait for 15 minutes after the time and they know that. The drivers have to arrive within the thirty-minute window - no sooner and no later.

Schedulers at ATS enter the basic information about time and location into the TRAPEZE software, which then produces the schedules and routes for the day. But TRAPEZE doesn’t have enough information to produce rational schedules and routes. It doesn’t know there’s a mountain in Hamilton and that it interrupts traffic patterns. It can’t account for construction, or winter storms, or rush hour. It doesn’t know when a driver has to go around several one-way streets to end up with the bus door on the right-hand side of the road in front of the pick-up location. TRAPEZE doesn’t allow for the real time it takes to load and unload the passengers.

The software cannot substitute for human information and commitment to passengers. Recently, a driver had a pick-up at building 123 at 5:00, a different pick up at 5:15 and back to building 123 for a 5:30 – both of those pickups going to the same place. TRAPEZE only looks at the addresses next to each other in the 15-minute slots – and not the one before or after. Many drivers go in at least ½ hour before the shift starts to look at their list for the day and figure out the best routes.

As the Steering Committee is aware, DARTS offers shared service, not individual taxi service. That is, drivers pick up and drop off several people on a route, so passengers aren’t driven directly from the pick-up point to the drop-off point, but will have other stops along the way. TRAPEZE can’t take into account who will be sharing a ride and other limitations on how long a particular person should be on the bus.
With the introduction of TRAPEZE came a change in standards. ATS now accepts that passengers may be on the bus for up to 70 minutes. 70 minutes, not including waiting period! If it’s not rush hour we can get to Mississauga and back in 70 minutes! That’s a long time to be driving around a city the size of Hamilton and makes for an uncomfortable ride for our clients.

Many of the passengers are diapered and 70 minutes on the bus is too long for them. That’s why human knowledge about how ill the passenger is makes a difference. DARTS schedulers and drivers knew that if Mr. K. was having chemo, he wasn’t up to driving around for 70 minutes. They would make sure that at the end of his appointment he would be the last picked up and the first dropped off. The drivers and schedulers know who is diabetic and can’t be driving around town for 70 minutes over their regular mealtime.

Many of the clients go to programs. Programs end at a certain time – say 4:30. Those passengers can’t be picked up 15 minutes in advance. The program hasn’t ended. The drivers know that and can adjust their routes and schedules to accommodate the passengers.

One driver used to do the pick-up for a group of adults with multiple disabilities from Rygiel three days a week to take them to a program at another location. Some of these adults have behavioural problems. One vehicle and one driver picked all 10 of them up, took them to the program on time, picked them up when it ended and took them home. She knew who couldn’t sit next to whom, or across from whom, without starting a fight. Now TRAPEZE has three buses going to pick up the group – all from the same location - picking them up three at a time for some reason, and picking up other passengers on these runs. It could be your elderly grandmother going for a ride with this group of adult men who make loud noises, spit, and throw things.
• Are the drivers licensed as taxi drivers? Are regulations for the drivers to the same standard as DARTS drivers and taxi drivers? Again, we have been informed that some of the drivers were assigned to DARTS after failing to meet the criteria for driving a taxi. Is that the case?

• It has been reported to us that taxi drivers conduct other business while they have DARTS signs on the cars and are wearing DARTS. The City should verify whether this is true or not.

In the view of CUPE Local 5167, the taxi industry does not offer a viable alternative to the professional services currently being offered by DARTS.

Both in-house City operations and a not-for-profit service devoted to disabled and accessible, transit offer more accountability to clients and to City Council than a private for-profit service does.

**CONCLUSIONS AND RECOMMENDATIONS**

Although we are confident that the DARTS service currently far exceeds the levels of service that could be offered by the taxi industry, there are areas of the current DARTS/ATS service that could be improved.

**TRAPEZE:**

• Purchase the missing part of the system (GPS in-vehicle components) the monitoring components that make the whole system a more efficient service method;
• Use TRAPEZE for what it's good for. Allow manual override to adjust for real life contingencies.

Structure Proposals:

CUPE Local 5167 is proposing a different method of scheduling:

• Two different divisions for scheduling:
  1. Input – client data to generate automatic schedules.
  2. Routing – manual override of systems on a daily basis.

The existing system does not properly make allowances for local geography. Research conducted by CUPE indicated that other services continue to rely heavily on human, manual inputs where automated routing and scheduling systems have been introduced. The best way is to combine the human and the computer. Hamilton’s roadways require specialized local knowledge that we believe only human dispatching personnel can provide. The former Region of Hamilton used the combination of automatic scheduling with manual overrides in order to provide superior service to users.

CUPE Local 5167 believes that by using a combination of automatic scheduling with manual overrides the system would:

• Ensure that DARTS has all of the special needs notes about all of the passengers and that these are printed out on the drivers' manifests each time.
• Recognize that there are different types of trips and schedule them appropriately – like the groups going to programs;
• Make it part of the drivers' job to give the highest quality of care to their passengers – not the fastest.
Expand the service:

CUPE Local 5167 members support extending DARTS service to individuals with cognitive disabilities without other physical barriers to mobility as a separate eligibility group for DARTS service. This would be possible with minimal disruption to existing operations since a great number of our current passenger group have cognitive impairments in addition to their recognized mobility issues.

Establish an on-going stakeholder committee:

CUPE 5167 recommends that a joint committee of stakeholders, includes front-line workers, be established to address ongoing service/operational issues.

Thank you for the opportunity to share our thoughts and recommendations with you. We firmly believe that together CUPE Local 5167 members, DARTS and the City of Hamilton, can deliver the highest possible level of service in the most efficient manner to our users.
Veterans
Group of companies include:
Ontario Patient Transfer
Hamilton Cab

Tuesday December 13, 2005

The Steering Committee
For the City of Hamilton

Dear Members:

As a letter of introduction, I thought it would be appropriate to let you know of the family of services Veterans and its consortium can provide the City of Hamilton.

As a long-time supporter of the outstanding work that the City of Hamilton has done in the community, I particularly enjoyed having the opportunity to present this proposal. As you indicated in your letter to me dated November 18, 2005, you were interested in how our company can assist in transportation of the disabled in our community. As Mr. Don Hull, Director of Transit, stated in a media release this year, your expectation for growth of the ATS clientele is in the area of 5,000 riders. This dramatically increases the number of clients of ATS. An enhancement in service levels will have to take place to continue to effectively and efficiently service all existing clients and new clients.

To give you a bit of background on Veterans, its’ associated group of companies and the different types of clientele/deliveries, we offer you the following: Veterans is a for profit company that primarily handles ATS clients through its’ DARTS contract. Hamilton Cab is a Taxi company that operates in the City of Hamilton and is eclectic in its’ varied responsibilities to the community. OPT is a non-emergency patient transfer company that handles both stretcher and wheelchair transportation. As a group we presently service clients on a daily basis in the following areas: Hamilton, Burlington, Oakville, Mississauga, Peterborough, Ottawa, Niagara Falls, Fort Eire, Welland, Port Colborne and St. Catharines. A few of our major contracts at the present time are: The Hamilton Board of Education, DARTS, ATS Taxi Script Program, Trans-Cab, WSIB, Hamilton Health Sciences, Niagara Health Sciences, The City of Peterborough and the City of Ottawa. Presently, between our groups of companies, we have over 500 employees (including our own garage staff) in the communities we service.

On the next page, please find the types of vehicles/employees we presently employ along with the types of services we provide:

467 Charlton Avenue East, Hamilton Ontario L8N-1Z4
1. 200 Sedan Taxi’s
2. Over 250 Taxi broker/owner/drivers
3. 20 Sub-Contracted DARTS Vans
4. 30 sub-contracted DARTS drivers
5. 50 Non-Emerge Ambulance type vehicles
6. 225 OPT employees

7. All OPT drivers are have at least EFR training we also have the following on staff:
   • Paramedics (EMCA) PCP or ACP
   • Emergency Medical Technicians (EMT)
   • Emergency Medical Assistants (EMA)
   • Fire Fighters
   • Registered Nurses (RN)
   • Registered Practical Nurse (RPN)
   • Emergency Physicians
   • Medical Director

8. All OPT employees are bonded.

9. All drivers have abstract and criminal record checks.

10. Five Wheelchair accessible vehicles

11. One Wheelchair accessible bus

Our Transfer Brokerage Model conforms to the IBI study group and others that are presently in place and operational. Through Veterans, OPT, and Hamilton Cab we have Dispatch, Scheduling, Reservations and, of course, Operations that go on 7 days a week, 24 hours a day, 365 days a year. We never close. In total, we handle more than 6,000 rides on a daily basis. Under this Brokerage Model, we can handle same day requests, by the minute call returns, as well as pre-booked subscription requests. We presently transfer everything from parcels (Supply chain logistics and solutions for all package transportation) to stretcher bound clients with full precautions. We follow all Ministry of Health, LTC Facility and Hospital guidelines when dealing with client precautionary measures.

Our certified personnel and vehicle standards meet or exceed all Provincial and Municipal guidelines. Our modern vehicles are fully equipped; our hand picked and extensively trained staff complimented with a computerized dispatch systems produce our high quality of service.

467 Charlton Avenue East, Hamilton Ontario L8N-1Z4
OPT is an authorized provider for all Canadian Red Cross Safety Service Programs. We have our own WHMIS trainer on staff and we can set up custom training programs to meet any corporate, small business, or personal requirement. Our Red Cross and CPR programs are recognized under WSIB, The Canada Labour Code & meet the requirements of the national Occupational Health and Safety Board. We have a TDG (Transportation of Dangerous Goods) training solution for all package transportation.

Our one price service means that you have a guarantee on an annual basis that our price is the only price you will pay. This price of course includes all capital and operational expenses. We can operate and offer you this one price for the simple reason that this is not our only contract and we do not depend solely on one contract to cover all our expenses. In addition, we can offer savings directly to you through our contract since our infrastructure is already in place and administratively we will be able to put more “rubber on the road”.

Since we have a group of companies, we can also help with the City’s future goals of a Community Bus. We are only limited by your requests. Therefore, we can assist you with all of your transportation needs.

We appreciate the opportunity to provide you with this information for your transportation needs. If you require further information please call me directly to arrange a mutually agreeable time. Once again, I would like to thank you for your time and consideration.

Sincerely,

Ron VanKleef
President

467 Charlton Avenue East, Hamilton Ontario L8N-1Z4
Presentation to the City of Hamilton Steering Committee

By Hamilton Consortium

"Veterans Group of Companies"
Presentation to
The City of Hamilton
Steering Committee
By
Hamilton Consortium
"Veterans Group of Companies"

Consortium Profiles

- Veteran Transportation
  - Vet Link program since 1998 with 35 million riders
- Hamilton-Wentville service began in 2015 with 2 million riders
- Hamilton GAC
- Bone Service - One Million in demand since 1998
- AEI - Two Non-profits - $300 Million annual fixed
- 1830 - Tri-County program - 100,000 Annual Riders
- Veterans' Home - Veterans' Home
- Hamilton Township - 500 Riders - 500 Annual Riders
- Napan Health - 1500 Riders - 1500 Annual Riders
- The Cuyahoga Community Behavioral Health - 600 Riders

Customer Identified Needs

- Quality
- Value
- Customer Satisfaction
- Service
- Increase of available rides
- On demand service
- Ability to pre-book in real time
- Increase of quality of service
- A value of service based on equal access to all residents within the community
Meeting the Needs

- 24/7 service is an increased role assisting in client satisfaction
- Our proven service delivery model
- Change Management
- Dedicated Van Service
- Manpower Accessible Service
- Non Urgent Medical Transportation
- Customer / Client Satisfaction
- Improve City Image
- Safety, Security
- Better Service

Our Strengths

- 24/7 Service
- Dedicated Van Service
- Manpower Accessible Service
- Customer / Client Satisfaction
- Improve City Image
- Safety, Security
- Customer / Client Satisfaction
- Improve City Image
- Safety, Security
- Customer / Client Satisfaction
- Improve City Image
- Safety, Security
- Customer / Client Satisfaction
- Improve City Image
- Safety, Security

The Need for Change

- The City of Hamilton has identified a need for change within the current DARTS Service
- The City of Hamilton expects improvements in accessibility, efficiency and effectiveness on the current Para transit system
- The City of Hamilton seeks to achieve a Private / Public partnership solution
Next Steps

- We are requesting to be involved in the future development, planning and delivery of services.
- We would like the opportunity to present to the City of Hamilton our detailed business plan at your earliest opportunity.

Conclusion

- Utilizing the strengths of our affiliated companies.
- Years of experience.
- Varied management expertise.
- Existing infrastructure.

Thank you.
Councillor Whitehead, Councillor Merulla, Councillor Morelli, Councillor Collins, Mr Hall,

Thank you for asking me to address your committee today. You are probably aware my father and I own and run Blue Line Taxi. Our company has grown to be the largest in the City and I think; if you use the eight consecutive Hamilton Spectator Readers Choice awards we’ve won as a benchmark, it is arguably the best taxi company too.

So far this year we have done over 2 million rides using just over 200 taxis and 500 drivers. We have another 50 office and dispatch staff. We’ve been open 24 hours, 7 days a week every day of the year since 1984. We know what we’re doing when it comes to transporting people.

We’ve made proposals several times for some or all of the DARTS business and been rebuffed each time. In 1996 DARTS issued an RFP for their ambulatory business. Once the contract was awarded the successful bidder failed to follow the requirements for low floor, air conditioned vans and uniformed drivers instead using ex taxi and livery sedans and 10-year-old vans manned by drivers wearing sweat pants. This change, apparently acceptable to DARTS, effectively overpriced every other bid. The successful bidder had also been given listings of the trips and cost of the ambulatory passengers handled by JENC by an individual at DARTS. This too was a huge and unfair advantage.

In 2000 we partnered with Laidlaw Transportation to reply to an RFP and were not even given a formal reply. Today although I’ve been asked to comment on the future of accessible transportation services I’m faced with the reality that the City, DARTS and Veterans have a contract in place that runs until sometime in 2008.

Recently at the request of DARTS we proposed an alternative service delivery method, which we were sure would save DARTS a considerable amount of money. The response? A request by a member of council to quit talking to us.
As a taxpayer in this City I have to ask why the ambulatory contract is simply “awarded” each time instead of being tendered.

If the DARTS service provided timely cost effective service to the disabled community in the City of Hamilton and there was nothing that couldn’t be improved on, then that would be an appropriate response. Frankly, I don’t think that’s the case.

I don’t want to dwell on what I see as shortfalls in the current DARTS service but I would like to give you a couple of things to think about.

DARTS presently uses the “ELF” buses to transport wheelchair passengers. These buses cost upwards of $220,000.00 and in theory will accommodate 6 to 8 wheelchair passengers. In practice, they rarely carry more than 2 passengers.

Contrast this with the 8 wheelchair accessible vans that could be purchased for the same money. They can each carry 2 passengers and can go to eight different places simultaneously. Run by the taxi industry with independent contractors they immediately provide a 100% increase in capacity and would offer eight times the flexibility.

In 2000 the DARTS annual budget was $6.1 million, by the end of 2004 that had grown to $9.5 million. As the City’s population continues to age there will be a continued need for more money.

So long as DARTS continues to be the City’s only choice for providing accessible transportation services, private sector companies will be unable to flourish. That comes at a steep price both to the taxpayers of this City and to the users of accessible service.
I think the service to the disabled community can be improved enormously and the costs of doing so could be shaved dramatically. I’m prepared to work with the City to accomplish this but my experience to date suggests decisions are often made behind closed doors and not always to the advantage of the citizens of our City.

Anthony R. Rizzuto  
Vice President  
Blue Line Taxi  
December 13th, 2005
Accessible Transportation Services
Review Steering Committee

Tuesday, December 13, 2005

Presentation by Advisory Committee for Persons with Disabilities

Recommendations on the Future Directions of ATS Program

1. **FUNDING RESPONSIBILITIES**

   - Should be a shared responsibility between governments
   - Federal, Provincial and Municipal
   - Ministry of Health – responsibility for dialysis
   - Ministry of Community & Social Services responsibility for disabled adult & seniors day programs
   - Cost recovery should be for actual service costs, not only the fare price
   - Persons with disabilities should continue to pay but fee options should parallel HSR fares for other riders
Recommendations on the Future Directions of ATS Program

2. **ELIGIBILITY CRITERIA**
   - Need for diversity and to be inclusive
   - Too many potential users currently ineligible
   - Seasonal users need to be considered
   - Greater all-season access to HSR

Recommendations on the Future Directions of ATS Program

3. **EXPANSION OF SERVICES**
   - Service should parallel HSR hours of service
   - Service fees should parallel HSR fees and fare options
   - Need for a ticketless approach to bus fare system
   - Need for parallel taxi service with parallel taxi fees
Recommendations on the Future Directions of ATS Program

4. **ATS AS PART OF A STRATEGIC TRANSPORTATION SYSTEM**

- Need for a strategic transportation system within the City involving public transit (bus, DARTS) and private service (taxi)
- System needs to incorporate pedestrian, cyclists, and other modes of safe transportation
- System needs to ensure roads and sidewalks are passable at all times, during all seasons
- System needs to ensure all people have equal access to transit service systems at all times (eg. no service cancellations)

Recommendations on the Future Directions of ATS Program

5. **GOVERNANCE**

- Users (persons with disabilities) need to be entrenched in all levels of service governance
- Users of the service must be part of both public and private sector governance
- ACPD and transportation sub-committee require more active consultation
- Need for regular evaluation guided by performance benchmarks
- Adequate policies for system to establish benchmarks
Questions?

THANK YOU!
Seniors’ Advisory Committee Presentation

Accessible Transportation Review

December 13, 2005

Policy Development Process

INPUTS  POLICY DEVELOPMENT  IMPLEMENTATION

SAC

User Group

City

POLICY
Critical Factors

- Customer Service Focus
- Information and Communication
- Accurate Measurement and Feedback
- Fair Appeals Process

As if it were you.....

Customer Service Focus

- Simple and Accessible Process
- Dependable and Reliable System
- Fair and Friendly Providers
- Empathetic and Compassionate Service

...Helping Hands
Information and Communication

- Simply Written Policies and Procedures
- Provisions for Client Orientation
- Consideration of multicultural needs
- Appropriate and timely information
- Let the ‘KISS’ Process Prevail

Appeals Committee Structure

Users
User Reps
City Reps
Ratepayers

Accountability
Integrity
Fairness

‘Building Client and Public Trust’
Elements of an Effective Appeals Panel

- Service Focus
- Balanced Membership
- Publicized Policies and Process
- Timely and Transparent Decisions

Measurement and Feedback Surveys

- Inputs:
  - Passengers and Attendants
  - Drivers and Schedulers
  - Health Providers and Care Givers

- Ensure:
  - Accuracy and Appropriateness
  - Confidentiality for Respondents
  - Effective Sample Size

- Report Regularly
  - User Groups & Stakeholders

- Focus on Improvement

"...with a little help from your friends"
Thanks for Listening

*SAC is Ready to Help Develop an Effective Policy!*
City of Hamilton - Accessible Transportation Services (ATS)

Report PW(05075)
Public Works Stakeholder Presentation to ATS Peer Review Committee

By: Scott Stewart; Don Hull; Paul Thompson
February 07 2006

Council Direction

- "That staff be directed to explore options on providing accessible transportation to people with disabilities through a partnership and/or a Request for Proposal with a private sector transportation company".

- "That staff report back on the cost of an operational review of DARTS transportation to find internal efficiencies".
Staff Report (PW05075)

Recommendation (a)
- That Staff be directed to carry out a limited scope Peer Audit Review of the ATS program, defined by the Terms of Reference, for the purpose of evaluating the potential for improvements in efficiency & effectiveness that could be achieved through variations in the level of City or private sector involvement in the current ATS program structure.

Recommendation (d) – as amended by Council
- That “the Steering Committee of Council” would report back with any recommendations.

Peer Review Key Deliverables

Are there any opportunities to reduce cost or improve quality of the ATS program:

- Within the current “Not-for-Profit” (NPO) model that partners the City with the NPO.

- Through the City assuming greater control through variations in the current model – up to all “in-house”.

- Increased involvement of the private sector through an RFP.
Current ATS Model

- Hamilton City Council
- Reporting through City Senior Management
- Five Year Operating Agreement between City & DARTS
- Operating Contract between DARTS & Vets
- Contracts between City & all Hamilton Taxi Companies
- Public Works Transit Division ATS Office
- DARTS
- Sub-Contract (Vets)
- Taxi Scrip Program
- HSR ALF Service
- ATS coordination with HSR on ALF services

Terms of Reference

- Cost Efficiency – cost of service/hr; cost of service/trip
- Cost Effectiveness – cost of service per capita
- Client Satisfaction
- Performance
- Governance
- Structure
- Trip Purpose
- Stakeholder Consultation
- Peer Review
What the Stakeholders said:

- DARTS – identified the opportunity for increased revenue through charging Provincial Ministries for guaranteed trips to programs.
  - At the DARTS Board meeting, DARTS Exec. Director specified $3 million in revenue from Provincial Ministries if given more autonomy.
  - Essential that DARTS Board report directly to Council.

- VETS - promised $1.5 million in savings if given control of DARTS.
  - Contract oversight would be through staff.

- CUPE - promised cost savings if more control is given to DARTS through rebundling of Reservations, Scheduling & Dispatching with control by DARTS.
  - Would be amenable to negotiations of two-tier driver rate to allow accommodation of direct delivery of ambulatory trips. Amount TBD.

- ATU - promises cost savings if entire service is brought "in-house".
  - They would negotiate wage harmonization with City workers that would be offset by savings they would achieve through economies of scale. Amount TBD.

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Terms of Reference: What the Stakeholders said (cont'd):

- Blue Line
  - Wants assurance of a competitive bid process when the current contracts expire or when new services are added.
  - Metered rate is the appropriate means of compensation.

- Council's Advisory Committees
  - Want higher level input on policy, more consultation, performance oversight.
Terms of Reference: Other findings

- Cost Efficiency (cost/trip; cost/hour)
  Good - relative to industry benchmarking and attributable to two key factors: lower wage and benefits associated with NPO and complex "family of services" service delivery model.

- Cost Effectiveness (cost/capita)
  High cost/capita - due to service levels, Hamilton's investment in specialized transit is among the highest in the country (grandfathered ambulatory disabled, broadened eligibility including Alzheimers & Dialysis, low denial rate, service to full urban area, progressive social policy).

---

Terms of Reference: Other findings

- Client Satisfaction
  - Good client satisfaction:
    - With ATS office, DARTS and VETS service delivery.

  - Client dissatisfaction focuses on:
    - Lack of assurance of trip availability 100% of the time either through advanced booking and/or same day booking.
    - Insufficient service availability is wrongly attributed to the processes of Reservation, Scheduling, Dispatching.
Terms of Reference: Other findings

- Performance
  Productivity (trips per hour) is average to above average relative to industry standards. Measurable improvement in 2005 attributable to improved proficiency in software applications – result – productivity exceeded budget -more trips in fewer than budgeted hours:

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<th>2005 Actual</th>
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<tr>
<td>Trips</td>
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<tr>
<td>Trips/hr</td>
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<td>1.90</td>
<td>1.92</td>
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<tr>
<td>Kms/trip</td>
<td>10.73</td>
<td>10.80</td>
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Note: Financial performance to budget, year end negative variance due in some part to unbudgeted expenditures.

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Terms of Reference: Other findings

- Governance
  Critical issue for Staff.
  Successful models identified:
  - Kingston – Autonomous NPO with Commission status
  - Calgary - City directed brokerage including an NPO
  - Ottawa – City directed contract with private-for-profit service provider
  - Toronto – “In-house” with supplementary private-for-profit involvement
Terms of Reference: Other findings

- Initiatives underway or committed to that impact the ATS Program efficiency and effectiveness:
  
  - New service policies and services in accordance with OHRC settlement.
  - Revised eligibility policy and registration procedures.
  - Additional training and experience with new software, to achieve optimal productivity.
  - Cost benefit analysis of high floor versus low floor fleet.
  - Implementation of Interactive Voice Response (IVR) to confirm reservations and cancel trips.
  - ATS program has 1.5 FTE management positions. Supervisor position has been vacant since January. Nation-wide recruitment yielded no fully qualified candidates.

Terms of Reference: Other findings

- Peer Review

The initial peer review that proceeded this study concluded:
  
  - There were major cost increases associated with transition to an all in house (includes service delivery) model in Grand River and Toronto.
  - Skilled staffing shortages plagued the entire industry.
  - Reservations, scheduling and dispatch functions need to be bundled and should reside with the City.
  - The current governance model and structure is untenable.

Note: Reconvening of Peer Review team pending direction of Committee
Critical Review Considerations:
Program History

The Disabled and Aged Regional Transit System (DARTS), a non-profit, private corporation formed in the mid-1970's to provide accessible transportation for persons with disabilities and the frail elderly for the City of Hamilton.

- From - a small, five-vehicle operation with ten employees
- To - a complex, 66-vehicle City-owned fleet, NPO operations with 110 employees and supplementary taxi sub-contract with 20 vehicles, operating under management of an NPO to deliver 400,000 individually scheduled trips to 8,600 registered clients annually employing a complex software application.
- Annual operating budget of $12.5 million, revenue of $2 million, Hamilton's Specialized Transit program is larger than most Canadian Conventional Transit operations.

Critical Review Considerations:
Program History (cont'd)

- History (cont'd)
  The Hamilton Specialized Transit Program has been the subject of recurring controversy and program reviews for more than the past decade characterized by significant senior management, middle management, Board Chair and Board member turnover.

- Since 1993:
  - 5 General Managers, 5 Board Chairs

- Attributable to Relationship conflicts/failures

- The ongoing and occasionally severe strains in relationships are adversely impacting program delivery.
Other Critical Review Considerations:
Program Cost Forecast

- The ATS program will continue to face extraordinary pressure to increase expenditures well in excess of inflation due to a number of factors:
  - Costs related to transportation programs: fuel, facilities, utilities, labour intensive program
  - Council’s consideration of broadening of eligibility in early 2006
  - Evolving legislation (AODA, ESA, OHRC)
  - Pressure to match capacity with demand (no trip denials)
  - Growth in Provincial programs without recognition for transportation: e.g. Dialysis, Adult day programs; day hospital; reluctance to coordinate scheduling with transportation providers.
  - Aging population, longer life span
  - Transition of clients from ambulatory to wheelchair confined with aging
  - Frail elderly attraction to the high quality of service
  - Policy change pressures: fare and service level harmonization with conventional transit
  - CBA wage & benefit parity with City
  - Hamilton’s progressive Social Services policies

Slide 17

Other Critical Review Considerations:

- CBA negotiations between DARTS and its employees in abeyance
  - Council may ultimately be drawn into negotiations.

- Potential for ATU to make application to the OLRB
  - That City is the “common” employer of DARTS employees.

- Staffing vulnerability
  - DARTS rate of middle and senior management turnover
  - Inability to recruit experienced middle management into the ATS field. Current recruitment for an ATS Technologist underway.

Slide 18
Conclusions: Staff evaluation of Stakeholder recommendations:

- DARTS - $3 million in increased revenue if given autonomy.
  - Stated method for achievement would breach Ontario Human Rights Code and would breach City Terms of Settlement with Ontario Human Rights Commission.

- VETS - $1.5 million in overhead savings if given control of DARTS.
  - Not achievable, current overhead < $1.5m

- CUPE - Cost savings if more control is given to DARTS. Amount TBD.
  - Misconceived perception that unbundling of Reservations, Scheduling & Dispatch has led to lost productivity.
  - Perception that uploading ambulatory sub-contract trips will result in savings is inconsistent with long-term industry experience.

- ATU - Cost if brought "in-house". Wage harmonization with City workers would be offset by savings they would achieve through economies of scale.
  - Inconsistent with the experience in other municipalities that have brought service delivery in-house.

Other Critical Review Considerations:

- Outstanding Council directed initiatives are being held in abeyance pending the outcome of this study:
  - Eligibility and Registration Policy revisions;
  - DARTS permanent accommodations;
  - ACPD recommended accessible taxi demonstration project.

- DARTS Board
  - A decision to diminish Board autonomy could further destabilize the Board or trigger a decision by the Board to re-consider its value to the City.
Conclusions

- The current hybrid model must continue to evolve toward either:
  - Kingston model: Full autonomy for the NPO (direct report to Council as an external Commission)
  - Calgary model: City directed brokerage including an NPO and Private-for-profit service providers. Staff voting representation on NPO Board; exclusion of Council representation.
  - Ottawa model: City directed contract with private-for-profit service provider(s).
  - Toronto model: "In-house" with supplementary private-for-profit involvement

Recommendations

- Changes to ATS program to resolve Hamilton's specific identified, emulating the Calgary model:
  - Retention of NPO (DARTS)
  - Greater use of private-for-profit contracted service delivery
  - Council confirmation of ATS program accountability to Public Works:
    - Appoint Director of Transit as permanent Vice-Chair and voting member;
    - Appoint Manager of ATS as voting member;
    - Discontinue Councilor membership.
    - Appointment of DARTS Board members by Council's sub-committee for ABC appointments.
Recommendations

- Creation of a program Strategic Plan within 6 months identifying clear roles & accountabilities
- Creation of a trip "Brokerage":
  - Creation of a Brokerage Manager (3-year contract) by the City;
  - Dual reporting of Brokerage Manager to Board and City;
  - Re-bundling of Reservations, Scheduling & Dispatching; Sr. Transit Technologist reporting to the Brokerage Manager;
  - Staff to provide a progress report back in 6 month intervals on the functionality.
- Restructure private-for-profit participation in co-ordination with expiry of existing agreement between DARTS and VETS in 2007 to supplement NPO prior to contract expiry in 2008.
SUBJECT: Accessible Transit Services (ATS) - Consideration of an Operational Review (PW05075) - (City Wide)

RECOMMENDATION:

(a) That Staff be directed to carry out a limited scope Operational Review of the Accessible Transportation Services (ATS) Program, defined by the Terms of Reference attached to this report as Appendix “A”, specifically, to undertake a peer review for the purpose of evaluating the potential for improvements in efficiency & effectiveness that could be achieved through variations in the level of City or private sector involvement in the current ATS program structure.

(b) That Council authorize funding for the Operational Review from the Transit Working Fund Reserve DeptID #112405 at a cost not to exceed $50,000 in total.

(c) That Council create a Steering Committee for this Review comprised of interested members of Council, Staff representing Transit, Finance & Administration and a Consultant from the Public Works roster.

(d) That Staff report back to Council on the findings and recommendations of the Operational Review no later than October 2005.

Original Signed By

Scott Stewart, C.E.T.
General Manager
Public Works
EXECUTIVE SUMMARY:

Council directed, at their January 26, 2005 meeting: “That staff be directed to explore options on providing accessible transportation to people with disabilities through a partnership and/or Request for Proposal with a private sector transportation company”.

Council further directed, at their March 23, 2005 meeting: “That staff report back on the cost of an Operational Review of the Accessible Transit System to find internal efficiencies”.

The City Manager and Corporate Management Team (CMT) have committed to Council to conduct Operational Reviews of all City programs. The process for establishing priorities and timelines for the above activities was to begin following completion of Council’s 2005 budget deliberations.

A full scope Operational Review of the Accessible Transportation Services (ATS) program is estimated to be in the order of $100,000 and would include an efficiency and effectiveness impact assessment resulting from:

- changes to Council policies including, for example:
  fare policy, service area, hours of service, and the taxi scrip program, etc.
  A report to Council from Council’s Accessibility Committee for persons with disabilities (ACPD), attached as Appendix “B” recommends against efficiency improvements at the expense of current service levels.

- alternate service delivery models including:
  a) all in-house;
  b) variations on the current hybrid model whereby essentially the City provides client trip planning; DARTS provides non-ambulatory trip delivery and a sub-contracted van service provides ambulatory trip delivery;
  c) RFP for private-for-profit service delivery of all non-ambulatory and ambulatory client trip delivery.

To assist in the preparation of this report, staff consulted with Accessible Transportation Managers from the City of Ottawa, Peel Region, the Region of Kitchener-Waterloo and the Acting General Manager of D.A.R.T.S. The consensus of opinion arrived at by this broad range of experienced managers was that should Council desire to proceed with an Operational Review at this time, that the review be in the form of a peer review and be limited in scope to currently known areas of the program where improvements in efficiency & effectiveness may be achieved beyond those that have already been or are currently been explored.

A limited scope “Peer Review” estimated to cost less than $50,000 would be confined to:

- An evaluation of variations on the current hybrid model as described in paragraph b) above.
- An update on a study conducted in 2003 on the Cost & Quality implications of the ATS program being provided: fully “in-house”; through the current hybrid model; and through a private for-profit service provider.
The expectation of the review would be to provide Council with a comparison of the current structure of the ATS program to that of other leading specialized transportation service providers across Canada and to provide Council with an opinion on how the functionality, financial and social performance City of Hamilton’s ATS program might be further improved through variations on the current hybrid model based on some successful practices in other municipalities. The study will also provide Council with background and an update on a study conducted in 2003 respecting the cost and quality implications of a full in-house or a fully privatized ATS program.

Although the Accessible Transportation Services (ATS) Program has not as yet been specifically identified as a priority of Council for an Operational Review, Staff has structured this report so as to provide Council with sufficient background information to make informed decisions on whether to proceed with an Operational Review in part or in whole for this particular program at this time and, if so, to define the scope of the review. In the event that Council directs that an Operational Review of the ATS program proceed, a carefully considered and defined scope for the review will ensure the best use of scarce financial and human resources and assure a timely response upon which Council can make further decisions affecting the efficiency or effectiveness of the program.

In considering the need for an Operational Review it is noted that there are a number of initiatives either underway or completed that impact the ATS Program efficiency and effectiveness:

- Staff will be undertaking a cost benefit analysis of high floor versus low floor fleet upon delivery of the buses later this summer.
- New policies and services are to be implemented in 2005 in accordance with Council’s settlement reached with the Ontario Human Rights Commission (OHRC) and Council’s approval of the associated budget.
- Staff has been directed to report to Council with recommendations for the implementation of a revised eligibility policy and registration procedures. New service policies and services are to be implemented in 2005 in accordance with Council’s approval of the associated budget.
- The City has procured and installed a new reservation, scheduling and dispatching software application for the ATS program. This system is fully operational but requires additional training and experience with the product, as well as near term technical resources, to achieve optimal productivity.
- The Division’s Automated Telephone Information System (ATIS) will be replaced over the summer. A component of this new technology includes an Interactive Voice Response (IVR) module for the Specialized Transit program. It will enable DARTS users to confirm reservations and cancel trips without the need to talk to a reservationist. The benefits will be reduced call-wait times for DARTS clients who need to talk directly to a reservationist and a more manageable workload for both DARTS and ATS staff. There are currently times of the day when call-wait times are excessive due to staff limitations. This technology presents an alternative to adding staff to solve an ongoing problem.
- The ATS program has 1.5 FTE management positions, a half-time Manager and a full-time Supervisor. The Supervisor position has been vacant since January. A nation-wide recruitment yielded no fully qualified candidates. The vacancy is
currently being filled on a part-time basis through the services of a consultant on a fixed-term contract.

Notwithstanding these recent initiatives, there are aspects of the overall ATS program that are felt to warrant investigation. These include:

- The functional relationship between the ATS office, DARTS and the DARTS sub-contract ambulatory van service with Veterans Transportation.
- The most effective utilization of the sub-contracted van service for ambulatory client trips.
- Expansion of the sub-contracted taxi service to include wheelchair accessible taxis.
- Consideration of other contractual private sector services to meet off-peak or periodic demand (ex. Use of metered rate sedans, taxis, etc.)
- The overall service delivery strategy for the prescheduled door-to-door services currently operated by DARTS and Veterans Transportation should be reviewed in comparison to the experience of other peer services.
- City ownership of the vehicles used in the sub-contracted van service should be considered in view of current provincial funding policies to determine whether cost savings to the City may be achievable.

Recognizing there has been a considerable amount of work completed to date, it is recommended that the operational review should generally limited to specific areas of concern.

The approach that Staff has taken towards preparation of this report is based on a recent publication: “A Guide to Service Delivery Review for Municipal Managers”, prepared by the Ontario Ministry of Municipal Affairs and Housing, August 2004 in partnership with:

- Ontario Municipal Administrators’ Association (OMAA)
- Association of Municipal Managers, Clerks and Treasurers of Ontario (AMCTO)
- Municipal Finance Officers’ Association of Ontario (MFOA)

In adopting this approach to this report, Staff aims to provide Council with the broadest possible perspective on a public sector Operational Review as it would relate to the ATS program by relying on the collective experience of an extensive range of senior public sector administrators on the subject of Operational reviews.

This guide provides a comprehensive and systematic approach to service delivery review of municipal programs. The approach is structured around 6 stages, as follows:

1. Getting organized for service Delivery review.
2. Establish performance outcomes and service standards.
4. Consider internal service improvements and/or Investigate other feasible service delivery methods.
5. (For external service delivery methods) Select service provider.
6. Implement, evaluate and report.
BACKGROUND:

The information/recommendations contained within this report have City wide implications and relate to matters/facilities/programming/property within the entire City.

The Accessible Transportation Services (ATS) program was established in the mid-1990's to manage the orderly development of specialized transit services for persons unable to use conventional HSR public transit service due to a disability. The overall program has grown and the range of services has expanded to provide greater mobility to persons with special needs.

The specialized transit services provided to persons with disabilities through this program include:

- Accessible low floor bus (ALF) service on designated trips on most HSR bus routes. This service accommodates trips by persons in wheelchairs and other mobility devices in two designated self serve spaces on the bus. No fare is charged to persons in mobility devices. There are currently over 38,000 annual bus trips by persons in mobility devices. This service commenced in 1996 and has expanded to over 60% of the HSR bus fleet.

- Taxi scrip service is available to all ATS clients. Clients are able to purchase up to $80 worth of taxi scrip coupons per month at 60% of face value for use in purchasing taxi service directly from any taxi company in Hamilton. It offers flexibility and spontaneity of travel not available through the prescheduled services. Almost 180,000 annual trips are provided through this service.

- DARTS is a core service, providing prescheduled, door-to-door service for registered clients who meet the specific criteria for this service. It has been established for over 25 years and offers a high quality of service for persons who may not be capable of utilizing other service components. DARTS currently provides almost 265,000 annual trips (2003) for both ambulatory and non-ambulatory clients.

- The sub-contracted van service operated by Veterans Transportation provides prescheduled door-to-door service for registered, eligible clients who are ambulatory and able to use the mini-van vehicles used for this service. This service currently provides about 137,000 (2003) annual trips.

The Ontario Ministry of Municipal Affairs and Housing has recently released a document outlining an approach to conducting service delivery reviews for municipal services. This document, entitled “A Guide to Service Delivery Review for Municipal Managers” has been created to assist municipal managers in improving the delivery of services through (a) providing better customer service and operating more efficiently, and (b) expenditure management by setting goals and priorities, managing demand and evaluating performance. The guide lists common considerations that may act as a catalyst to trigger consideration of a program review. From the larger list provided in the document, many may either apply or have the appearance of applying to the current state of the ATS program and may influence Council’s interest in considering of a review at this time:
<table>
<thead>
<tr>
<th>Common Considerations</th>
<th>Status of ATS Operational Review Initiatives underway and planned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unable to meet demand or rising citizen expectation about greater choice or better</td>
<td>The highest priorities of staff are:</td>
</tr>
<tr>
<td>service or accessibility</td>
<td>To implement the service level improvements and to introduce the performance monitoring required by the OHRC settlement</td>
</tr>
<tr>
<td></td>
<td>To report to Council with an implementation strategy for delivering the recommended Eligibility and Registration policy</td>
</tr>
<tr>
<td>Potential for cost savings or other improvements</td>
<td>An initiative showing potential for cost savings is the transition from low floor ramp equipped fleet to high floor lift equipped fleet.</td>
</tr>
<tr>
<td></td>
<td>New high floor buses are on order and the evaluation will begin later this summer.</td>
</tr>
<tr>
<td></td>
<td>Implementation of the Transportation Demand management strategies previously identified for Council consideration in report TOE02075: all HSR fleet low floor accessible; travel training; trip by trip eligibility for DARTS, integrated trip transfers; functional eligibility; zone fares; advance reservation/scheduling dispatching software technology; use of sub-contracted services; agency co-payments; changes to DARTS operational standards.</td>
</tr>
<tr>
<td>Experiencing unsustainable growth in costs related to fuel, energy, maintenance,</td>
<td>A successful evaluation and implementation of high floor fleet is a promising initiative underway towards finding offsetting expenditure efficiencies.</td>
</tr>
<tr>
<td>insurance, etc.</td>
<td></td>
</tr>
<tr>
<td>Unable to meet or exceed quality or consistency targets</td>
<td>A Customer contact database has been established to ensure all complaints are recorded and investigated. The feedback provides valuable insight as to where to focus improvement initiatives.</td>
</tr>
<tr>
<td></td>
<td>The automated scheduling software for reservations, scheduling and dispatching purchased and implemented in late 2003 continues to be refined. Staff is receiving training to assist in the transition from a manual to a sophisticated system. Productivity is showing signs of sustained improvement.</td>
</tr>
<tr>
<td>Could be delivered by another provider that has indicated a capacity and willingness to take over delivery</td>
<td>The recommended limited Operational Review would respond to this specific direction of Council.</td>
</tr>
<tr>
<td>Require significant changes to meet legislative changes</td>
<td>Staff is focused on implementing the service changes arising out of the OHRC settlement.</td>
</tr>
<tr>
<td></td>
<td>Staff must now focus on revisions to Council’s eligibility policy to minimize any further delays and to mitigate the opportunity for another complaint.</td>
</tr>
<tr>
<td></td>
<td>The City is in the process of responding to an Ontario Human Rights Commission position paper that could have profound impact on ATS policy, most specifically Eligibility policy</td>
</tr>
<tr>
<td>Have experienced significant personnel change that threaten effective delivery</td>
<td>The ATS office functions with 1.5 management staff to administer policy, manage service delivery contracts, manage day-to-day functions related to reservations, scheduling, customer service, eligibility &amp; registration, and respond to ongoing pressures to change and expand.</td>
</tr>
<tr>
<td></td>
<td>The ATS program has a half-time Manager and a full-time Supervisor allocated to manage the $10M program. The Supervisor position has been vacant since January. An internal and external national search yielded no fully qualified candidate. A consultant has been engaged on an interim basis while staff at Transit and Human Resources attempt to find a solution.</td>
</tr>
</tbody>
</table>
The guide provides an overall approach that identifies the key steps required for a systematic and comprehensive review of the delivery of a municipal service such as the ATS program.

The guide inventories the traditional approaches to managing spending:

- Across-the-board cuts to all services,
- “Cherry picking which services to cut,
- deferring capital projects,
- increasing user fees,
- dipping into reserves.

Experience has demonstrated that the above approaches tend to result in a comparable reduction in service, an approach Council has been strenuously trying to find alternatives to.

The guide offers an alternative. It has been created to help senior managers of municipal departments in Ontario in their ongoing effort to improve (a) service delivery by providing better customer service and operating more efficiently, and (b) expenditure management by setting goals and priorities, managing demand and evaluating performance. The stated purpose for the creation of this document appears to closely match what Council is directing Staff to report on.

The process begins with responding to 10 generic questions that are provided in the accompanying presentation to this report. The first and most important question is: “Do we really need to continue to be in the business/service”. Council has a legal obligation to provide a reasonable level public transit for persons with disabilities.

**Step 1: Getting organized for service delivery review**

The Accessible Transportation Services (ATS) program currently has a net tax capital and operating inclusive levy of approximately $10M dollars in 2005. The ATS program is a complex program involving very specific customer needs, a number of different services and has a high level of visibility in the community.

The ATS program can be separated into functional components and which, depending on the degree of detail of evaluation desired, can be further separated into activities within the functional components. Council has expressed an interest in reviewing the current state of private and not-for-profit sector involvement. Most of the ATS program is currently provided by the private sector. Approximately 93% of the $8.7 million Operating Budget resides in the private sector. The functional areas of the program and provider of each are as follows:

- Policy administration is provided in-house. Council sets policy to establish goals and priorities, manage demand (eligibility policy, fares, service area, etc.) and provide for program performance evaluation.
- Customer services are provided in-house. In the past year, a parallel system to HSR was implemented to receive, record and respond to all Customer Contacts.
- Client registration is provided in-house. Staff process approximately 2,000 new applications annually.
Scheduling of DARTS trips is undertaken in-house. With the acquisition and implementation of automated scheduling software, this function was transferred to the City from DARTS in 2004.

Dispatching of DARTS and sub-contracted van trips – Private not-for-profit (DARTS)

Dispatching of DARTS and sub-contracted van trips – Private not-for-profit (DARTS)

Taxi scrip service delivery - Private for-profit subsidized taxi

Accessible low floor (ALF) bus service delivery - Municipal (HSR)

Door-to-door prescheduled service delivery (D.A.R.T.S.) - Private not-for-profit

Subcontracted van service delivery - Private for-profit.

Step 2: Establish performance outcomes and service standards

The ATS program has a long history of established service standards and industry accepted performance measures.

Step 3: Understand and evaluate current performance

The Province of Ontario requires annual reporting of the financial and operational performance of the ATS program. Equipped with this information, Staff is able to provide Council with an evaluation of the program performance relative to current Council policy and standards and to peer programs throughout Canada.

While the ATS service performance compares very favourably with similar services in other communities, there are recognized areas within the program where efficiency and effectiveness improvement have been identified and are at various stages of review or have been identified for review at a future date.

Essentially, staff has completed Steps 1-3 and has provided the information within this report for Council’s consideration and is seeking direction on next steps.

The Guide to Service Delivery Review has been a valuable tool for staff in preparing a response to Council on this topic. It has forced a structured review and inventory of initiatives underway to: improve the overall efficiency and effectiveness; improve customer services; and address demand management of the ATS program. It has helped to identify future initiatives for consideration of review. Finally, it has helped Staff to reaffirm our strategic goals and set priorities.

ANALYSIS OF ALTERNATIVES:

Council has directed staff to develop a suitable approach to conduct an operational review of the ATS program in order to control or reduce costs, to ensure provision of satisfactory mobility in the community for persons with disabilities and to secure full value for money spent. Further, the City Manager and Corporate Management Team have set out a strategy of carrying out operational reviews of all City programs over the next few years.

To conduct the necessary investigations, several alternative approaches have been considered, as described below.

In-house Operational Review Study:

City staff has the necessary expertise and experience to conduct a detailed operational review for a program such as the ATS Program. Further, the staff of the Transit Division is very familiar with the detailed operations of the services and the various issues
related to the service delivery. However, there are several significant limitations to this alternative:

- The Transit Division has limited resources to dedicate to a review. This program has 1.5 FTE, a half-time Manager and a Supervisor, with the Supervisor position currently vacant.
- The Division has other high priority projects underway, which require the direct involvement of the Manager of ATS & Fare Administration (e.g., GTA Farecard Project; implementation of OHRC settlement policies, procedures and new services; implementation of Eligibility & Registration policy and new services). There simply are not sufficient staff resources in-house to undertake the necessary investigations and study reports required for a study of this magnitude.
- Some aspects of the study will involve determining the most appropriate service providers and the relationship between different parties involved. An in-house study team might be perceived as favouring particular arrangements due to their on-going involvement in the overall program.
- There is considerable expertise in the specialized transit industry and among consultants who have undertaken similar recent studies of specialized transit services with different service delivery models. An in-house study would not make the full advantage of this broader experience in the industry.

Recognizing the foregoing points, an in-house study is not recommended. This is primarily due to the lack of staff resources to conduct the study.

**Full Scope Operational Review:**

A second approach would be a “turn-key” consulting assignment to carry out a full scope operational review. This approach usually involves a request for proposals (RFP), the evaluation of competing proposals and the selection of the most suitable consulting team for the study. For larger assignments with several potential consulting service suppliers, this approach has served the City well. However, for this study, there are some potential disadvantages of this alternative, as follows:

- There are only a limited number of consulting firms with recent experience in large scale specialized transit services in Ontario.
- The consulting team is required to spend considerable time and effort (and therefore considerable cost) in developing a sound working knowledge of the services under review.
- The City has less flexibility in bringing in selected outside resources such as other specialized transit managers for a peer review of the service delivery.
- To ensure that the consulting assignment responds specifically to the local issues it is necessary to have a clear, comprehensive terms of reference, to manage the study process closely and to negotiate any changes in scope that might occur after the award of an assignment. These requirements put additional demands on staff time and usually lead to increased costs of the final study product.

Recognizing the scope and complexity of this assignment, it is estimated that a full scope operational review is estimated to cost the City in the order of $100,000. Based on the expected high cost and the other limitations noted above, this alternative is not recommended.
Peer Review Team under the direction of a Steering Committee:

This approach will consist of selecting a qualified consultant from the Public Works roster. A Steering Committee comprised of interested members of Council, Staff and the Consultant will lead the study. It will also include the use of a peer review team of several managers of large specialized transit services to review the performance of the ATS Program and the findings of the study consultant. A peer review is felt to be a particularly useful exercise for this service since there is such a wide range of service delivery models in the specialized transit industry.

The overall study will be managed by a study team chaired by the Director of Transit. A primary activity within the overall review will be to interview key stakeholder representatives including: DARTS Board of Directors, Veterans Transportation, Council’s ACPD, the Seniors Advisory Committee, the Executive of CUPE and the Executive of ATU. The study process will generally follow the flow chart for service delivery review outlined earlier. The cost of consultant resources for this approach is estimated to be less than $50,000.

The implications of this alternative are as follows:

- The experience and expertise of City staff resources can be utilized to maximum advantage without having a major impact on other activities.
- The review will move forward more expeditiously and staff will be able to best utilize known consulting resources most effectively. It also offers similar flexibility in finding suitable persons for the suggested peer review.
- The utilization of a selected consultant and external peer reviewers offers the broadest assessment of the issues involved with this service review.
- The costs to the City are much less than with a full scope consulting assignment.

FINANCIAL/STAFFING/LEGAL IMPLICATIONS:

The recommended approach to carrying out the service delivery review will have an estimated cost not to exceed $50,000. This can be funded from the Transit Working Fund Reserve.

Any form of operational review at this time will tax available staff beyond their capacity for the term of the review. The scope of the review will include an assessment of staffing requirements for recommended service delivery strategy. Recommendations on future staffing will be forthcoming through the review.

There is an existing agreement between the City and DARTS regarding the services operated by DARTS for a 5-year term which expires in June 2008. D.A.R.T.S. has an existing agreement with Veterans Transportation which concurrently expires in June 2008. The terms and conditions of this agreement will be reviewed and recommendations may be forthcoming on possible changes in the contractual relationships between the City and the other parties involved in the delivery of this service. These recommendations will need to respect the provisions of existing agreements.

Other external initiatives may have some implications on the operational review of specialized transit services. The Ontario Human Rights Commission (OHRC) has very recently released a position paper that questions whether specialized transit services...
are a special program. This may impose certain limitations on the future delivery of the service. Staff is currently reviewing this matter and will be reporting to Council on this matter in future.

**POLICIES AFFECTING PROPOSAL:**

The City’s Official plan contains policies stipulating that the public transit system should be affordable, efficient, convenient and accessible, stressing easy access to activity areas.

It is critical that the service delivery review not result in further delay to the two key program enhancements staff has underway:

- Council’s consideration of the eligibility and registration policy changes and implementation strategy yet to be considered by Council.

**CONSULTATION WITH RELEVANT DEPARTMENTS/AGENCIES:**

The City Manager and Corporate Management Team have outlined a strategy of conducting operational reviews of all major programs over the next few years to ensure the most efficient and effective delivery of services to the citizens of Hamilton. As one of the first operational reviews this study will provide valuable experience that will benefit the operational reviews of other programs in future.

Staff has consulted with the recently created Corporate Efficiency & Effectiveness Strategy Team.

**CITY STRATEGIC COMMITMENT:**

**Official Plan 4.3.2.10 (December 2000)**

Develop and implement a long term comprehensive plan for improvement to special and regular transit services, to address the needs of the elderly and people with disabilities.

**Vision 2020**

Changing our Mode of Transportation

Strategy 100. Provide transportation services for people with disabilities that are equivalent to regular public transit and which provide for emergency needs and improve DARTS service so there are less time based restrictions.

**Vision 2020**

Personal Health and Well-Being

To develop the social and physical environments to create a barrier-free community that allows all citizens to participate fully in community life.

**Vision 2020**

Community Well-Being and Capacity Building

To ensure public activities and decisions at all levels of government are coordinated, efficient, effective and easily accessible to all citizens.

To develop our economic, social and physical environments so as to enable the participation of all citizens and communities in local and regional community life.
Transportation Master Plan
1.3 The Overall Vision

- Support transportation systems that guarantee access to all activities for all city residents
- Generate long term cost savings by requiring only strategic infrastructure development for efficient transportation
- Develop full accessibility to public transit services for people with mobility limitations
Appendix “A”

Accessible Transit Services (ATS) Operational Review

Terms of Reference

Purpose
To identify opportunities for improvements in efficiency & effectiveness within the Accessible Transit Services (ATS) program.
To explore options for providing accessible transportation to people with disabilities through new partnerships with private sector transportation companies.

Scope
Steering Committee comprised of interested members of Council, Staff and a Consultant.
Peer review of the ATS program by a team of senior specialized transit managers from other large communities in Ontario.
Stakeholder consultation with: DARTS Board of Directors, VETS taxi owner, Council’s ACPD, the Seniors Advisory Committee, the Executive of CUPE and the Executive of ATU.
An update on Study conducted in 2003 on the Cost & Quality implications of the ATS program being provided: fully “in-house”; through the current hybrid model; and through a private for-profit service provider.
Definition of core and non-core processes.
Assessment of software application performance.
Review and assessment of Governance models in Canada.
Review and assessment of Organization designs in Canada.
Analysis of 2004 Customer Contacts (stakeholder expectations).
Implications of 2005 Budget enhancements approvals (timing of implementation, future implications on costs and expectations, etc.).
Environmental Scan – Customer needs assessment (Stakeholder surveys).
Chart of Benchmarking results.
Implications of available policies/agreements/legislation/regulations.
Identification of cost reduction opportunities.
Identification of opportunities for productivity improvements.
Assessment of staffing requirements.
Recommend training requirements.
Timing

Inputs
1. 2003 Approved ATS Budget (expenditures and fare revenue)
2. 2003 Approved Service Levels, all ATS programs, (trips and hours of service)
3. 2003 ATS program actual year-end performance ((financial and operational performance relative to approved budget and industry accepted performance measures ($/trip, $/capita, trips/capita, registrants/capita, trips/registrant, etc.))
4. Current program structure (ATS – DARTS – Vets relationship and reporting structure)
5. Current staffing and reporting relationship for all ATS positions (including Contractor and Sub-Contractor)
6. Current infrastructure, all programs, (ATS/DARTS/Vets), (fleet, facilities, equipment, technology)
7. Inventory of Technology (current and planned, PASS, IVR, AVLC, MDT, Radio, etc.)
8. Inventory of Canadian Governance models for similar sized municipalities – Private-for-profit, Private not-for Profit, In-House, Hybrid
9. Inventory of Canadian Organizational Designs for similar sized municipalities – (Hybrid, Brokerages, etc.)
10. Statement of Ontario Human Rights Complaint settlement requirements
11. Summary of 2004 Client Contacts
12. Statement of implications of 2005 Budgeted Service Enhancements; implementation of OHRC settlement and changes to Registration & Eligibility policy
13. Stakeholder expectations: Council members; ACPD; Clients - (common locations); (Agency programs); Contractor – DARTS Board of Directors, Sub-Contractor – Vets Taxi; Union – CUPE; Union – ATU; Seniors Advisory Committee;
14. Chart Client demographics: individual trips; agency trips; program trips
15. Chart – industry accepted key performance standards
16. Review of current available research on relevant North American Best Practices
17. Inventory of: Policies (registration & eligibility, fare, area rating, operational policies, etc.); Agreements (DARTS Collective Agreement); Legislation impacting financial and operational performance (ODA, Ontario Labour Relations Board); Contracts (Contractor Contract)
18. Inventory of relevant Reports/Operations Updates/Project Updates to Council
SUBJECT: Accessible Transit Services (ATS) - Consideration of an Operational Review (PW05075) - (City Wide) - Page 15 of 22

Appendix “B”

CITY OF HAMILTON

ADVISORY COMMITTEE FOR PERSONS WITH DISABILITIES

<table>
<thead>
<tr>
<th>Report to:</th>
<th>Submitted by:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair and Members</td>
<td>Tim Nolan, Chair, Advisory Committee for Persons with Disabilities</td>
</tr>
<tr>
<td>Committee of the Whole</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date:</th>
<th>Prepared by:</th>
</tr>
</thead>
<tbody>
<tr>
<td>June 9, 2004</td>
<td>Jane Lee x2654</td>
</tr>
<tr>
<td></td>
<td>Stella Glover x3993</td>
</tr>
</tbody>
</table>

SUBJECT: Review of Specialized Transit Policies, Practices and Procedures Impacting Upon the Quality of Services for Persons with Disabilities (CL04010) (City Wide)

RECOMMENDATION:

a) That the following amendments to the Specialized Transit Policies, Practices and Procedures, attached hereto as Appendix “A” to this report, which have a direct impact on the quality of transit services for persons with disabilities, be considered:

(i) Hours of Service
That an extension of the hours during which service is available be considered, with pick-ups as late as 12:30 a.m. on Friday and Saturday evenings, for a trial period of no less than six (6) months;

(ii) Service Area
That continued service to persons outside of the Urban Transit Area (UTA) be confirmed; and that, prior to any contemplation of change to such service area, full consultation with the Advisory Committee for Persons with Disabilities and members of the community of persons with disabilities be undertaken;

(iii) Door-to-Door, Shared Ride Service
That the current policy and practice be confirmed as appropriate to the needs of persons with disabilities registered for service;
(iv) **Service Reservation Types**  
That the current policy and practice be confirmed as appropriate; and provided that all instances of “Call Return” service, where the requested pickup is not achieved within a one hour time frame, be documented and investigated to ensure that a high quality of service is maintained;

(v) **Trip Times**  
That the current policy and practice be confirmed as appropriate;

(vi) **Passenger Contact at Trip Origin**  
That the current policy and practice be confirmed as appropriate; and provided that the practice is rigorously applied as outlined;

(vii) **Pick-up Window**  
That the current policy and practice be confirmed as appropriate;

(viii) **Drop-off Window**  
That the current policy and practice be confirmed as appropriate;

(ix) **Call Returns**  
That the current policy and practice be confirmed as appropriate; and provided that information concerning requested call return trips is communicated by dispatch staff to passengers; and that appropriate measures are taken to log such requests; and that proper reporting is carried out;

(x) **Trip Cancellations**  
That policy reform be undertaken such that cancellations are made as soon as possible and must occur by 12:00 p.m. of the day prior to the requested trip, with a goal of allowing more casual trip bookings to be taken as a result of openings arising from cancellations; and that late cancellations only be accepted for legitimate reasons; and that a clearly defined and advertised system of investigation, progressive warnings and/or service suspensions be employed where a pattern of abuse is discernible, including a procedure for appeals;

(xi) **No-Shows**  
That policy reform be undertaken such that legitimate reasons for no-shows be considered; and that a clearly defined and advertised system of investigation, progressive warnings and/or service suspensions be employed where a pattern of abuse is discernible, including a procedure for appeals;

(xii) **Passenger Service Suspensions**  
That policy reform be undertaken such that service suspensions recognize the need to ensure the safety and security of the passengers, the driver, and the vehicle, and that a clearly defined and advertised system of investigation, evaluating passenger incidents and determining an appropriate response be employed, including a procedure for appeals;
(xiii) **Attendants and Companions**
That policy reform be undertaken such that an attendant to a passenger ride at no fare cost, service to such passenger being “curb-to-curb”; and that the requirement of an individual passenger for more than one attendant be given consideration on a case by case basis; and that companions may travel with passengers, subject to vehicle space availability, at regular fare cost;

(xiv) **Service Cancellation**
That policy reform be undertaken such that a defined progressive system of partial to full cancellation of the service, including evaluation by areas within the City, be considered; and that a priority system for dialysis passengers be developed to ensure the unique, acute needs of this passenger group are considered; and,

b) That staff be directed to maintain ongoing involvement of the Advisory Committee in the development and implementation of these and other policies which affect the quality and sufficiency of services for persons with disabilities.

---

Tim Nolan, Chairperson,
Advisory Committee for Persons with Disabilities

**EXECUTIVE SUMMARY:**

The Transportation Sub-committee of the Advisory Committee for Persons with Disabilities has spent considerable time reviewing and making recommendations on the DARTS Service Policies and Standards. On June 1, 2004, they presented their recommendations to the Advisory Committee for Persons with Disabilities for a further discussion and review. The recommendations approved by the Advisory Committee propose changes to the specialized transit policies, practices and procedures in order to improve the quality of transit services available for persons with disabilities.

**BACKGROUND:**

At its meeting of June 1, 2004, the Advisory Committee for Persons with Disabilities received a report from its Transportation Sub-Committee and made the foregoing recommendations.

The Transportation Sub-Committee of the Advisory Committee for Persons with Disabilities has met monthly for the past twelve months with Transit staff to review specialized transit policies, practices and procedures which have a direct impact on the quality of transit services for persons with disabilities. This review has formed an integral part in the Transit Division’s implementation of the 2003 Accessibility Plan to respond to the requirements of the Ontarians with Disabilities Act. The specific policies
reviewed were the Schedule B - Service Policies and Standards taken from the terms of agreement between the City and DARTS. These policies and standards cover major aspects of when, where, and how services will be delivered. A copy of these policies is attached hereto as Appendix “A”.

The Advisory Committee for Persons with Disabilities is requesting that these recommendations for changes to the Service Policies and Standards be approved by Council, and that staff be directed to maintain ongoing involvement of the Advisory Committee in the development and implementation of these and other policies which affect the quality and sufficiency of services for persons with disabilities; and would be pleased to provide further commentary and recommendation at the request of Council.

**ANALYSIS OF ALTERNATIVES:**

**FINANCIAL/STAFFING/LEGAL IMPLICATIONS:**

**POLICIES AFFECTING PROPOSAL:**

The 2003 Accessibility Plan for the City of Hamilton included an initiative to undertake a review of the DARTS policies. The completion of this review has resulted in the recommendations for change contained in this report.

**CONSULTATION WITH RELEVANT DEPARTMENTS/AGENCIES:**

The Transportation Sub-committee of the Advisory Committee for Persons with Disabilities includes representation from the Seniors Advisory Committee. Staff of the Accessible Transportation Services unit of the Transit Division of the Public Works Department assisted the sub-committee with their review of the documents.

**CITY STRATEGIC COMMITMENT:**

This report addresses several aspects of the City’s Mission, Vision, Values and Goals. It shows respect for the needs of residents of our community with disabilities and proposes with its recommendations to increase opportunities for those members of the community, with respect, compassion, and a desire to seek excellence in service delivery, and to address the needs of the community.
SCHEDULE “B”
SERVICE POLICIES AND STANDARDS

In the delivery of specialized transportation services, the City and the Contractor shall achieve and maintain the service policies and standards listed in this section, throughout the term of the Contract.

B1. **HOURS OF SERVICE**

The specialized transportation services shall be operated to provide passenger pick-ups during the following hours, subject to changes specified by the City during the term of the Contract:

- **Weekdays:** 7:00 A.M. to 11:00 P.M.
- ** Saturdays:** 8:00 A.M. to 11:00 P.M.
- **Sundays:** 8:00 A.M. to 11:00 P.M.
- **Statutory Holidays:** 9:30 A.M. to 11:00 P.M.

Due to the inexact nature of many passenger trip requests, the Contractor shall recognize that adherence to above noted hours may require discretion to be applied by the Contractor, such as in the case of dialysis passengers whose treatment schedule may require delay of their scheduled 11:00 p.m. pick-up by a few minutes.

B2. **SERVICE AREA**

The service shall provide for passenger trips with origins and destinations within the boundaries of the City of Hamilton, or to or from such cross-boundary transfer point(s) as might be designated for use and approved by the City from time to time.

B3. **DOOR-TO-DOOR, SHARED RIDE SERVICE**

The Contractor shall design and operate the service to accommodate the required passenger trips in a safe and predictable manner, providing transport of passengers as safely, conveniently and lawfully close as possible to or from an accessible building entrance door. Operational schedules shall be designed so as to maintain the privacy of individual passengers. Drivers will be required to assist passengers in and out of vehicles and to assist passengers between the vehicle and the exterior set of accessible doors at the place of trip origin and destination. At other than private residences, the driver will also assist passengers to and from a lobby or designated waiting area that is reasonably close to the outer accessible entrance door. Drivers will also ensure the delivery of specified passengers with a cognitive or mental disability or dementia to a responsible caregiver when so specified by the City, giving primacy to the security of these passengers above all other requirements. Drivers will be required to safely secure all wheelchairs, scooters and other mobility aids in the vehicles. In the case of wheelchair passengers, the driver will not be expected to move a chair up or down more than one step. At homes equipped with ramps, snow and ice or other obstacles must be removed prior to passenger pick-up. The Contractor shall have clear procedures and policies which delineate the handling of passengers using wheelchairs and other mobility devices.

In no situation will the Contractor be expected to provide service where the pick-up or drop-off of a passenger cannot be done in a safe and predictable manner. In circumstances where service is denied due to unsafe conditions, and resolution with the passenger cannot be negotiated, the Contractor will report this to the City.
B4. **SERVICE RESERVATION TYPES**

The service will be designed to provide four types of service reservation for passengers:

i) **Subscription Service:**

Required by many passengers who are picked up at the same location and time and taken to the same destination each weekday morning, and picked up and returned home at the same time each afternoon.

ii) **Booked Trip Service:**

Required by passengers on a non-recurring or infrequent basis. This service has traditionally been offered in periods outside of the weekday peak periods when most subscription trips occur, or during peak periods as schedule time is available.

iii) **Call Return Service:**

Required by passengers for medical trips, where the duration of the appointment may not be readily known to the passenger at the time of trip reservation. The passenger calls dispatch when the return trip is required, and the Contractor responds as soon as possible within a one hour time frame.

iv) **Special Service:**

Required on an infrequent basis by community agencies or passenger groups to move groups of passengers at one time. These requests for service must be done well in advance and can be provided only if they do not interrupt regular service. The City will refer all requests for special service to the Contractor; the Contractor will evaluate its ability to provide the service requested based on vehicle and driver availability, and will contract directly with the requesting party.

B5. **TRIP TIMES**

The service delivered by the Contractor involves shared rides, where the passenger might reasonably expect to be on a vehicle for up to sixty (60) minutes, depending on trip length, time of day and many other factors. Passenger trips shall be scheduled such that a passenger is not on a vehicle for more than the greater of seventy-five (75) minutes or two times the direct driving time, under normal conditions. In any instance where a passenger is on a vehicle for more than ninety (90) minutes, for any reason, the driver shall submit a report, noting the reason, and a summary report of incidents shall be provided to the City at the end of each month.

B6. **PASSENGER CONTACT AT TRIP ORIGIN**

Efficient service is dependent on vehicle arrival within the pick-up window noted in subsection B7 below, but arrival exactly on the reserved pick-up time is not always possible due to weather or passenger delays. When a vehicle arrives at a trip pick-up address, the driver shall go to the door and provide notice of the vehicle arrival. If the passenger is not at the door or does not respond to notice of vehicle arrival, the driver shall contact the dispatcher, who will telephone the residence. The driver will wait five (5) minutes past the actual arrival time, regardless of the scheduled time, provided that arrival was within the pick-up window noted in subsection B7 below. At that point the driver shall confirm a “no-show” with the dispatcher and note the incident on their schedule, prior to proceeding.
B7. **PICK-UP WINDOW**

The Contractor shall operate the vehicles to the schedules set by the City, such that the vehicle arrives at each trip origin address not more than fifteen (15) minutes before the scheduled pick-up time and not more than fifteen (15) minutes after the scheduled pick-up time, or such other predefined window as may be mutually agreed by the Contractor and the City from time to time. The Contractor will further recognize the requirement of some passenger trips to be operated as “time-certain”, as pick-up at school, work and many programs cannot be done other than at the specified time. In each case, where the driver arrives outside this pick-up window, it shall be reported by the driver, along with the reason. The Contractor shall summarize the number of arrivals outside the pick-up window on a daily basis and submit a monthly report to the City.

B8. **DROP-OFF WINDOW**

The Contractor shall operate the vehicles to the schedules set by the City, such that the vehicle arrives at each trip destination address not more than fifteen (15) minutes before the scheduled arrival time and not more than fifteen (15) minutes past the scheduled arrival time. The Contractor will further recognize the requirement of some passenger trips to be operated as “time-certain”, as arrival on time at school, work and some other appointments must be a priority. In each case where the driver arrives outside this drop-off window, it shall be reported by the driver along with the reason. The Contractor shall summarize the number of arrivals outside the drop-off window on a daily basis and submit a monthly report to the City.

B9. **CALL RETURNS**

Call returns are currently used to deal exclusively with medical trips where the duration of the appointment may not be readily known to the passenger at the time of trip reservation. The Contractor shall accommodate all requests for call returns which have been arranged by previous reservation, dispatching a vehicle to arrive at the pick-up location upon request. Call returns shall be accommodated such that a passenger is picked up within forty-five (45) minutes under normal conditions. In any instance where a call return has not been provided within sixty (60) minutes, for any reason, the Contractor shall submit a report to the City, noting the reason. A summary report of call returns shall be provided to the City at the end of each month.

B10. **TRIP CANCELLATIONS**

The Contractor shall maintain a clearly advertised policy with regard to client cancellation of a trip, or shall employ such policy as the City and the Contractor shall agree upon from time to time.

B11. **NO-SHOWS**

No-shows have a detrimental effect on the efficiency of service, and detract from the availability of rides available to passengers. A “no-show” occurs when a passenger books a trip, does not cancel ahead of time, and is not available at the time the vehicle arrives within the pick-up window. In all incidents, the Contractor shall take reasonable steps to contact the passenger prior to recording a no-show, as outlined in subsection B6 above. Drivers shall record no-shows on their daily trip report. The City and the Contractor shall agree upon the no-show policy to be enforced by the Contractor, and Contractor shall be responsible for the administration of such policy.
In circumstances where a passenger continues to abuse their registrant privilege by failing to cancel trips, the Contractor may request that the City suspend the passenger’s service, subject to an agreement with the passenger on resolution. The Contractor shall summarize no-shows as part of the Monthly Performance Report to the City. In each instance of a request for service suspension for no-shows, the Contractor shall provide a report to the City documenting the issues.

B12. PASSENGER SERVICE SUSPENSIONS

In the event a passenger repeatedly behaves in a manner that disrupts service, or threatens the safety and security of other passengers or Contractor staff, the Contractor shall have the discretion to suspend or terminate that passenger’s privilege of using the service. Prior to service being suspended or terminated, a written notice shall be provided to the passenger and to the City.

B13. ATTENDANTS AND COMPANIONS

Passengers requiring the assistance of an attendant or companion shall be allowed to have such attendant or companion travel with them on the Contractor’s vehicles, provided that a regular fare is paid by the attendant or companion; and in the case of a companion, that space is available on the assigned vehicle. Passengers travelling with an attendant or companion shall advise the Contractor’s staff of this at the time the trip is booked. The Contractor shall report each trip by an attendant or companion as a paid fare.

B14. SERVICE CANCELLATION

The Contractor may cancel the service due to weather or other extraordinary conditions which would pose a clear risk to passengers’ safety and which clearly prevents the operation of the service in a safe and predictable manner. In the event that the Contractor does cancel the service, information regarding this cancellation shall be provided to all radio stations based in the Hamilton area within one hour of such cancellation. The information shall be provided both by telephone and by e-mail or fax, with a record maintained of the transmissions. The City shall also be notified of such cancellation within one hour.

B15. COMPLAINTS AND COMMENDATIONS

The City shall receive all complaints and commendations from passengers, and document and register these. Complaints and commendations regarding the Contractor shall be forwarded by the City within 72 hours of receipt. The Contractor shall investigate each complaint and provide a formal response to the City within five (5) working days, detailing the investigation and subsequent action that the Contractor proposes to take to correct or otherwise deal with the complaint. Upon receipt of the Contractor’s formal response, and discussion and agreement between the City and the Contractor, the City shall provide a response to the passenger(s). The City shall produce a Monthly Summary of Service Reports.