LET'S PLAN ON IT!

A Guide to Providing Transportation Services in Rural Areas

For

Seniors and Persons with Disabilities

Alberta Government

May 2013

Foreword

LET'S PLAN ON IT! is intended to help municipalities, service organizations, consumer groups and other interested parties develop a local public transportation system for use by seniors and persons with disabilities.

Alberta Transportation has prepared this guide based on concepts already used in Alberta and elsewhere. The hope is that local stakeholders will use the contents to ensure good local transportation, through the pooling of resources and coordination of service wherever it makes sense.

This document will be updated as additional information becomes available. If you are aware of any additional sources of information, or any errors in this document, please forward them to:

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Chapter 1
Introduction

Accessible transportation is a major challenge facing seniors and persons with disabilities, especially those residing in rural areas. With the number of seniors and persons with disabilities growing each year, the need for accessible transportation options is even greater. According to the Premier's Council on the Status of Persons with Disability, about 1 in 6 Albertans (approximately 500,000) have a disability. Current statistics from Alberta Seniors show that there are approximately 447,000 seniors in Alberta. This number is projected to increase to more than 920,000 by 2031. This means about one in five Albertans will be a senior by that time.

1.1 Objective and Context

This guide is a collection of practical information and suggestions designed to assist smaller communities in planning, developing and implementing an accessible transportation system for seniors and persons with disabilities.

Rural communities have a particularly difficult time providing local transportation, due to the high costs and large geographic area involved. Rural transportation systems are usually established to provide rides to and from work, various social services, entertainment and medical appointments. Generally speaking, communities may have a variety of mini-transportation systems within their own area, each having one or two vans, cars and sometimes buses to transport their clients. With such systems, there is the potential for labour, fuel and vehicles to

be wasted, for the system to be operated under capacity, and for service to be fragmented.

Today, the benefits have become apparent of pooling these existing and valuable assets into a broader-based transportation system where service providers and consumers can make the best use of their system.

Successful accessible transportation systems must be initiated and supported locally, and there must be effective communication between service providers, consumers, municipal administrators and elected officials. Keeping the general public informed of the new or revamped system will also help maintain the vital local support needed to succeed.

1.2 Structure

This guide includes information on how to:

- Structure a new system;
- Evaluate existing systems to enable both service providers and users to get the most out of existing vehicles and limited funding available; and
- Obtain information on how to coordinate services and implement the "Family of Accessible Services" (see Appendix C: Glossary of Transportation Terms) approach in providing transportation services.

The guide is organized as follows:

Chapter 1 Provides an introduction;

Chapter 2 Describes seven basic steps which can be followed in planning a transportation system in your community;

Chapter 3 Lists factors to be considered in analyzing demand for service, reviewing options for coordination, and applying the Family of Accessible Services approach;

Chapter 4 Describes nine steps involved in making basic service decisions, including system structure, role of the private sector, implementation and monitoring;

Chapter 5 Lists important guidelines regarding personnel, volunteers, vehicles and performance measurement;

Chapter 6 Deals with administrative needs, such as budgeting, record keeping and insurance; and

Chapter 7 Provides advice on other considerations, such as avoiding common pitfalls.

Appendix A: How to Obtain Information

Appendix B: Bibliography

Appendix C: Glossary of Terms used in this document

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Chapter 2
Planning For Your Community's Accessible Transportation Needs

A successful rural transportation starts at the local level. It begins because an individual or small group thinks that there must be a better way to provide transportation services in their community.

This chapter describes seven basic steps adapted from the *Toolkit for Rural Community Coordinated Transportation Services* (published by the U.S Transit Cooperative Research Program) that can be followed in planning the coordination of a transportation system in your community. If a system already exists, you may want to use these steps to review and rationalize the service you are providing.

2.1 Step 1: Form a Task Force

The first step in the planning process for your community accessible transportation needs is to form a Task Force and decide to move forward.

The drive to have an accessible transportation system in your community may be locally generated. Having an organizational structure is crucial for early progress and eventual success. A Task Force or Steering Committee is necessary from the onset to ensure the planning process goes on. This group, preferably a small and manageable size, will facilitate overseeing the planning process.

The Task Force/Steering Committee should be made up of representatives from the following groups:

- Agency and consumer representatives;
- Community transportation service providers, such as handi-bus associations/ operators, long-term care facilities, taxi operators, etc.
- Concerned community members who are able to evaluate options and contribute to decision-making;
- Local government officials, including elected officials; and
- Intercity bus service providers.

The group must make a decision on who to involve in the planning and then set agendas and timetables. Leadership is equally important. Roles and responsibilities must be clarified. One way to do this is to develop a memorandum of understanding that provides a common statement by which all interested parties state their commitment and interest.

During the initial meeting, the Task Force should take care of housekeeping items that will make its job easier in the long term, including:

- Appointing a chairman, secretary, and (if required) treasurer;
- Clearly identifying the role of each party;
- Deciding how often the Task Force should meet and the level of record keeping needed;
- Defining the geographic area to be included in the review;
- Estimating the need for specialized transportation services;
- Developing a project work plan (including the identification of tasks and timelines); and

- Appointing a Task Force member or volunteer to undertake each task.

The members of your Task Force should be able to roughly estimate the number of seniors and persons with disabilities in the area, based on their experience and roles in the community. Task Force members should also be able to decide whether basic transportation needs are currently being met. (For example, are persons able to get to medical appointments?)

The success of your transportation system will require the full commitment of each member of the Task Force. Members will need to allow time to prepare for and attend meetings, and possibly workshops to discuss issues with various groups.

2.2 Step 2: Conduct Needs Assessment

Through carrying out a needs assessment, you will be able to determine whether the potential need and support for accessible transportation exists in your community. Coordinating accessible transportation system requires an understanding of community resources and travel needs. It is important to establish a common base of information and knowledge about transportation in the community before moving forward with a plan of action. By talking to various community groups and agencies, municipal officials, seniors' centres, nursing homes, and most importantly potential users, you will be able to decide whether to pursue the matter and move to the next step.

To this end, the following activities are recommended for gathering and sharing information:

- Personal interviews (accessible transportation service providers, users and other stakeholders);

- Telephone, mail, or Internet surveys;
- Regular Task Force meetings;
- Facilitated workshops; and
- Report to key participants and the community.

The collection of information on the transportation needs of your community is key to enabling the Task Force to make informed decisions. The following information should be collected:

- Prior reports on the subject;
- Demographic data (i.e., information on the increased number of persons with disabilities and the aging population);
- Applicable municipal bylaws (such as a taxi bylaw);
- Information on all service providers in the area, such as handi-bus organizations, taxi companies, nursing homes, and intercity bus carriers (can usually be obtained from the local municipal office); and
- Federal, provincial and municipal acts, regulations, and policies regarding the transportation of seniors and persons with disabilities (can be obtained from the governments concerned; see Appendix A for ordering information).

Each of these activities contributes to the understanding of transportation issues, problems, needs, and resources in the community. Each also offers opportunities for an increasingly broader group of interested parties to join the discussion.

2.3 Step 3: Establish Focus, Consensus, and Direction

To be effective, the Task Force must have clear goals and objectives. The development of clear goals and objectives will assist your Task Force in planning efforts and enable the measurement of results.

Following the needs assessment activities in Step 2, the Task Force must agree on the problem, develop a consensus, and set a direction. The following activities are necessary to establish focus, consensus, and direction:

- Conduct brainstorming sessions to:
  - – Discuss and refine the problem, needs, and issues
  - – Agree on the problem, needs, and issues
- Hold a series of workshops to:
  - – Solidify consensus on problems, needs, issues, and the need to move forward
  - – Set direction for putting the remaining steps in place

2.4 Step 4: Design Alternative Courses of Action

In Step 4, the goal is to strategically develop accessible transportation options by evaluating alternative approaches. By this time, the Task Force and the broader group of participants involved should have a clear idea of problems, needs, potential solutions, and priorities. This is the place where alternative approaches are presented. The advantages and disadvantages of different approaches to addressing needs and solving problems can be considered and evaluated before a decision on a specific approach is made.

Alternative courses of action need to be addressed in the following areas:

- Interagency relationships, roles, and responsibilities;
- Organizational structure, management, and staffing;
- Service development, delivery, and pricing options;
- Maintenance, storage, fueling, and sharing of vehicles;
- Financial resources—operating and capital—and associated budgets; and
- Human resources—staffing and training.

For each alternative course of action, the following should be prepared:

- A description of the course of action, the tasks, and activities that coordination could or should involve;
- An indication of who is responsible for taking and completing action;
- The identity of the roles and responsibilities of all participants in the action;
- A list and discussion of the potential benefits and possible problems that may need to be overcome;
- Information on the level of activity required and the estimated costs and the likely sources of revenues (agency and program sources);
- A determination of the potential sources of funding to cover expected costs; and
- A description of how the course of action fulfills the mission, vision, goals, and objectives.

Accessible transportation services can be organized in a variety of ways, depending on the strategic direction, vision, mission, goals and objectives that have been established. The specific strategy depends on the level of

transportation needs, the size and character of the market that will be served, special needs that may exist among customers to be served, the number and size of the agencies that commit to work together, and the local government.

2.5 Step 5: Assess Alternative Options

The goal of this step is to assess the alternative options and select the best option to implement. In assessing options, it is important to focus on the benefits that will be attained from implementing a coordinated accessible transportation system. The benefits should be expressed in goals and objectives that are already established. Assessment activities should include the following:

- Assess options against goals and objectives;
- Look at strengths and weaknesses of those options;
- Assess options for organizational and operational reasonableness; and
- Get started!

2.6 Step 6: Develop and Implement the Preferred Choice

During this stage, the Task Force is now ready to formulate action plans and implement them to achieve a coordinated accessible transportation service.

The following is a checklist of important activities:

✓ Outline your broad strategy
✓ Review and update memoranda of understanding

- ✓ Prepare action plans in key areas
- ✓ Establish a timetable with key milestones
- ✓ Communicate your strategy and plan
- ✓ Address organization, management, service delivery, and budgets

These are the core areas of implementation. Be sure to prepare a timeline for implementation and set milestones for completion of activities and events. For change to occur and to be achieved successfully, the assessment of options must result in a local organization taking responsibility for leadership and organizing the discussion and debate that should result in improved local transportation services. Such a body is critical for the successful development of plans and actions to implement those plans.

2.7 Step 7: Evaluate and Improve the System(s) Implemented

The goal at this stage is to review and evaluate the progress of the accessible transportation system that has been implemented. Don't wait too long to review and evaluate your accessible transportation services. To help you in the process, it is important to decide what is important to review, gather your information and review it carefully. Take corrective actions where required based on results from the review and communicate results and progress. Tell your story on a regular basis, monthly, quarterly, and annually in a variety of ways.

Chapter 3
Analyzing Existing Transportation Services

Having a coordinated accessible transportation system requires an understanding of community resources and existing transportation services. It is important to establish a common base of information and knowledge about transportation in the community to be able to provide the needed services.

This chapter deals with analyzing demand for service, reviewing options for coordination, and applying the Family of Accessible Services approach.

3.1 Inventory of Transportation Resources

Looking at the inventory of transportation resources in the community is a good way to begin your analysis of existing transportation services. Once the geographic area to be reviewed has been determined, information should be obtained from all service providers within that area. These service providers will differ in size, level of service, clientele, etc., and may include:

Public Non-Profit

- Local transportation systems;
- City or county systems with or without lift-equipped vehicles;
- Health organizations;
- Social service agencies;
- Community action agencies;

- School boards;
- Housing authorities;
- Long-term care facilities; and
- Hospitals.

Private Non-Profit

- Hospitals and nursing homes;
- Social service organizations;
- Community organizations;
- Associations for persons with disabilities;
- Seniors centres and action groups; and religious organizations.

Private for-Profit

- Taxi companies;
- Intercity bus carriers; and
- Non-emergency medical transportation companies.

You will then need to collect information on service, administration, vehicles, drivers, costs, ridership and trips, as follows:

Information on Service Characteristics

Details on how each service provider operates its system are required:

- Type of service (i.e., door-to-door);
- How users access the system (e.g., demand-responsive system, fixed route);

- Regular assistance provided on vehicles (e.g., assisting clients with coats, packages);
- Routes;
- Hours of operation;
- Eligibility;
- Attendant policy; and
- Fares.

Information on Administrative Characteristics

- Personnel (hours; how many; roles; volunteer; paid);
- Administrative procedures; and
- Sources of funding and revenue.

Information on Vehicles

Types of vehicles and usage will differ with each service provider, depending on its particular circumstances. The following data should be gathered:

- Number of vehicles and whether they are owned or leased;
- Seating capacity of each vehicle;
- Age and condition of each vehicle;
- Whether vehicles are radio dispatched;
- Whether there is any special equipment; and
- Whether vehicles are used full time or if there is idle time.

Information on Drivers

- Number of paid drivers;
- Whether drivers are full-time or part-time, and whether they were hired for the purpose of driving seniors and persons with disabilities (many health-care facilities use their own employees to drive patients to appointments, etc.);
- Hours per week, per driver,
- Use of volunteer drivers; and
- Training provided.

Information on Costs

If the service is being provided as part of the care of seniors and persons with disabilities (as with a nursing home), it is unlikely that information on the "real" costs of transportation is available. In such cases, it is best to estimate costs, as it is difficult to determine whether coordination and regionalization of services would be more cost-effective than stand-alone systems if cost information is not available. You will therefore need:

- Staff costs;
- Operational expenses, such as fuel costs and vehicle maintenance;
- Administrative costs, such as telephone charges, space, storage and rental; and
- Information on what is being provided at no cost (e.g., free storage cost for vehicles).

Information on Ridership and Trip Characteristics

Information on ridership and trip characteristics is particularly important when determining whether there is "unmet" need in the community. Some service

providers, especially those serving only their specific client group, may not have data on trip times, volumes, etc. To get a clear picture, it is best to obtain an estimate or "best guess" for the following key aspects:

- Types and total number of clients;
- Eligibility criteria;
- Average trip duration;
- Where majority of trips taken (e.g., for medical appointments);
- Average number of riders (per day, week or month);
- Extent of "hands-on" assistance provided (i.e. assistance with seat belts, tie downs, loading and unloading);
- Number of requests for service that cannot be accommodated; and
- Degree of coordination between service providers (including between local services and intercity buses).

3.2 Analyzing Demand for Service

The type of inventory described in the previous chapter provides an excellent idea of current needs in the community, and more importantly, of current service levels and "unmet" need. A simple method of determining whether the existing transportation system is effective and efficient is to ask:

- Are there idle vehicles or excess vehicle down time?
- Is there unused capacity on vehicles being operated?

- Could agencies that currently purchase transportation services, or use volunteers to provide transportation for their clients, purchase transportation services from a coordinated system at a lesser cost?
- Could the local taxi operator fill some, or all, of the demand by means of accessible, multipurpose taxis, and thereby reduce the need for other service providers?
- Could intercity bus services, equipped with accessible vehicles, be utilized for trips into the nearest town or city, rather than tying up handi-buses, vans or taxis?

If any of the above conditions, or unfulfilled possibilities, exist in your area, it is beneficial to give further consideration to coordinating services on a regional basis.

3.3 Reviewing Options for Coordination

There are a number of options that could be considered, depending on your community's needs:

Coordinate Administration

- Management of operations, by hiring or designating one person or group of persons to manage all services (including operation of vehicles);
- Training programs, such as driver training, client training and first aid;
- Information, referral and marketing functions, by setting up one office and one person to do this;

- Fund raising and grants management, by having one office coordinate initiatives, complete grant applications, report to funding sources, and account for funding; and
- Billing and accounting, by having one office account for the funds and bill each user and participating agency.

Coordinate Vehicle Maintenance and Purchasing

- Maintenance of vehicles (including purchase of parts), by contracting with an outside agency to take care of all participating service providers, or setting up a central maintenance facility and buying in volume; and
- Purchase of gas in bulk from a central supplier.

Coordinate Capital Purchasing

- Purchasing of vehicles, radio equipment, office and computer equipment, etc. by having a number of service providers place one order; or
- One agency orders certain items and adds its order to that of another agency which regularly places large orders.

Coordinate Vehicle Operations

- Centralizing routing and scheduling to time-share vehicles;
- Centralizing dispatching and scheduling for the same purpose; or consolidating vehicles and operating them as a fleet.

Coordinate All Aspects of Transportation Services in One Geographic Area

The inventory of services and potential needs assessment will assist your Task Force in deciding whether to pursue this approach, and at what level. While coordinating all services in one geographic area is likely to be the least costly and most effective alternative for providing services, it will take a significant

commitment by your Task Force and area service providers. It will also take some time to establish criteria and services.

3.4 Applying the Family of Accessible Services Approach

The Family of Accessible Services approach can be best described as the integration of individual transportation services into the overall transportation system within a community. For example, in an urban area, service providers offering several types of service can work together to deliver:

- Specialized door-to-door service;
- Accessible taxi service;
- Community bus service;
- Accessible transit routes (using low-floor buses); and
- Intercity bus service for out-of-town trips.

A barrier-free pedestrian environment is also important, as it allows users access to transportation facilities. This requires (amongst other things):

- Curb cuts;
- Sidewalks that permit the easy movement of mobility devices;
- Sidewalks with audible sounds;
- High contrast edges for visibility as well as a tactile surface for individuals using white canes; and
- Sewer grates that do not snag canes used by persons with sight impairments.

Alberta Transportation has published a *Design Guidelines for Pedestrian Accessibility* on its website. The document can be accessed at: http://www.transportation.alberta.ca/Content/docType369/Production/pedaccdesigng.pdf

The Family of Accessible Services approach has some distinct advantages over individual systems, in that it can:

- Reduce the growing demand for door-to-door services;
- Ensure door-to-door service for those who need it;
- Enhance, above all, mobility for seniors and persons with disabilities.

In rural areas, the range of services is typically not as wide, but options for increased flexibility include the use of:

- Accessible taxis or accessible school buses, for in-community or regional trips;
- Accessible intercity buses (such as those offered by Greyhound Lines of Canada and Red Arrow) for longer trips; and
- Local entrepreneurs operating handibus services.

Local transportation services need to feed regional and long-distance services on a fully coordinated basis, if they are to constitute an effective option for seniors and persons with disabilities.

In October 2011, Alberta Transportation implemented Bus Modernization, a new framework, to create an open market for intercity bus service that allows new entrants into the market. Since implementing this new framework, there has been an increase in the number of intercity bus operators. Through Bus Modernization, a number of intercity bus operators teamed up to form www.AlbertaBus.com, a ticketing portal of independent bus operators. More information on Bus Modernization can be accessed at http://www.transportation.alberta.ca/665.htm.

Chapter 4
Making Basic Service Decisions

After analyzing existing systems and determining customer needs, the Task Force must make a number of basic service decisions before implementing the transportation system. This applies whether you are setting up a new system or coordinating an existing one.

This chapter describes nine steps involved in making basic service decisions, on matters such as system structure, role of the private sector, implementation and monitoring. It is important to make these decisions with participation from all those who may have a vested interest in the transportation system, as well as interested members of the public. You should welcome everyone's input, but set a schedule of deadlines and stick to them in order to have decisions made and agreed to promptly.

4.1 Basic System Structure

STEP 1 - Decide whether to regionalize services or maintain, or implement, a stand-alone system.

Based on the analysis of existing services, client needs and potential funding sources, the Task Force should be able to make an informed decision as to whether to regionalize or maintain stand-alone systems within individual communities. Regional services are obviously more complex to operate, but can result in increased service to clients at a substantially lower cost.

4.2 Role of Private Sector

STEP 2 - Consider the potential role of the private sector in delivering service.

The private sector can be a good source for acquiring capital funding and expertise. Local businesses and organizations should be approached for sponsorship and funding of accessible transportation services.

Smaller communities should consider accessible taxis operated by the private sector. Such services can provide 24-hour mobility, and therefore improve the quality of life for seniors and persons with disabilities.

Things to consider:

- Could accessible taxis do the job, with those passengers requiring financial assistance benefiting from some form of chit system (i.e., a book of "tickets", issued to certain client groups by a municipality or agency, valid for transportation on a local system, either at no cost to the client or at reduced cost)?
- Would a combination of coordinated accessible taxi and handi-bus services be the answer?

This is a crucial decision that must be made at the outset.

4.3 Management Structure

STEP 3 - **Define the management structure for your system.**

Defining roles and responsibilities is key to ensuring an effective and efficient system, whether it is based on handi-buses, accessible taxis, or some combination. Questions that should be answered are:

- Who will be responsible for setting long-term policy?
- Who will manage the system? (This is especially important where services are being coordinated.)
- Who will operate the system? (It could be local municipalities, a board, a private contractor hired by the board, an agency, volunteers, or local service agency.)

4.4 Funding and Pricing

STEP 4 - **Define the funding requirements and funding availability, and review options for client rates (subsidized or non-subsidized).**

Determining funding limitations will impact future decisions on service level and eligibility.

While you may not be able to clearly define revenues and expenses, an estimate will enable you to make further decisions with some confidence. Researching systems provided in other rural Alberta communities will give you an idea of how they manage their funding requirements and set rates.

Alberta Transportation has published a Resource Toolkit that can be used as a resource for accessing available funding. The Toolkit can be accessed at:

http://www.transportation.alberta.ca/content/docType56/Production/Resources_Toolkit.pdf.

4.5 Level of Service

STEP 5 - **Decide on the most appropriate level of service to meet client needs, within funding limitations.**

There are several levels of service, and the level you choose will be dictated by funding availability, client needs, use of volunteers, etc. Consider:

- Peak period service in which work trips predominate;
- Off-peak service in which medical, educational and recreational trips feature strongly;
- Peak and limited off-peak service;
- Advanced reservation service; and
- On-demand service.

You should also consider whether you will provide door-to-door service, curb-to-curb service, assistance with steps or coats, etc. When structuring your system, it is important that you develop clear guidelines or policies to be used by drivers, to ensure that they are aware of what is expected of them. (See Chapter 5 - Important Guidelines ahead, also Appendix C - Glossary of Terms, for brief explanations of service types).

4.6 Eligibility

STEP 6 - **Determine eligibility criteria.**

This is where "who gets to ride" priorities must be set. This step is not intended to limit service, but is essential to set priorities for scheduling and incremental expansion of service. It is really up to each community to determine eligibility criteria that will best suit its needs, and fit its available funding and revenue base.

The following provides some examples of the criteria you may wish to consider:

Physical and Age Criteria

- Persons who use wheelchairs;
- Persons with disabilities who are ambulatory;
- Ambulatory seniors (define age minimum);
- Persons with disabilities of all ages;
- Persons with visual or mental impairments; and
- Attendants/companions of clients.

Trip Criteria

- For work;
- For medical appointments;
- For educational purposes; and
- For shopping, recreational purposes, or visiting.

4.7 Operations and Management

STEP 7 - **Define operational and management requirements.**

Operational requirements include:

- Days and hours of service;
- Fares and collection method,
- Method of dispatch;
- Location of operational headquarters (including dispatching);
- Vehicle needs; and
- Office equipment.

Management requirements include:

- Personnel; and
- Defining policies, rules and regulations of service.

4.8 Implementation Strategy

STEP 8 - **Determine an implementation strategy.**

Once you have undertaken the various steps outlined above, you should:

- Determine marketing techniques;
- Decide how you will monitor the service;
- Choose a start-up date for implementation; and

- Designate a period for trial operation, which could be from one to four months.

4.9 Implementation and Monitoring

STEP 9 - **Implement and monitor service.**

By now you will have established a plan for implementing your service. It is important to stick to the plan and implement the service on a trial basis. Be prepared to implement changes if needed, as no system will be without problems. The onset of major problems can be alleviated for the most part through effective planning and a commitment from all those involved.

Using a trial period, then monitoring the results, will provide the Task Force with the information needed to determine a long-term plan for the system. All problems, complaints and requests for changes should be clearly documented and brought to the attention of the Task Force.

You no doubt will need to fine-tune your system. It is important not to view this as failure, but rather as a way for your Task Force to implement required changes. There is always room for improvement!

Chapter 5
Important Guidelines

Organizations providing local transportation services need to consider many matters, including how to obtain personnel and volunteers, select and maintain vehicles, establish routes and schedules, and set up a dispatching system. Finally, you need to monitor and measure performance.

This chapter addresses these matters.

5.1 Obtaining Personnel and Volunteers

To provide an effective accessible transportation service, your personnel - whether they are paid employees, volunteers, or some combination - must be punctual, courteous, professional and considerate to the client.

Some smaller operations may find that they can get by using only volunteer staff, with the management of the system being done through the municipal office or local social service agency. One factor to bear in mind is that while rural Albertans have always been willing volunteers, expanding personal workloads and responsibilities make it increasingly difficult to obtain volunteers who are flexible and able to dedicate time to an ongoing commitment.

If several systems are being coordinated, you may find that hiring personnel to operate the system is your best option. Depending on the system's size and operating budget, you may find it necessary to hire a system manager/coordinator and a driver.

Use of accessible taxis for all or part of your needs has the advantage of utilizing the taxi company's staff for such functions as scheduling, dispatching and driving.

For the protection of your clientele (and of those who take managerial responsibility), you should undertake background checks on all drivers (staff and volunteers), and obtain driver abstracts if required. Staff and volunteers should also be required to take confidentiality oaths to protect your clients.

Selection of a Manager/Coordinator

The two most important ingredients in a successful rural transportation system are a strong local Task Force that is responsible for setting policies and a Manager/Coordinator who is responsible for the day-to-day operation of the system. The criteria for selecting a Manager/Coordinator may differ from area to area, depending on the size of the system and the role played by accessible taxis, but there are some common attributes to look for:

- Sound judgement – to have clear thinking on current issues, and fair judgement;
- Diplomacy and tact - to be used in dealing with people on all levels, reaching compromises, and motivating others (sensitivity to people and their needs is very important);
- Management ability - to handle employees and volunteers, organize necessary paperwork, and make sound financial decisions; and
- Sales and promotional ability - to work with elected officials, sell the service to clients, and instill pride in employees and volunteers.

Selection of Drivers

Drivers, whether they are paid employees or volunteers, are crucial to the success of a rural transportation system. They are in direct contact with the clients of your system.

When selecting drivers, there are a number of basic requirements to look for:

- An understanding of the various types of disabilities and their impact;
- Sensitivity to the needs and feelings of people, and reliability in carrying out assignments punctually;
- A safe driving record and valid operator's licence;
- A working knowledge of the area to be served;
- A friendly nature and a genuine willingness to help people; and
- The ability to complete any required training, such as defensive driving or first aid.

At the very least, drivers should be given basic training in the policies and procedures of the transportation system, as well as in operating vehicles, associated wheelchair lifts and tie-downs. *A Guide for Drivers of Seniors and Persons with Disabilities* is now available from Alberta Transportation. The document can be accessed at: http://www.transportation.alberta.ca/524.htm

Where driving record and validity of licences are concerned, drivers should be required to provide an abstract of their driving record depending on the number of passengers being transported per vehicle, the class of the driver's licence may differ. Both driver records and clarification of the class required can be obtained from Alberta Registries offices throughout Alberta. (For more information, contact Alberta Registries using the information provided in Appendix A).

Selection of Other Employees and Volunteers

Needs will differ with the size of the operation, but the following staff may be required:

Dispatcher

- Receives phone requests from prospective riders and dispatches vehicles accordingly;
- Must be courteous, efficient and have a calm, friendly telephone voice;
- Must be motivated to achieve maximum cost-effectiveness through "creative dispatching", which means the ability to organize and schedule requests for rides where the same vehicle carries as many persons as possible in the same direction, while not unduly inconveniencing anyone; and
- Must be able to pitch in around the office on other tasks that may need to be accomplished.

Secretary

- Handles paperwork and general record keeping, and assists the Manager/Coordinator in administrative functions.

An Accountant is not usually required for such operations. Accounting services can be performed on a part-time basis by other staff members, or by municipal staff.

5.2 Selecting Vehicles

Selecting the proper vehicle for your needs is key to the success of your transportation system.

The type of system you develop and needs of your customers will dictate the most suitable vehicle. In cases where individual transportation services are to be combined into one regional system, there may already be a variety of vehicles

available. Each should be evaluated for its usefulness to the newly developed system.

Drivers, either paid or volunteer, should fill out a daily check sheet which includes fuel, oil, tire pressure, battery, horn and lights (including signal lights, headlights, emergency flashers and brake lights). This check sheet should be handed to the Manager/Coordinator of the system upon completion.

The following points should be assessed objectively when selecting or evaluating existing vehicles:

Type and Scope of Service Planned

- Will your system feature fixed routes, on-demand service, advanced reservation, or regularly scheduled service?
- What is the potential ridership and estimated mix of wheelchair and ambulatory users?
- What are the potential capacity requirements?

Requirements for Vehicle Maneuverability

- Will the vehicle be required to operate in lanes, private driveways, or other restricted situations?
- Will height or length be a restriction (i.e., will low canopies or short loading bays be encountered at some pick-up and drop-off points)?

Suitability for Passengers

The following should be considered in determining vehicle suitability:

- Ease of access and headroom;
- Need for power or manual lifts;
- Safety record;

- Security of riders (on lift and in vehicle);
- Appropriateness of tie-downs;
- Passenger comfort and visibility; and
- Availability of appropriate emergency exits.

Operational Suitability

Given that most systems will have more than one driver, it is best to keep operational needs simple. Some things to consider are:

- Simplicity of design and construction;
- Flexibility of operation (such as use for different purposes);
- Durability of mechanical parts, body and ancillaries;
- Standardization of components;
- Ease of maintenance; and
- Ease of driving (e.g., does the vehicle have air brakes, which could require special driver training?).

Capital and Operating Costs

Costs are an important factor when considering the purchase or retention of a particular vehicle, the following should be evaluated:

- Initial capital cost and depreciated value;
- Operating and maintenance costs;
- Anticipated life (or remaining life) of the vehicle;
- Probable cost per vehicle kilometre; and
- Storage needs and costs.

You should also obtain details on Canadian Standards Association (CSA) standards D409 on accessible vehicle requirements, 2604 on mobility aids, and 2605 on securement and restraint systems. While the Government of Alberta may not adopt these requirements in their entirety, it will be useful for transportation providers to know what they are as they plan to acquire vehicles. (CSA standards can be obtained from International Network; see Appendix A for ordering information).

5.3 Maintaining Vehicles

The importance of vehicle maintenance cannot be over emphasized. Passenger safety and comfort, along with cost-effective operation, must remain primary goals of every system. Some matters to be considered are:

- If a community has developed a transportation system by coordinating previously individual services, there will no doubt be a mix of vehicle makes, models and conditions, instead of a fleet of the same type of vehicles where maintenance can be carefully monitored.
- If your drivers are paid, they should be made responsible for routine maintenance functions, such as vehicle cleanliness and daily checks of gas, oil, tire pressure, belts, battery charge and overall appearance. Drivers should fill out daily vehicle check sheets and turn them into the Manager/Coordinator.
- If you rely solely on volunteer drivers, most would likely be willing to complete the same routine maintenance check before using the vehicle. However, they may not want to undertake the added paperwork.
- Mechanical maintenance must be done by trained professionals. Smaller systems just starting out often contract with the service departments of local

vehicle dealers for regular inspections, repairs and maintenance of all vehicles in the system, regardless of make, model, or age.

- If your system is large enough, you may wish to hire a mechanic as a member of staff, in which case proper storage and other facilities would be required. An added bonus: there would be someone who could also repair minor body damage, as every transportation system needs this type of work done from time to time. Alternatively, it may be possible to arrange mechanical service or facilities through other means, such as a local vocational school.
- Preventative maintenance is an absolute must. Taking care of problems before they happen can save not only money, but also reduce service interruptions, injuries or worse.

5.4 Routing and Scheduling

The success of a transportation system can depend largely on having effective routing and scheduling, and on the impressions that your clients, taxpayers and elected officials have of the system. Your system should be reliable, punctual and responsive, and make the most efficient use of limited equipment and labour.

There are many routing options available, and you should choose the best one to meet client needs:

Scheduled Fixed Route System

- Regular service operating over the same route according to a pre-established schedule. (The riders of such a system schedule their activities around the times when service is being provided).

Demand Responsive System

- Use of vans, cars or small buses, whereby individuals or groups of individuals can be transported to eligible destinations - such as medical clinics and seniors centres – upon booking rides in advance. Demand-responsive service has to be planned, so that vehicles and drivers can be allocated to meet daily demands. Bookings can be done through an automatic data processing system or manually, depending upon need).

Flexible Routing System

- Scheduled, fixed route system, with the flexibility of a short-distance deviation to provide demand-responsive pick-up and delivery when requested by passengers or dispatcher.

Advanced Reservation

- Door-to-door service whereby the client calls a central office to book a ride (often requires at least 24 hours advance booking).

5.5 Dispatching

Taking reservations and relaying service instructions to drivers is an important customer service function.

Effective dispatching skills are required to achieve maximum cost-effectiveness and to schedule requests for rides, especially with a regionalized, coordinated system. There are a number of demand-responsive service alternatives for dispatching, and choosing the right one to meet the needs of your clients will enable your system to operate as efficiently as possible:

Many-to-few Service

- From any given point to a limited number of destinations within a specified area.

Few-to-many Service

- From a limited number of origins to any other point within a specified area.

Many-to-many Service

- From any given point to any other point within a specified service area. (Because routing is completely flexible, routes travelled are solely in response to desired origins and destinations).

Many-to-one Service

- From multiple points within the service area to a common destination, such as a senior citizens centre.

One-to-many Service

- From one common location to multiple destinations.

5.6 Monitoring and Measuring Performance

Early on in the implementation of your system, you should establish a method of monitoring and measuring performance. The measures should be closely tied to the goals and objectives established for the system, enabling you to compile the data needed to determine whether you have been successful in meeting your goals.

For most transportation systems, performance can be divided into two categories: operational and financial. Performance measures can be simply structured as:

Output Measures

- Actual service provided (i.e., the timeliness and quality of the system, specifically the number of trips provided on a per-unit basis).

Outcome Measures

- Impact of the service on clients (i.e., client satisfaction).

The development of such measures will allow you to monitor your system from many aspects, to enable you to provide concrete reports to the Task Force, funding agencies and your clients on how the system is performing. In developing measures, it is important to establish benchmarks or comparisons. In some cases, you may have to make some assumptions to enable you to draw comparisons. (While this is quite acceptable in measuring performance, your assumptions should be documented and clearly understood by all concerned).

The following are examples of basic measures that could be further developed to meet the needs of your system (although each system must establish its own measures consistent with its goals and objectives):

Operational Measures

Sample Output Measures

- Number of trips provided monthly (for coordinated systems, this statistic could be compared to the monthly number of trips provided by the individual systems);
- Number of trip cancellations;
- Total passengers carried compared to total trip capacity; and

- Number of trips without accidents or incidents involving passenger safety.

Sample Outcome Measures

- Level of client satisfaction (measured through surveys, complaints, adhoc interviews with sample group, meetings, etc.); and
- Number of complaints.

Financial Measures

Sample Output Measures

- Total expenses versus revenues received;
- Total cost per trip versus rate charged per trip;
- Cost per trip compared to transportation systems in other jurisdictions; and
- Cost per vehicle.

Sample Outcome Measures

- Level of client satisfaction with rates and services provided; and
- Number of complaints.

As you will note from the above, client satisfaction plays an important role in the success of your system. For smaller systems, it may be sufficient to monitor the comments and complaints directed to the drivers, since they are the primary contact with the client. For larger systems, one of the most highly used methods is a survey. The following are some types of surveys that could be used:

Mail-out Surveys

These seek direct answers to questions, but are often not completed and returned by the clients. (As with any survey, it is important to ask the right questions. You may wish to send the survey to only a sampling of your client

group that has previously agreed to participate, so as to obtain a higher response rate).

Personal Interview Surveys

- These allow the interviewer to explain each question to the person being interviewed, and the client to clearly state answers, enabling more information to be collected. (However, such surveys require considerable manpower and time to complete).

Telephone Surveys

- These can be done quickly and efficiently, but it is important to keep the survey short and to focus on key points. (It is also important to allow the client to provide comments on all matters concerning the transportation service).

Public Meetings

- This is an excellent communication tool by which to advise your clients and the community at large of new policies and procedures. (Such meetings are generally not effective if you want to get feedback on services, as some clients and community members do not feel comfortable speaking out in such a setting).

Prior to undertaking your survey, you must decide:

- Who you are going to survey;
- What type of information you need with respect to the survey participant;
- What key areas of your service you would like to obtain comments; and
- When you want the survey completed.

The results of the survey should be summarized and discussed with your Task Force. Appropriate changes to the system should be implemented which would alleviate any legitimate concerns that were outlined in the survey. Finally, it is

important to communicate with your clients about the survey and the action your Task Force plans to take in the future.

Chapter 6
Administrative Needs

Because rural transportation systems operate with limited financial and human resources, they must be effective and efficient in their administration. Proper accounting and record keeping must be maintained to provide justification for potential grant funding, ensure accountability to the Task Force responsible for operating the system, and comply with audit requirements.

This chapter deals with specific budgeting, accounting, billing, funding sources, record keeping, electronic data management, and insurance.

6.1 Budgeting

Budgeting plays an important role in the planning process of a transportation system, whether stand-alone or coordinated. You will be able to estimate future budgetary needs for your system after you make basic service decisions (e.g., role of accessible taxis, level of service, rates). The first step is to allocate responsibility for budgeting. This person could be a member of your Task Force, a volunteer, or the system Manager/Coordinator. Some general procedures are:

- List all potential costs in detail (such as salaries, benefits, fuel costs and office equipment);
- Divide these costs into categories (administration, operating and capital costs);
- Identify those costs which may be allowable expenses under funding programs, to allow you to determine other costs for which you must raise revenues (either through fares charged to users or fund-raising initiatives);

- Summarize the expenses and revenues and circulate the budget for approval among the Board and participating agencies (if applicable);
- Amend the budget if necessary once funding sources are confirmed;
- Maintain the approved budget on file; and
- Compare, at the end of you fiscal year, the budget estimates to the actual revenues and expenses.

6.2 Accounting and Billing Procedures

Because accounting systems can vary in complexity, it is best to obtain advice from an accountant at the start (This is especially true if several systems are being coordinated). It would also be appropriate to find out what type of documentation will be required to support funding requests then structure your system so that adequate reports can be supplied when needed.

If you are operating a coordinated system, the Task Force must set out policies and procedures for proper accounting of revenues and expenditures. Some areas that should be considered are:

- How much will each participating agency provide to the coordinated system? (For example, an area nursing home may agree to pay a set amount per year to allow its residents access to the transportation system).
- Although rates per passenger may have already been determined, the actual billing procedure must be set. Will clients pay on a per trip, weekly, or monthly basis? Will they be required to pay in advance or be billed at pre-set times for trips taken?

- Reporting requirements should be determined and procedures established to enable reporting to be undertaken simply, and in a timely fashion.

Even in the simplest of systems, it is recommended that separate accounts be kept for each category, such as:

Revenues

- Passenger fares;
- Prepaid passenger fares or passes;
- Revenue from charter trips;
- Operating grants;
- Revenue from participating agencies; and
- Other revenue.

Expenditures

- Administration;
- Maintenance of vehicles; and
- Operation of vehicles.

6.3 Funding Sources

To maintain your system, it is important to seek funding sources aggressively, and to understand the implications of each funding program.

It is also important to allocate responsibility for seeking out funding programs, contacting appropriate agencies and governments, and making arrangements to

access them by completing applications. This is an ongoing requirement for your Task Force, if it is to be able to plan and implement an effective transportation service. If you are thinking of purchasing a new vehicle, you should first consider the potential of the accessible taxi option, or the possibility of pooling vehicles with other service providers in your region. There may be underutilized vehicles already in the area.

Potential funding sources include:

Alberta Transportation provides a number of funding programs to municipalities to meet their transportation needs. Municipalities have the discretion to allocate these funds to meet their priorities. The following funding programs provided by the department that support transportation options for seniors.

- **Basic Municipal Transportation Grant (BMTG) –** This program provides cost-shared financial assistance to cities (excluding Calgary and Edmonton) in developing and implementing capital projects including public transit system requirements and barrier free initiatives, such as the purchase of low-floor buses and handi-buses.

- **Federal Gas Tax Fund (FGTF) –** This program provides financial assistance to municipalities in support of sustainable capital municipal infrastructure to maintain or enhance economic, social and cultural opportunity and wellbeing. Projects can include public transit systems as well as barrier free transportation initiatives, such as the purchase of accessible vehicles.

- **Municipal Sustainability Initiative (MSI) –** Through this program, Alberta Municipal Affairs provides funding to municipalities to address essential infrastructure and operating needs. Within broad program guidelines, the locally elected municipal council is authorized to decide which projects to fund with its MSI allocation. Service providers, including accessible transportation operators in rural and urban centers, are encouraged to work with their local municipal councils so that MSI can be used most effectively to support local

priorities. For more information on this program, please visit Alberta Municipal's website at: http://www.municipalaffairs.alberta.ca/msi.cfm or contact your local municipal office or Alberta Municipal Affairs using the information in Appendix A.

Other Sources

Local service clubs (such as the Lions Club or Kinsmen Club), senior citizens organizations, local social service agencies, nursing homes, local businesses and private donations are all potential sources of funding that should be investigated. Some communities also find that specific events, raffles, and so on, can be excellent sources of funding.

6.4 Record Keeping

Because effective service requires good organization, you should consider developing the following types of records to manage your system:

- Information on eligible riders and users of the system;
- Daily kilometre and passenger-count logs for each vehicle;
- Complete fuel data, signed daily vehicle check lists, and maintenance records on each vehicle;
- Record of dispatcher's instructions to drivers (if applicable);
- Weekly, monthly, and annual cost per-passenger, per-kilometre analysis;
- Budget files;
- Personnel records (i.e., salaries, benefits, timesheets); and

- List of volunteers.

In any operation, the more accurate and complete the client registration information, the quicker and more accurate trip reservations will be for all parties. Information on type of disability, wheelchair specifications, designated escort, address, contact in case of emergency, and so on should be retained in client files.

6.5 Electronic Data Management

In today's world, computerization is a must for most operations because it assists in providing efficient customer service. Computers can be used as an effective records-management system, as current database software packages provide sorting and searching capabilities that would otherwise have to be done manually.

In addition to cost, consideration should be given to these factors when selecting software:

- Support services and training provided by the software company;
- Flexibility of the software: in reporting and sorting data; and
- Experience and past performance of the software in actual work settings.

Extensive knowledge of the special transportation service, including scheduling and booking procedures, is essential in deciding which software package will best suit your needs. It is also important to remember that the software will only be as effective as the persons who use it therefore, adequate training is required.

Information on transportation-related software packages can be obtained from larger computer and software dealers.

6.6 Insurance

Adequate insurance for transportation systems is essential to protect passengers, vehicles, employees, the system itself, and other people and property.

It is important to review your options and know your insurance needs. Consult with other system operators in your area about how they handle their insurance requirements. It is best to contact several insurance brokers to obtain information on coverage and costs, which can differ depending on the type of organization owning and operating the system.

Depending on individual circumstances, it may be beneficial to operate the system within the jurisdiction of the local municipality; that way, vehicles can be considered part of the municipal fleet and coverage secured under one plan at less cost. If you require additional information which your insurance broker has been unable to provide, you can contact the Insurance Bureau of Canada (see Appendix A for more details).

Chapter 7
Other Considerations

There are several other considerations, including selecting a consultant, making the best use of volunteers, and avoiding the pitfalls in creating a successful system.

These are discussed in this final chapter.

7.1 Selecting a Consultant

With reduced resources in many areas, some communities may not have the ability to undertake a detailed planning project. An outside consultant can fill the gap and bring a new dimension to the study process.

Depending on the scope of your community's needs, you may wish to hire a consultant to undertake all of the planning steps outlined in this guide, or just some of them (such as the analysis of needs). When selecting a consultant, your Task Force should invite proposals from those known to specialize in accessible public transportation. Requests for proposals should include:

- Letter of invitation from your Task Force;
- Terms of reference for the project which detail the objectives, tasks, results expected, and timelines; and
- Date when the proposal is to be received.

A Request for Proposals should be sent to between three and five potential consultants. (There is little to be gained by sending it to a larger number, as this only creates more work for reviewers).

Evaluation of the proposals can be done in a number of ways, but whatever approach is selected, you should ensure that your Task Force reviews the submissions thoroughly prior to awarding the project. To simplify the process, a form can be developed which can be used by Task Force members in summarizing their views on each proposal. (A sample of an evaluation form is attached as Appendix D). The results of individual Task Force member evaluations should be discussed, and agreement reached on the successful consultant.

The contract with the consultant can be a formal document, or simply a purchase order with the terms of reference and consultant proposal attached. Formats for formal contracts are available from sources such as the Association of Professional Engineers, Geologists and Geophysicists of Alberta (see Appendix A for information on how to contact this Association). Your local municipality may also have experience with hiring consultants, and therefore might be able to help.

It has been found that studies involving extensive data collection are best carried out in the spring or fall. Summer months are not a good time to collect ridership data, and interviews are generally more difficult to arrange.

7.2 Making the Best Use of Volunteers

Volunteer labour is an important aspect of social service agency transportation programs. Many communities have a volunteer referral group which is an excellent resource for various community activities.

Volunteers can be drivers, dispatchers or area coordinators, or do just about any other job in your transportation system. Sometimes they are reimbursed for their expenses; sometimes they are not. Ways to enhance their value include:

- Make volunteers feel they are needed, by implementing a recognition program within your organization (such as "Volunteer of the Month", with notice in the local newspaper or newsletter);
- Design your system so that they play a logical role in the system that is unique from paid employees (for example, volunteers could deliver a personal service that would be too expensive to provide using paid labour);
- Avoid complicating reporting and cost reimbursement procedures; and
- Make sure they are aware of what is expected of them, by providing job descriptions and information on policies and procedures.

If coordination is being planned, and volunteers were previously being used by the individual service providers, you should explain their role in the new system and the value of their continued assistance. Be careful when mixing paid with volunteer drivers in the same service area, as some volunteer drivers may begin to wonder why they are volunteering if the system can afford to pay others.

7.3. Avoiding the Pitfalls

Experience has shown that implementing a new transportation system or coordinating an existing one is not easy. Your Task Force must be aware of pitfalls and be able to deal with them effectively, because they can cause a system to fail if not appropriately handled.

Here is some advice:

- Check for various accessible transportation options at the outset.
- Establish regular formal and informal lines of communications. (Poor communication between system manager/coordinators, their employees, superiors and funding sources must be avoided).
- Avoid accounting omissions which can give a false picture. (All costs of managing the system must be included in reports to the Board and funding agencies. The cost of vehicle replacement, insurance, overhead, staffing, benefits and all other expenses related to the system must be included, to provide an accurate financial picture and assess cost-effectiveness).
- Conduct surveys, hearings, meetings and other forms of two-way communications. (Lack of interest and support from the public can be fatal for your system. Keep them informed by conducting annual, if not more frequent, public meetings to consider ideas for revised schedules and routes; respond promptly to letters and calls).
- Prepare logical arguments for a coordinated approach, and make them with tact and firmness. (There may be some resistance to coordination, because human nature makes some people want to protect their turf. The rationale for coordination is very convincing; appeal to the individuals involved on the basis of reason).
- Resist the idea that the perfect formula for success must be found before starting. (Some people are more concerned with long-range plans than with meeting unmet needs now. Within reason, start to deliver rides as soon as possible; then refine and let the transportation system grow and expand as actual needs dictate and finances permit).
- Avoid bureaucracy. (Resist pressure to hire unnecessary employees and invest in frills).

- Avoid geographical imbalance of service within the jurisdiction of the transportation system. (Spread service around carefully to fully cover all sections of the service area which legitimately require it).
- Make sure your services are fully coordinated with existing intercity bus services. (Some of these are already wheelchair-accessible, and others may become so in future. It is in the best interests of everyone to support this valuable community asset and, if feasible, take advantage of it where your customers need long-distance transportation to access health care, recreation, or other services).
- Above all, look down the road. You must anticipate the inevitable need to replace vehicles, usually after five or six years, and to address the always changing service needs. Develop a realistic vehicle replacement plan, and constantly review your product to ensure you are meeting current needs.

Appendix A
How To Obtain Information

Alberta Municipal Affairs:

Local Government Services Division, 15th Floor, Commerce Place, 10155 - 102 Street, Edmonton, Alberta T5J 4U

Phone: 780-427-6534

Website: http://www.municipalaffairs.alberta.ca/

Alberta Registries:

Registrar, 9th Floor, Brownlee Building, 10365 - 97 Street, Edmonton, Alberta T5J 3W7

Phone: 780- 427-4095

Website: http://www.servicealberta.gov.ab.ca/registries.cfm

Alberta Transportation:

Multimodal Transportation Section, Strategic Policy Branch, 3rd Floor, Twin Atria, 4999 - 98 Avenue, Edmonton, Alberta, T6B 2X3

Phone: 780-415-0688

Website: http://www.transportation.alberta.ca/

Association of Professional Engineers, Geologists and Geophysicists of Alberta:

15th Floor, 10060 - Jasper Avenue, Edmonton, Alberta T5J 4A2

Phone 780- 426-3990

Website: http://www.apega.ca/pdf/SalarySurvey/SSH_05.pdf

Insurance Bureau of Canada:

1105 - 10080 Jasper Avenue, Edmonton, Alberta T5J 1V9

Phone: 780- 423-2212

Website: http://www.ibc.ca/en/

Transport Canada:

Intergovernmental Affairs and Accessibility, 26th Floor, Place de Ville, Tower C, 330 Sparks Street, Ottawa, Ontario KIA ON5

Phone: (800) 665-6478 (toll-free), (800) 823-3823 (TTY, toll-free)

Website: http://www.tc.gc.ca/eng/menu.htm

Appendix B
Bibliography

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Alberta Transportation Guidelines for Design of Safe Accessible Pedestrian Environments, (undated), 4 pp. + Att.

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United States Department of Agriculture, Rural Rides: A Practical Handbook for Starting and Operating a Rural Public Transportation System, (November, 1979), 27 pp.

United States Department of Transportation, "Planning for the Mobility of Elderly and Handicapped Persons", Elderly and Handicapped Transportation, (1979), 5 pp.

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Appendix C
Glossary of Transportation Terms

Once a Task Force has been established to plan and manage your rural transportation system, it is recommended that all parties familiarize themselves with commonly used transportation terms.

The following list was compiled for the average citizen who may need to communicate with professional planners when coordinating a local transportation system. (These terms may or may not be used in this guide).

Accessible: transportation facilities that have no barriers preventing their use by all travellers.

Accessible intercity bus service: intercity bus service equipped to accommodate persons using mobility devices.

Accessible taxi service: taxi service equipped to accommodate persons using mobility devices.

Access time: time required to walk or drive to and from the transportation service.

Ambulatory clients: persons with disabilities who are not wheelchair bound but have difficulty getting around because of physical or mental challenges.

Average cost per passenger: average total cost per vehicle, divided by the average number of passenger tips made per hour.

Average daily traffic (ADT): average number of vehicles passing a specific point during a 24-hour period. (Annual Average Daily Traffic [AADT] denotes that the daily traffic is averaged over the calendar year. Annual Average Weekday Traffic [AAWDT] denotes that the specified period includes only weekdays, Monday through Friday).

Average productivity: number of passenger trips made by a vehicle within a given period of time.

Average ridership: total number of passenger trips divided by the total number of service days (usually determined on an annual basis).

Call and demand: system which picks up only those persons who call in advance requesting service.

Capacity: total number of passengers that can be carried by a vehicle or a fleet at a given point in time; the number of vehicles per hour which can be served on a link at the speed indicated.

Capital cost: cost of vehicles, equipment, and facilities, exclusive of administrative, operating, maintenance and marketing costs.

Chit: book of "tickets", issued to certain client groups by a municipality or agency, valid for transportation on a local system, either at no cost to the client or at reduced cost.

Cost-benefit analysis: in-depth study of expected costs or expenditures, and benefits or receipts that may be incurred from a particular project.

Cost effectiveness: ratio of the cost of a system to the level of service. (Four major unit cost measures can be used either separately or together to determine cost effectiveness: total cost per vehicle hour, total cost per vehicle kilometre; total cost per passenger trip; and total cost per passenger kilometre).

Deadhead: movement of a vehicle without passengers or cargo (e.g., from the garage to the beginning of the transportation route).

Demand density: number of requests for service per unit area, typically per zone or square kilometre.

Dispatch: relaying of service instructions to drivers.

Dynamic routing: process of modifying a vehicle route to accommodate service requests received after the vehicle has been dispatched.

Express service: operation designed to make a limited number of stops between relatively long distances along a given route. (See **Local service**).

Extra-off: client who wishes to leave the vehicle at a point before or after a scheduled destination.

Extra-on: client who wishes to board a vehicle at a point before or after a scheduled destination.

Family of Accessible Services approach: mix of transportation systems, including accessible taxis and intercity buses, used to deliver a cost-effective service.

Fare: authorized amount charged for transportation.

Fare box: container near the driver in which is deposited money, tokens, or tickets used by passengers to pay for the ride.

Feeder service: local transportation service which connects with another (usually) express or long-distance service; or services which provide access to already existing public transportation systems.

Few-to-many service: demand-responsive service from a limited number of origins to any other point within a specified area.

Fixed Costs: costs which remain constant regardless of the level of activity or production.

Fixed route system: regular service operating over the same route according to a pre-established schedule. (Riders of such a system must schedule their activities around the times when service is being provided, in contrast to a demand-responsive system).

Flexible routing: scheduled, fixed route with the flexibility of a short-distance deviation to provide demand responsive pick-up and/or delivery when requested by passengers or dispatcher.

Hardware: various pieces of equipment necessary for operation (radios, vehicles, computers, etc.).

Headway: time required for successive vehicles travelling at the same speed and direction to pass the same point (used to plan the orderly dispatch of vehicles).

Home-based trip: trip with one end at the residence.

Interzonal trip: trip with its origin and destination in different zones.

Intrazonal trip: trip with both its origin and destination in the same zone.

Interface: transfer activity and facilities required for transfers between transportation modes (e.g., handi-van to intercity bus),

Latent demand: estimated number of trips not made because service is not accessible or available.

Layover: time allowed at a terminal between arrival and departure, for turning vehicles, recovery of delays, and preparing for return trip.

Level of service: convenience, comfort, safety and utility of a system (measured differently for individual systems).

Lift: device which raises and lowers a platform to accommodate the entrance and exit of wheelchair users and others with disabilities.

Load factor: number of passengers actually carried, divided by the total passenger capacity of a vehicle.

Local service: operation designed so that vehicles make frequent stops between relatively short distances along the route.

Manual service: demand-responsive service that operates without the assistance of automatic data processing equipment in the control centre.

Many-to-few service: demand-responsive service from any given point to a limited number of points.

Many-to-many service: demand-responsive service from any given point to any other point within a specified service area. (Routing is completely flexible and, consequently, routes travelled are solely in response to the desired origins and destinations of the passengers).

Many-to-one service: demand-responsive service in which passengers are collected from multiple points within the service area, for transportation to a common destination such as a senior citizens centre.

Minibus: small bus vehicle seating from eight to 20 passengers.

Mobility impaired (limited): any of the transportation disadvantaged. (It is sometimes restricted to those with specific categories of physical or mental limitations in travelling).

Multiple-stop dispatching: driver is assigned a series of stops which must be completed before the next assignment.

Network: configuration of routes and stops which constitute the total system.

Off-peak: time periods during which travel activity is low.

One-to-many service: demand-responsive service in which passengers are collected from one common location for transportation to multiple destinations. (Reverse of **Many-to-one** service).

One-way passenger trips: total number of boarding passengers carried on all routes in a given month.

Paratransit: flexible transportation services, operated publicly or privately. They are typically small scale, operating with low capacity vehicles, such as, dial-a-ride, minibus, subscription service and van pools.

Park and ride: intermodal trip where the driver of an automobile parks and changes to a public transport service.

Passenger kilometre: transportation of one passenger over a distance of one kilometre.

Passenger revenue: total amount of fares paid by passengers (sometimes called farebox revenue).

Passenger trip: one person travelling one way from origin to destination (round trip is two one-way trips).

Peak demand: largest number of demands during a specified period.

Peak period: specified time during which the maximum amount of travel occurs.

Persons with (transportation) disabilities: persons who have a physical, mental or medical disability such that they are unable to board vehicles with dignity.

Radial network: transportation pattern in which most routes converge into and diverge from a central hub (as do the spokes of a wheel).

Ramps: inclined passageway adaptable to mass transportation vehicles and capable of boarding and deboarding a wheelchair user.

Recovery time: extra time scheduled at the outer terminals of a route to allow for rest stops and to help make up lost time.

Ridership: number of passengers who ride in a vehicle during a one-way trip.

Rolling cost: variable costs measured with reference to time or distance (normally includes drivers' salaries, gas, and oil).

Rolling stock: vehicles used in a transportation system.

Route: established course of travel within the transportation network.

Route deviation: service pattern, in demand-responsive transportation, which allows a vehicle to depart from an established route upon request.

Run: one vehicle trip in one direction on a route (a round-trip consists of two runs).

Scatter: distribution of passengers to many destinations from a single origin such as a rail depot, typically involving prescheduled or regular service (also known as **One-to-many** service).

Scheduled maintenance: vehicle inspection and repairs performed during predetermined intervals of time or kilometres.

Shared-ride taxis: demand-responsive service in which taxis are allowed by regulatory authorities to carry, at any one time, several unrelated passengers with different origins and destinations.

Shuttle: public conveyance which travels back and forth over a particular route, especially a short route or one connecting two transportation systems.

Shuttle service: service operating between two major activity centres as demand for rides dictates.

Single-stop dispatching: operating procedures whereby driver receives instructions for next route segment at each assigned stop.

Software: set of programs, procedures, and related documentation associated with the operation of a system.

Start kilometres: kilometres showing in the odometer at the beginning of the daily run when the vehicle left the yard or storage facility.

Stop kilometres: kilometres showing in the odometer at the end of the day when the vehicle reached the storage garage or yard.

Subscription service: service, usually from home to work and return, at a particular time and upon advance reservation, for a monthly fee.

Taxi service: exclusive ride services operated by taxi companies for the general public under applicable municipal and provincial licensing by-laws and regulations.

Terminal time: time required to unpark and to park, and additional walking time required to complete the trip exclusive of the actual travel time.

Tickets: printed paper receipts entitling a passenger to a ride or a series of rides.

Tour: route plan and schedule for a vehicle to follow in serving a specified set of passenger requests.

Travel time: time required to travel between two points, not including terminal time.

Vehicle hour: operation of one vehicle for one hour. (See **Cost effectiveness**).

Vehicle kilometre: operation of one vehicle over the distance of one kilometre. (See **Cost effectiveness**).

Appendix D
Consultant Proposal Evaluation Form

Consulting Firm:

Evaluator:

Item	Rating		Weighting Factor	Weighted Rating
	Initial	Final		
1. Management				
2. Expertise				
3. Methodology				
4. Social Aspects				
5. Other				
Total				

I (Rating: 5 = Excellent, 1 = Poor)

(Use weighting factor based on how important you feel each of the items is to the project. For example, "Methodology" may have a weighting factor of 8, "Social Aspects" only 2).

COMMENTS:

1. Management:

2. Expertise:

3. Methodology:

4. Social Aspects:

5. Other: