



A Jurisdictional Review of Canadian Initiatives to Improve the Affordability of Public Transit for People Living on a Low Income

Beth Dempster and Eric Tucs
Civics Research Co-operative
February 2012



Authors:

This report was prepared for Toronto Public Health by Beth Dempster and Eric Tucs of The Civics Research Co-operative (<http://civics.ca>).

Citation:

Dempster, B. & Tucs, E. (2012). A Jurisdictional Review of Canadian Initiatives to Improve Affordability of Public Transit for People Living on a Low Income. Kitchener, ON: The Civics Research Co-operative.

Acknowledgements:

The authors gratefully acknowledge the contribution of the following individuals:

The members of the Toronto Public Health Project Advisory Committee: Rita Paul-Sengupta, Karen Wade, and Jan Fordham

The key informants who shared their insights about the implementation and operation of the various discount transit programs included in this report (See Appendix 1)

The individuals who provided feedback on the report:

Laurel Rothman, Family Service Toronto/Campaign 2000

Brenda Roche, Wellesley Institute

Julie-Ann Pajkovic, Toronto Employment and Social Services

Paulina Salamo, Toronto Public Health

Monica Campbell, Toronto Public Health

Roland Tanglao for posting “TTC Reflections”, the photo used on the cover, under a Creative Commons (Attribution 2.0 Generic) Licence.

Distribution:

Available at: <http://www.toronto.ca/health>

For more information about this report please contact:

Toronto Public Health, Healthy Public Policy

277 Victoria Street, 7th Floor

Toronto, Ontario M5B 1W2

Telephone: 416-338-7030 Fax: 416-338-8126

February 2012



Contents

Contents	3
Executive Summary	5
Introduction.....	7
Research Methods	7
Report Structure	8
Profiles: Discount transit pass programs	9
Region of Waterloo.....	9
City of Calgary	15
City of Hamilton	19
City of Kingston	22
City of Windsor	25
York Region.....	28
City of Guelph.....	32
Provincial transit pass programs.....	36
Other types of programs and subsidies	38
Discussion: Comparisons, challenges, successes	41
Closing Comments.....	48
References	50
Appendices	56
Appendix 1: List of Key Informants and Other Contacts	56
Appendix 2: Canadian Programs Directed Toward Increasing the Affordability of Public Transit for People with Low Incomes(Tables)	58

Executive Summary

Public transit plays an important role in quality of life by facilitating access to factors that contribute to health. It is critical to accessing food, employment, education, health services and social and recreational activities. It also enables connections with family and friends and other supports that can help reduce social isolation. For people living on a low income, the costs associated with public transit can be a barrier to its use and can contribute to social exclusion.

The purpose of this report is to describe initiatives that have been implemented in municipalities across Canada to increase the affordability of public transit for people living on a low income. Internet keyword searches were used to identify initiatives. Consideration was also given to the twenty four communities that comprise the Canadian Federation of Municipalities' Quality of Life Reporting System because these are urban centers with public transit systems.

Fifteen jurisdictions that are currently implementing discount transit programs were identified. Of these, seven are profiled in this report: Region of Waterloo (established in 2002), City of Calgary (2005), City of Hamilton (2008), City of Kingston (2009), City of Windsor (2011), Region of York (2012), and City of Guelph (2012). These initiatives were selected to reflect both well-established and new programs in order to provide a diversity of perspectives. Consideration was also given to communities with a strong history of advocacy regarding transportation and to initiatives that are well documented. While the focus of these profiles is on discount transit pass programs, a few jurisdictions are also implementing discounted transit ticket programs whereby community agencies are able to purchase tickets at a reduced rate from transit authorities that they then distribute to their clients free of charge. These are also described along with two provincial transit pass programs.

Information about the discount transit programs was gathered through key informant interviews and document reviews. Eighteen interviews were conducted with key informants representing social services, transit authorities, and community organizations. Key documents were identified by internet searches, key informants, and project advisory members.

The discount transit pass programs reviewed in this report make monthly transit passes available at a significantly reduced price to patrons with low incomes. Eligibility for most programs was based on having an income below the Low Income Cut-Off. Some jurisdictions also require that applicants be employed. Ontario Works (OW) and Ontario Disability Support Program (ODSP) recipients who were not receiving other transportation supports were also eligible for most of the programs and in two instances programs were specifically targeted to OW/ODSP recipients.

All of the programs are funded from the municipal tax base, with a couple of exceptions. In the City of Hamilton's discount transit pass program and one of the Region of Waterloo's programs, municipal funds are augmented by provincial contributions. Budgets for affordable transit pass programs ranged from \$135, 500 to two million dollars. Only a few programs have some assurance of ongoing funding with the remainder coming from special/reserve funds. Most funds are allocated to social service departments; however in Calgary and Windsor they are allocated to the transit authorities. In most instances program budgets do not take into consideration administration costs – these are largely absorbed by social service departments with additional support from other partners. British Columbia and Saskatchewan are two provinces that provide funding for transit pass programs.

Many factors were involved in the successful establishment of discount transit programs. The involvement of community advocates and champions in the government such as councilors and municipal staff was viewed as being invaluable. Another critical factor in moving ahead was the awareness of the importance of transportation for those living on a low income. Personal stories proved to be a valuable

tool in many communities in promoting this awareness among key stakeholders. In some instances an impending change that would make transit less affordable helped mobilize action (e.g. fare increase, discontinuation of a program) and in some cases having a reserve/special fund that could be used to pilot a program rather than taking the funds from a municipality's operating budget was deemed helpful. Implementation of discount transit pass programs involves some level of partnership, although the degree of collaboration varied considerably between jurisdictions. Participation of city councils, transit authorities, social services and community partners was evident in all programs and was felt to be beneficial because of the different strengths and perspectives each group brought to the table.

Program evaluations of the impact of discount transit pass programs have been conducted in the Region of Waterloo, City of Calgary, and City of Hamilton. Overall the programs were found to be beneficial to users. Some of the benefits noted were having more money available to purchase other necessities and improving access to employment, education, and health services. Maintaining connections with family and friends was also noted as another benefit of the program. In all cases the results were used to support program continuation and/or expansion.

In addition to discount transit pass programs; there are a range of other options that could be implemented to make transportation more affordable such as different types of passes, savings from bulk purchasing of passes, open-ended transfers, community bus programs, shared rides, car pooling, and shared car ownership. Some of these programs are unique while others are found across multiple jurisdictions.

Discount transit pass programs that specifically provide subsidies based on income are few – although increasing in number. Part of the reason for this increase is recognition of the important role that transportation plays in people's lives. There is a real need for affordable transportation for people living on a low income – the question then is how to design programs that build on the successes described here to facilitate greater inclusion of all people in our community, society, and economy to the benefit of all of us.



Introduction

Access to transportation is fundamental to the capacity of people to function in our society. It is critical to accessing services and resources that sustain health and wellbeing. Without access to transportation, getting to work; meeting family, friends, advisors, or peers; accessing services and goods; or availing oneself or one's family of amenities is difficult, if not prohibitively so. The consequences of inadequate transportation then, are far-reaching, and can easily compromise a variety of worthwhile objectives and goals: finding work, taking advantage of training and educational opportunities, looking after one's mental and physical well being (Withall, Jago, & Fox, 2011), connecting with family and friends, and sharing in and contributing to our collective prosperity (WHO Regional office for Europe 2003, WHO 2008, Litman 2012, Muntaner et al 2012).

Inadequate transportation is a key structural barrier that facilitates social and economic exclusion, and, as a consequence, compromises individual and social health and well being (Department for Transport 2004; Direction de Sante Publique 2006; Social Exclusion Unit 2002; Stewart & Reutter, 2004). For those with low incomes, affordability is a key financial barrier to transportation (Sadowski & Chalmers, 2011). Affordable public transit facilitates the inclusion and participation of commuters with low incomes who are very likely to be reliant on public transit to meet their transportation needs (Toronto Board of Trade 2010).

The affordability of public transit for people with low incomes remains a key issue, where the costs of fares remain a significant barrier to use. Several studies emphasize issues around affordability of public transit across numerous Canadian municipalities (Dempster, 2009; Ellery & Peters, 2010; Federation of Canadian Municipalities, 2010; Tucs, Dempster, & Franklin, 2004). To increase affordability, several Canadian municipalities have implemented reduced-cost transit fare programs (outlined in the report and in Appendix 2.)

Toronto Public Health commissioned the Civics Research Co-operative to conduct a jurisdictional review of strategies to increase the affordability of public transportation for people living on a low income. The purpose of this report is to: (1) describe initiatives that have been implemented in municipalities across Canada to increase the affordability of public transit; (2) outline the process these municipalities used to implement these initiatives (including enabling factors and challenges); and (3) discuss the elements of successful initiatives. The report will be used to inform discussion about options to increase the affordability of public transit in Toronto for people living on a low income.

Research Methods

Internet searches using keywords such as low income, affordable, subsidized, and reduced; transit, and bus; and pass, and program, were conducted to identify communities across Canada that had implemented or were implementing initiatives to increase the affordability of public transit for people living on a low income. The twenty four communities that comprise the Federation of Canadian Municipalities' Quality of Life Reporting System (Federation of Canadian Municipalities, 2011) were examined for possible programs. The initiatives identified through this process are listed in Appendix 2.

Seven discount transit initiatives were selected for closer examination in consultation with Toronto Public Health. Selections include communities with well-established and new discount transit pass programs, initiatives with a history of strong advocacy, and/or initiatives that are well documented. Consideration was also given to how comparable certain aspects of the jurisdiction were to Toronto; however, the two Canadian cities considered to have similar socio-demographic characteristics to Toronto – Montreal and

Vancouver do not have transit programs targeted specifically toward people with low incomes.¹ Note, however, that the provincial BC Bus Pass program described in this report provides deeply discounted passes to seniors and people with disabilities that also have low incomes in Vancouver.

Information about the affordable transit programs was collected through interviews with key informants and review of documents. Key documents were identified by web searches, key informants, and Toronto Public Health staff. Eighteen key informants across the seven jurisdictions were interviewed (Appendix 1). Interviews were primarily conducted by telephone – although a few people responded to questions through email – between December 8 and 20, 2011. Although attempts were made to speak with people in government social service departments and transit authorities as well as community organizations, the project had a short time-frame and reaching people from each of these sectors was not possible in all cases.

Program identification primarily depended on some evidence of the program being available online. In some cases, discount fares are noted on transit authority websites; however, in many cases – especially when marketing campaigns are focused – programs may not be broadly advertised. In those cases, programs were identified through municipal reports which proposed their establishment or changes to already-existing programs.

Report Structure

The report is divided into three sections. The first section presents profiles of discount public transit initiatives specifically targeted to people living on a low income as well as very brief profiles of two provincial programs.

The second section provides a brief summary of other types of subsidies and services that are available, including many that do not involve public transit.

The third section compares and contrasts the discount transit pass programs from the seven municipal jurisdictions, drawing attention to challenges and the variety of successful responses used to address them. Common themes and features are discussed, as are differences in approaches to program establishment, funding, and operation. Where available, program impacts are discussed.

A list of all programs is provided in Appendix 2, which includes two tables listing brief details on discount transit pass programs; one table listing discount pass programs directed towards seniors, children and people with disabilities; and one table listing discount transit ticket programs.

¹ In addition to searching for relevant information online, these municipalities' transit and social service departments were contacted for information with respect to affordable pass programs.



Profiles: Discount transit pass programs

Several Canadian jurisdictions have implemented discount fare initiatives to increase the affordability of public transit for people with low incomes. Discount transit pass programs from seven communities are profiled in this section. The profiles are presented in order from oldest to newest program: Region of Waterloo (established in 2002), City of Calgary (2005), City of Hamilton (2008), City of Kingston (2009), City of Windsor (2011), Region of York (2012), and City of Guelph (2012).² Discount transit ticket programs are also briefly explored.

The profiles include the following information: how the program was established, funding, operation, impact, challenges and factors that contributed to success.

Region of Waterloo

In brief: The Regional Municipality of Waterloo initiated an affordable transit pass program – TRIP (Transit for Reduced Income Program) – in 2002. Registrants in the program can purchase a monthly pass for regular transit service at a 44% discount (in December 2011, it was \$35 compared to \$63 for an adult pass). Application is an honour-based process managed through two community agencies. Eligibility is based solely on income – using before-tax LICO as the eligibility criteria, thus people that are working and people in receipt of OW/ODSP are eligible.

The program is fully subscribed, with over 2000 registrants who purchase approximately 1500 passes per month. The program has a substantial waiting list – roughly 1000 people as of December 2011. The long waiting list precipitated a recommendation to Regional Council to increase the funds allocated to the program. Council approved the recommendation early in 2012 and TRIP's annual budget is now \$746,000.

The Region also has a discount transit ticket program that was initiated at the same time as TRIP. Community agencies providing social and educational services can purchase bus tickets at the same reduced price that is available to seniors/students. Agencies then give tickets to their clientele for free for a range of purposes such as employment searches, trips to the food bank, medical or counseling appointments and volunteer commitments.

A new program was initiated as a pilot in 2010 and is now a regular program. The Transit Assistance Pass Program (TAPP) provides free monthly passes to recipients of OW that meet specific, education-related criteria.

Establishment

In 2001, following expressions of concern from the community, Regional staff prepared a report to Council proposing a **work plan** to address transit affordability and accessibility issues (Regional Municipality of Waterloo, 2001a). Issues had been raised by a diversity of groups advocating for more affordable transit fares for people with low-incomes, increased physical accessibility to transit services, and improved transit service levels, especially to workplaces and other important destinations. With

² These are the dates when passes were/will be first sold, not when approval was given or when interest in the program first arose. In many cases efforts to establish the program and/or its approval happened much earlier.

Council approval, staff from Transportation Planning, Transit Services, and Employment and Income Support worked together to consider possible approaches for addressing needs.

Following a combination of focus group discussions and public consultation, **two recommendations** were made (Regional Municipality of Waterloo, 2001b): 1) to provide discounts to community agencies that were already purchasing tickets for their patrons; and, 2) to investigate options for providing discounts to people with low incomes, including those who are working and those in receipt of social assistance (who do not qualify for other transportation subsidies). The **ticket program** began near the end of 2001, allowing some community social service and educational agencies to purchase adult tickets at the reduced rate provided to seniors/students (in December 2011, \$8.25 for a book of five tickets rather than \$9.25, an 11% discount). This was funded through Grand River Transit, with the expectation that community agencies would maintain their level of spending, simply increasing the number of tickets purchased. A few months later, the list of eligible agencies was increased. The ticket program is still in existence, with the number of community agencies further expanded.

The second recommendation required further development in order to resolve the operational and administrative issues involved in implementing the proposal. In early 2002, development of a **transit pass program (TRIP)** was recommended (Regional Municipality of Waterloo, 2002), in which people with incomes below (before-tax) LICO would be eligible for a discounted pass. The proposal was developed collaboratively by Transportation Planning, Grand River Transit, and Employment and Income Support, as well as two community agencies – The Working Centre and Lutherwood. The latter agencies were already serving the target population and both agreed to administer the application process, seeing TRIP as complementary to the services they already offered.

The third program operating in the Region of Waterloo is much more recent, starting as a pilot in late 2010 (Regional Municipality of Waterloo, 2010) and now established as a regular program (Dirks, Personal communication). This program grew out of a study carried out in 2008 (Dempster, 2009; Dempster and Tucs, 2009) that explored ways of increasing affordable access to transportation (beyond the two initiatives noted above) – an objective within the Region’s strategic plan. Focus group discussions and consultations with key informants identified and prioritized a range of transportation options. One of the suggestions was to provide free transit passes to recipients of OW. Recognizing that providing passes to *all* recipients would be prohibitive, the TRIP committee recommended a pilot that focused on recipients of OW who were upgrading their education or enrolled in English as a Second Language programs. The initial **Transit Assistance Pass Program (TAPP)** pilot targeted 100 people. The program has since been considered a success and is now serving approximately 300-400 people.

Funding

TRIP funds are allocated to Social Services (Employment and Income Support – the department that administers social assistance) and come from the municipal tax levy and the gas tax revenue allocated to municipalities. Payment is made to Grand River Transit based on the actual number of passes sold. The 2011 budget was \$441,000. Regional Council just approved an increase, bringing the total budget for 2012 to \$746,000 (Dirks, personal communication). This amount does not include administration costs, which are covered by program partners: Region of Waterloo’s Employment and Income Support (general administration), Transportation Planning (usage, projections), Grand River Transit (marketing, sales), and two community agencies, The Working Centre and Lutherwood (application, renewal).

Initial funding for the TRIP program came from an existing \$200,000 transportation allocation in the Social Services budget. (This funding had been allocated with the intention of appealing to the province for transportation support on a cost-sharing basis; however, the province was not forthcoming. This left the funds available for allocation to this new program.)

Funding for the **transit ticket program** is shared between Grand River Transit – which covers the subsidy for some of the original agencies – and Social Services, which covers the remaining agencies. Of

course, the bulk of the cost of this program is covered by the community agencies that purchase the tickets, thus contributing approximately 95%.

Funding for the initial **TAPP** pilot (Sept 2010 - June 2011) came from the Provincial Enhanced Employment Services for Vulnerable Persons Initiative (Regional Municipality of Waterloo, 2010). Now that it is an ongoing program, funds come from the regular Social Services budget (Dirks, personal communication). The total amount varies according to the number of people in the program, but is expected to average around \$300,000/year. TAPP purchases passes from GRT at the corporate pass rate (a 14% discount).

Operation

The **application for TRIP** is an honour-based process managed by two community based agencies – one in each of the two urban areas in the Region. Those interested in obtaining a pass – which can include people that are working as well as people in receipt of OW/ODSP, or with other sources of income – can complete an application at either agency. Assistance from staff in completing the applications is available, if required. Whether applicants provide proof of income is left to the discretion of agency staff who regularly work with people with low incomes and – in some cases – may be well acquainted with them. The program strives to maintain a ratio of 40% employed and 60% unemployed, although the ratio is allowed to vary. Registrants receive a sticker on the back of their transit identification card. The sticker enables them to buy a regular adult pass at the discounted price from either of the two main bus terminals. Stickers are valid for one year and fit into one of four renewal periods ending in April, June, September and December.

Initially, the discounted price for the pass was equivalent to the reduced price for seniors/students – a \$10 discount at that time. The discount was increased to \$20 after the six-month review due to slow uptake and the recognition that, for many, the discounted price was still too high. TRIP – which had initially been restricted to people that were employed – was also expanded to include people in receipt of OW/ODSP (not receiving other transportation subsidies). Over the years, the discount has increased in small increments (typically at times when there were fare increases). Effective July 1, 2012, the adult monthly TRIP pass will cost \$38.00 – a discount of \$30.

TRIP has an **advisory committee**, comprised of those involved in management and administration of the program – an approach that key informants unanimously pointed to as very important to the success of the program. Meetings occur every 1-2 months, depending on need, and provide partners an opportunity to keep in touch with each other around program operation and make or recommend changes deemed advantageous. For example, through regular review of application numbers, the committee decided that a concerted effort should be made to advertise the program to working people with low incomes. One of the initial intentions of the program was to provide support to people with low incomes, given that they were not likely to be receiving other kinds of support – yet they were not taking advantage of TRIP. The committee decided on the 40%-60% ratio noted above. Partners undertook a focused advertising campaign that successfully increased the number of working people registered in the program.

In 2007, the committee decided to document the operating principles and procedures, which is updated roughly every two years (Regional Municipality of Waterloo -TRIP 2010). Those involved in the program have found it helpful for keeping track of operating procedures and for introducing new staff to the program.

The committee also provides a forum for discussion of other transportation-related issues and concerns, which has led to the development of additional research and discussion on affordable transportation such as the 2008 study mentioned below, which led to establishment of TAPP and may lead to other initiatives.

The **transit ticket program** is managed by Grand River Transit, Social Services, and community agencies. The latter buy the reduced-price tickets and distribute them to patrons free of charge. Eligibility

is at the discretion of the agencies, with tickets provided for a range of purposes, including employment searches, trips to the food bank, medical or counseling appointments, and volunteer commitments, among others. In most cases, community agencies report that there is greater need than they can afford to cover. Managing patron expectations is a challenging aspect of the program.

TAPP is managed by Social Services. Participants are approved by caseworkers using regular processing procedures. To be eligible, a person must be a recipient of Ontario Works who is upgrading their education, either as an adult completing their high school diploma or enrolled in an English as a Second Language program.

Some **challenges, key strategies, and successes** have already been noted. Among these, key informants emphasized the importance of partnerships; that the program benefits from having multiple partners who each bring their expertise and requirements to the table. For community partners, it is important that the program complement their work and mandates. Explaining the pass program and processing applications integrates well with the employment services they provide to patrons. Further, TRIP supports agency clients in their employment or employment search.

Informants also pointed to the value of having the same committee members over a number of years. Other factors that were noted as important to the establishment and operation of the program include: finding the right ‘formula’ (price vs. number of passes); recognizing the importance of accessibility/availability as well as affordability; recognizing the strengths and constraints of partners involved in the program as well as the importance of revenue from the fare box for the transit system; the simplicity of the application process as well as the efforts made to keep the program respectful of patrons, including efforts made to minimize potential stigmatization; and the research that has been undertaken, which has helped raise awareness regarding the importance of transportation for people with low incomes.

Among the challenges partners faced is **how to deal with the success** of the program. In particular, the two agencies handling the application process have had to manage increasing numbers of people interested in the program. Long waiting lists are a strong indicator of the success of the program, and of a yet to be met need. As one informant suggested with respect to any affordable transit program, it *will* be successful – and the primary challenge will be in dealing with that success.

With respect to the **transit ticket program**, key informants noted it as serving a need, but saw the transit pass program as much preferred. One respondent noted tickets as “crazy-making” since they involve difficult conversations and decisions: those requesting tickets have to explain – again and again – their circumstances. Community/municipal staff are left to decide – also repeatedly – who does/does not get a ticket and for what purpose. Each of these discussions consumes time and energy, and can be emotionally taxing.

Impact

In 2004, an evaluation of the transit pass and ticket programs was undertaken (Tucs et al. 2004). To assess the effectiveness of the program and to gather general impressions on issues associated with the affordability of transportation, open-ended interviews were held with those making use of the program and other people with low incomes (68 total, including 16 in three focus groups), and staff from relevant community agencies (11 interviews, 15 email questionnaires). Results showed that the program was well received:

- Almost all respondents saw public transit as vital, very important, or something that was relied upon heavily.
- All respondents said both programs were effective. However, many also made qualifications, noting that passes were still unaffordable, availability of passes/tickets was limited, eligibility

criteria excluded many that need assistance, and transit service was not always accessible or available. Other concerns were also raised.

- All patron respondents thought the bus pass program was helpful, although roughly half said affordability was still a challenge, and some noted other concerns including: a lack of awareness of the program or clarity around its operation; long waiting lists and consequently limited availability; challenging application; and purchasing procedures (e.g. locations).
- Community agency respondents were mixed in their opinion of how helpful the program was. Roughly half said it was helpful in at least some ways, for example, by making transit more affordable and improving freedom and mobility. Slightly more than half said it was not particularly helpful, noting that passes were still unaffordable and unavailable.
- Most patron respondents saw the ticket program as helpful, although concerns were noted regarding availability, accessibility (where they could get tickets) and eligibility (e.g., could only get tickets for particular uses from particular places).
- Community agency respondents were again more mixed in their responses regarding the ticket program. On the positive side, tickets offered the same benefits as passes, although not to the same degree. Also, in offering tickets, agencies could stretch their budgets a bit further. Many respondents also pointed to challenges: many who need a ticket are unable to access participating agencies, many find that tickets, which offer the benefit of only single fares, do not adequately meet their more regular transportation needs, and not enough tickets are available.
- Patrons also drew attention to the transit service. Most aired their appreciation for the service, but concerns were also raised. Most notably, routes/schedules did not always meet needs, the behavior of other patrons and sometimes drivers lacked sensitivity, infrastructure and its upkeep at times presented difficulties.

Although the report has few numbers, there are many examples and qualitative responses that provide a rich picture of transit-related challenges and program benefits. In addition to many specific recommendations, the report made four over-riding recommendations:

- Increase support for the discount bus pass and discount ticket programs to further improve affordability and accessibility of public transit for people with low incomes.
- Continue efforts to improve service, with particular attention to diversity and to the needs of people who rely heavily on public transit.
- Facilitate greater community involvement, specifically including low income patrons in the design, planning and implementation of public transit and the discount programs.
- Consider particular areas for further consultation and research, notably the needs of the working poor and strategic consideration of related programs.

The evaluation provided support for a request to increase TRIP funding, which was approved. Further increases were approved in subsequent years, leading from the initial \$200,000 in 2002 to \$746,000 ten years later.

Information Sources

The following sources were used in the development of this profile. Only those providing unique or specific information are cited in the text.

Dempster, B. & Tucs, E. (2009). *Increasing Affordable Transportation Options in the Region of Waterloo: A Selection of Options*. Civics Research Co-operative.
http://civics.ca/docs/afftrans_consult_report.pdf

Dempster, B. (2009). *Investigating Affordable Transportation Options in the Region of Waterloo with a Focus on Public Transit*. Civics Research Co-operative.
http://civics.ca/docs/afftrans_investigate.pdf

- Dempster, Beth. (2011, December). Civics Research Co-operative and TRIP Committee member. Personal communication.
- Dirks, David. (2011, December). Waterloo Region Employment and Income Support and TRIP Committee member. Personal communication.
- Regional Municipality of Waterloo (RMOW). (2001a, June). *Transit Affordability and Accessibility* (Report No: P-01-085/SS-01-035).
- Regional Municipality of Waterloo (RMOW). (2001b, November). *Transit Affordability and Accessibility* (Report No: P-01-145/SS-01-073).
- Regional Municipality of Waterloo (RMOW). (2002, March). *Transit Affordability and Accessibility* (Report No: P-02-023/SS-02-023).
- Regional Municipality of Waterloo (RMOW). (2010, Sept). *Affordable Transportation Pilot* (Report No: SS-10-044).
<http://www.regionofwaterloo.ca/en/regionalGovernment/resources/SA2010-0907.pdf>
- Regional Municipality of Waterloo, TRIP Committee (RMOW-TRIP). (2010). *Waterloo Region's Transit for Reduced Incomes Program (TRIP): Operating Principles and Procedures of the Waterloo Region Discount Bus Pass Program*, Region of Waterloo/Civics Research Co-operative. [Copies of this document are available from members of the TRIP Committee.]
- Roberts, Sandy. (2011, December). Grand River Transit and TRIP Committee member. Personal communication.
- Spencer, Jason. (2011, December). The Working Centre and TRIP Committee member. Personal communication.
- Springate, Erica. (2011, December). Waterloo Region Transportation Planning and TRIP Committee member. Personal communication.
- Tucs, E, Dempster, B. & Franklin, C. (2004). *Transit Affordability: A Study Focused on Persons with Low Incomes in the Region of Waterloo*, Civics Research Co-operative/Region of Waterloo.
<http://civics.ca/docs/transitaffordabilityreport.pdf>

City of Calgary

In brief: Calgary's Low-Income Transit Pass (LITP) started as a pilot project in 2005 and became a permanent program in 2008. All residents of Calgary, age 18-64 years, who meets the low income criteria – under 75% of before-tax LICO – can register for the program by providing proof of income (e.g. Income Tax Notice of Assessment or receipt of Assured Income for the Severely Handicapped). Registrants, which include recipients of social assistance, can purchase a transit pass at a 57% discount (\$40 instead of the regular adult pass which is \$94) at any one of four locations by showing their confirmation letter.

The program is operated by Calgary Transit with an expected expense of approximately \$2 million annually.

Calgary Transit also offers a deeply discounted pass for seniors. Seniors can purchase an annual pass for \$35, a 97% discount from the regular adult pass. Further, seniors with a low income can purchase a pass for \$15 annually.

The municipality also has a transit ticket program where community agencies can purchase tickets at a discount. Community agencies pass tickets on to low income patrons at their discretion (e.g., for finding employment, attending medical/counseling sessions, volunteer placements, etc.). Discussion with key informants focused on establishment of the transit pass program, so no further details on the ticket program are provided here.

Establishment

As early as 1998, community activists and city staff started collaborating around concerns regarding transit affordability. The Calgary Committee for Discounted Transit Passes, established from this collaboration, was initially focused on people with disabilities, and gradually expanded its focus in recognition that transportation was also an issue for people with low incomes. The committee drew in more members from the community and started collaborating with other groups, such as Disability Action Hall. At the time, Disability Action Hall advocated for the rights and benefits of people with disabilities.

During the lead up to elections in 2004 (both provincial and municipal), barriers faced by persons with disabilities (including and especially transportation-related barriers) received a considerable amount of coverage. That coverage heightened public awareness of the challenges people with disabilities faced. At the time Calgary had been experiencing rapid growth, and there was increasing interest and concern over the “triple bottom line” – economic, environmental and social - impacts. For example, in 2004, the City's transit plan had a chapter dealing with social issues and the Community Services department had initiated a policy to consider whether service provision was equitable and fair. This is now a city-wide initiative, referred to as the Fair Calgary Policy.

The Calgary Committee for Discounted Transit Passes was renamed Fair Fares. The change in name reflected a more focused mandate that was also complementary to the City's fair policy work. A key part of the Fair Fares strategy was to lobby the province to subsidize transit. (This approach was later supported by City Council.) At the same time, Fair Fares lobbied the City. Key informants emphasized the importance of gathering stories from transit users and people with low incomes and sharing them with provincial representatives, city staff and city councilors, noting that such stories have been especially powerful in helping people understand the challenges experienced by low income people in accessing affordable transit. In 2005, the province agreed to fund a subsidized fare transit program, but only for

recipients of Alberta's Assured Income for the Severely Handicapped (AISH) program. Shortly afterwards, Calgary Council voted to support a program for people with low incomes. This program, the Low-Income Transit Pass (LITP) program, subsequently replaced the provincial program, which was discontinued.

In 2008, through the combined efforts of Calgary Transit staff, city councilors, city administrators and members of the Fair Fares group, the LITP program became permanent, operating under the budget of Calgary Transit. At that time there were 10,000 registrants in the program (although there were an estimated 35,000 persons eligible for the program). Registrants purchased an average of about 5000 passes per month.

Some of the challenges and success in establishing Calgary's LITP program have been noted above. Community key informants strongly emphasized the importance of advocacy. They emphasized the significant impact that people with low incomes – the potential users of the program – had in helping councilors and staff understand the importance of the program. Personal stories helped those who had little experience with living on a low income appreciate the importance of transportation and how much of a barrier regular prices were. Community informants also noted that their long term commitment to advocating for affordable transportation has been an important element in establishing affordable fare programs. It took many years of work before the program was established.

Funding

With approval of the transit pass program, city transit staff started addressing its **logistical and financial challenges**. These included establishing a benchmark for eligibility: How would people qualify for the program? Subsequent to this: How would the City's cost vary with different criteria – and different pass prices? Two studies were done. One study assessed costs, most notably, to consider how many people would switch from a regular pass to a low-income pass. The other study determined the most appropriate fee for the pass from the perspective of potential clients. Results from these studies led to setting the price at half the regular adult pass and to making the eligibility criteria under 75% of before-tax LICO. The expected cost of the transit fare program was \$2 million. While advocates would still prefer to see 100% of the pass covered for people with incomes at 100% of LICO, they applauded the City and Calgary Transit for initiating the program.

Over the first few years of operation, the **cost of the program** was covered by an anticipated surplus in the Calgary Transit budget. [This does not mean the transit system was generating a positive revenue, rather that the combined income from revenues and the budgeted allotment to the program from municipal taxes, left a surplus.] Over this time, continuation of the program was reliant on a continued surplus. In 2008, when the LITP program was approved as an ongoing program, costs continued to be funded through the tax levy, allotted to Calgary Transit. The seniors pass programs are funded in the same way.

Operation

In establishing the program, one concern noted by Calgary Transit staff, was the potential for fraud. **Procedures** were developed whereby patrons could obtain a pass without too much difficulty, but without risk of fraud. For example, whereas regular passes are transferrable, LITP passes are not so LITP passes have patrons' names on them, enabling transit staff to check pass validity. Further, registrants' names are maintained in a database to enable monitoring of monthly purchases by name.

Applications for an LITP pass are accepted at the main transit office. Applicants have to be Calgary residents with a household income under 75% of the before-tax LICO. Applicants must provide an Income Tax Notice of Assessment for all family members 18+ in the household with their application. Applicants who are recipients of AISH can provide a Health Benefits stub or a current copy of an official

letter stating their eligibility. Patrons receive a confirmation letter, which they then use to purchase a pass at any one of four locations. AISH patrons do not have to reapply to the program, but others have to do so annually. LITP passes are also valid for Access Calgary (specialized transport for people with disabilities). Patrons registered with Access Calgary may submit applications and purchase passes through the mail.

Low-priced annual passes for seniors and for seniors with a low income have been available for many years. The \$35 price for the regular seniors pass has not increased for several years, primarily because it is seen as a political ‘hot-potato’. Some have argued that it should be increased for seniors who can afford it, with the increase in revenue applied to the low income programs (Dempster 2009). Recent discussion indicates that the regular price senior’s pass may be increased to \$55, annually, leaving the low income senior’s pass at its current price.

To be eligible for the low income seniors pass, a seniors’ income must be below 83% of before-tax LICO if they are single and 101% of before-tax LICO if they are part of a couple.

As with the LITP, both senior’s passes must be renewed annually, although they are available for a fixed period (or portion thereof): July 1 to June 30. Application can be made at the main transit office or through the mail.

The Fair Fares group, noted above as instrumental in establishment of the program continues to play a role in an advisory capacity. Membership of the group includes representatives from community groups as well as city staff. The group provides a forum for ongoing discussion relevant to the LITP program and other transit-related concerns.

Impact

In 2007, the City and Fair Fares (now working as an Action Team under Vibrant Communities) collaborated on a telephone survey of patrons (n=401) to assess the program impacts (HarGroup 2007). The responses were strongly positive.

- Ninety-nine percent of respondents agreed that the pass was useful to them and 97% agreed that life was better with a pass.
- When asked about benefits, 55% pointed to financial benefits (e.g. could save money for other things), 35% to increased mobility, 8% to general assistance, 5% to reduced stress. Only 2% said the pass hadn’t helped.
- Further, 90% agreed with the statement that, with the pass, they had more money to buy things, 62% that they visited family and friends more often, 60% that they went to medical appointments more often, 59% that they were able to keep a job, 55% that they took more training/education classes, 49% that they found employment/better employment, and 48% that they volunteered more often.
- Regarding the impact of *not* having a pass, 48% pointed to negative financial implications, 33% to decreased mobility, 8% to general hardship, 7% to other reasons and 5% said it would have little/no effect.
- The survey also provided information on why patrons did not purchase a pass every month, weekly transit use, and types of trips taken, sometimes comparing users with/without a pass.
- In addition, the study indicated that about 56% of respondents had previously bought a regular pass, 25% had purchased books of tickets, and new patrons only accounted for about 10%.

This last piece of information confirmed the revenue loss that was projected by Calgary Transit. The survey responses were helpful in advocating for permanency of the program.

Community groups continue to **advocate for improvements** to the program. For example, there is continuing concern that 75% LICO is too low an eligibility criteria, and that the price of the pass is too high for people with such low incomes. It is noteworthy that the price for a low-income pass was reduced

in 2011. The original policy set the price at 50% of the regular adult monthly pass; it now costs 43% of the regular pass. The cost still seems high to many people.

Some of the improvement ideas are currently being investigated by staff, with the intention of presenting them to Council early in 2012. In addition, city staff working on the Fair Calgary initiative are developing common income and benefit criteria for several City programs that offer subsidies to people with low incomes or specific age groups. The result of this initiative may have significant implications for the transit programs. (For example, other programs use 100% rather than 75% of LICO as the eligibility criterion, which could increase enrolment in the low income transit pass program.)

Information Sources

The following sources were used in the development of this profile. Only those providing unique or specific information are cited in the text.

- Calgary Transit. (n.d.). Low Income Transit Pass webpage.
http://www.calgarytransit.com/html/low_monthly_income_pass.html
- Calgary Transit. (n.d.). Seniors Transit Pass webpage.
http://www.calgarytransit.com/html/senior_yearly_passes.html
- Dempster, B. (2009). *Increasing Transportation Affordability in Waterloo Region: A List of Discounts, Programs and Services*. Civics Research Co-operative.
http://civics.ca/docs/afftrans_investigate.pdf
- HarGroup Management Consultants. (2007). *Low Income Transit Pass Outcomes Survey*. Calgary Transit/Vibrant Communities Calgary.
<http://www.vibrantcalgary.com/uploads/pdfs/low-income-transit-pass-outcomes-survey-final-report-august-18-2007.pdf>
- Houston, Colleen. (2011, December). Disability Action Hall, Calgary. Personal communication.
- Makhoul, A. (2005). *Fair Fares Calgary Celebrates Reduced Fare Transit Passes*. Caledon Institute of Social Policy.
<http://www.caledoninst.org/Publications/PDF/557ENG.pdf>
- Makhoul, A. (2008). *Fair Fares 2008: Roadblocks and Opportunities*. Caledon Institute of Social Policy.
<http://www.vibrantcalgary.com/uploads/pdfs/fair-fares-2008.pdf>
- Makhoul, A. (2009). *Success for Fair Fares*. Caledon Institute of Social Policy.
<http://www.vibrantcalgary.com/uploads/pdfs/calgary-fair-fares-2009.pdf>
- Pacaud, Bonnie. (2011, December). Fair Fares, Calgary. Personal communication.
- Vibrant Communities Calgary. (2007). *Fair Fares Strategy Update*.
<http://www.vibrantcalgary.com/uploads/pdfs/fair-faresstrategyupdatejan2007.pdf>
- Wilson, Terry. (2012, January). Fair Calgary, City of Calgary. Personal communication.

City of Hamilton

In brief: Since 2008, Hamilton has had an Affordable Transit Pass (ATP) program that enables working residents with a low income to purchase an adult transit pass for half price (in December 2011, \$43.50 instead of \$87). Applicants with low incomes are assessed according to after-tax LICO. Registrants must be working full-time, part-time or casual (but not self-employed). Recipients of OW and ODSP who are working are also eligible for the pass. Approval letters are valid for six months.

The original pilot has been extended a number of times, most recently to the end of 2013. Program funds are allocated to the Community Services Department and are drawn from a special reserve fund (covered by municipal taxes) with an additional contribution from the province. The total budget for 2012 is \$403,000, including administrative costs. The provincial contribution (OMCSS) is approximately \$103,000.

There is also an annual seniors transit pass that provides a significant discount (\$205 annually), and a low-income seniors pass available free of charge; however, the focus of the following profile is the ATP program.

Establishment

Although not the first time affordable transportation issues were on the agenda, a fare increase proposed for 2007 raised concerns among Council members, city staff and the community over the negative impact higher fares would have on people with low incomes. To respond to those concerns, a report prepared by city staff from the Community Services Department, outlining **the possibility of an Affordable Transit Pass Program**, was presented to City Council in 2007 (City of Hamilton, 2007). At the time, the City offered a fairly typical selection of transit subsidies (e.g., seniors, students, OW medical transport). The report noted Hamilton's 'significant' rate of poverty (1 in 5 residents were below LICO) and drew attention to "*Starting Point Strategies*" – the City's framework for reducing poverty (Hamilton Roundtable for Poverty Reduction, 2007) which included accessible and reliable transportation as a 'basic foundational community support'.

The report to council presented a few scenarios, suggesting that low income people who are working – who do not receive any other form of subsidy – be the focus of a **pilot project**. The pilot proceeded as recommended, expecting to run until March 2009. In the first few months of operation, only a fraction of the available passes were sold. A communications strategy was developed in partnership with other municipal departments. The eligibility criteria were also expanded to include recipients of OW and ODSP who were also working. The latter change was in response to the six-month evaluation (described below) and community led advocacy, which included a number of deputations before Council.

Funding

The initial report (City of Hamilton, 2007) that recommended the pilot suggested that \$500,000 be drawn from the **Social Services Initiative Reserve** to fund a one-year pilot project. The initial budget included allocations for staffing (up to \$105,000 for a special case aid in community services and a ticket sales agent), assistance with communication needs (up to \$25,000), and program evaluation (up to \$25,000).

The program experienced a slow start-up, however, so the **pilot was extended** to the end of December 2009 (City of Hamilton 2008). In addition, inclusion of OW/ODSP recipients meant that there could be

cost-sharing with the province for the subsidy to OW/ODSP patrons on an 80%-20% ratio (province-municipality). By late 2009, administrators estimated that the program funds could extend the program into 2010 and, with an additional one-time allotment of \$200,000; the program could be continued to April 2011 (City of Hamilton 2009). By doing a program review in April 2011 (rather than earlier) there would be no program disruption during 2011 budget talks. A proposal to make the ATP program more permanent was tabled at those budget talks. The proposal was successful, although the program is still being funded out of the Social Services Initiative Reserve until December 31, 2013 (Bian, Personal communication).

For 2012, **the ATP budget is approximately \$403,000**, including administrative costs (Brimley, Bian, Personal communication). The bulk of the budget is allocated to the Community Services Department for passes: \$261,000 (500 passes). The total amount includes a provincial contribution of approximately \$103,000. The latter provides \$64,800 for passes (calculated as an 81.2% subsidy on 150 passes) and covers half of the administrative costs in the Community Services Department (\$36,300 towards staff and \$1800 towards other administration costs). The program budget also includes approximately \$65,000 allocated to Public Works – Hamilton Street Railway for a ticket agent and other administration costs. While no additional staff has been required to date, the projection of continued gradual increases in registration could require the hiring of staff in both Community Services Ontario Works Special Supports (case aid) and Public Works –Transit Department (ticket sales) for the duration of the pilot.

Operation

To be **eligible for the program**, a person must be a Hamilton resident working full-time, part-time or casual, but not self-employed. (Hamilton Street Railway, n.d.), with a family income that falls below (after-tax) LICO or they must be a recipient of OW or ODSP who is not receiving other transportation subsidies (e.g. for medical transport). People who qualify for student or senior fares are not eligible. Provision of an Income Tax Notice of Assessment and four weeks' pay stubs are required with applications. **Applications** can be made through a case aid in the Community Services Department. Approval letters are valid for six months. Patrons can purchase passes at the main Hamilton Street Railway (HSR) ticket office by showing their approval letter from the Community Services Department. Letters are signed each time a pass is purchased to prevent anyone from purchasing additional passes. City of Hamilton approves an average of approximately 600 applicants; however, only 483 people, on average, actually purchase passes each month (Bian, Personal communication). The program has a capacity for 500 monthly passes, but has not quite reached this limit. When it reaches capacity, the ATP program will operate on a first-come, first-served basis.

Although not specifically involved in the program, **a community based poverty group provides feedback** and suggestions on the program and members of the Public Works department are consulted occasionally with respect to program operation.

Impact

Six months into the program there was a telephone survey (n=94) to evaluate the program (City of Hamilton 2008). Most respondents relied on public transit both before (92%) (n=86) and after (97%) (n=89) registering in the program. Prior to being in the program, 48% (n=46) of respondents regularly purchased a bus pass. Of those who didn't, 47% most commonly used tickets and day passes, 23% (n=23) bought a bus pass but not regularly, 20% relied on family/friends and 9% (n=5) used a car. Regarding improvements in quality of life from having a pass, 97% (n=89) of respondents agreed that it has helped them feel more independent; 95% (n=83) that it was easier for them to get to work; 91% (n=89) that the program made a difference in their family budget; 87% (n=81) that the pass has helped

them maintain a connection with family and friends; and 73% (n=66) that they would not have been able to purchase a transit pass without the discount.

- When asked about administrative aspects of the program (e.g. application form, city staff), responses were very positive, although applicants said they would prefer something other than the single downtown point of sale.
- Regarding changes to the program, 62% *disagreed* with the statement “Reduce the amount we pay for the pass, 50% [discount] is not enough to help”. Roughly 77% agreed that people on OW and ODSP should be able to use the program and 74% agreed that the transit passes should be used with photo id to cut down on fraud.
- The final question of the survey asked people if they had anything else they wanted to say. All responses were positive, for example: “It makes a big difference at the end of the month.” “It’s really helped me a lot, it makes my life easy cause I am a single mother, I can now buy groceries.” “It’s a good idea you find more people using the bus.”
- The report also provides demographic data, an indication of what people used passes for, how they learned about the program and other details.

The results from the survey strongly supported continuation of the program, as well as its expansion to include recipients of OW/ODSP who are working.

Information Sources

The following sources were used in the development of this profile. Only those providing unique or specific information are cited in the text.

- Bian, C. (2008, October). *City of Hamilton Affordable Transit Pass Program Six Month Pilot Evaluation*. Community Services Department, City of Hamilton. <http://www.hamilton.ca/NR/rdonlyres/AA0F43CA-9FFB-4935-BFA3-IDC654324E1A/0/Nov14ECS08051REPORTAffordableTransit.pdf>
- Bian, Carmen. (2012, January). Community Services, City of Hamilton. Personal communication.
- Brimley, Erica. (2012, January). Community Services, City of Hamilton. Personal communication.
- City of Hamilton. (2007, November). *Affordable Transit Pass Program - Pilot Project [Report to Council]*. <http://www.hamilton.ca/NR/rdonlyres/D04841BA-536A-4E5C-844F-6D399AB80E23/0/Nov26Affordable Transit REVISED Nov23 20071.pdf>
- City of Hamilton. (2008, October). *Affordable Transit Pass Pilot Program – Six Month Program Evaluation Results [Report to Council]*. <http://www.hamilton.ca/NR/rdonlyres/AA0F43CA-9FFB-4935-BFA3-IDC654324E1A/0/Nov14ECS08051REPORTAffordableTransit.pdf>
- City of Hamilton (2009, October). *Affordable Transit Pass 2009 Program Update [Report to Council]*. <http://www.hamilton.ca/NR/rdonlyres/2D954943-6802-407F-9638-2CB1F72C7FE6/0/Oct29Item81.pdf>
- City of Hamilton. (2010, December). *Affordable Transit Pass Pilot Program - Change in Status from Pilot to Permanent Program [Report to Council]*. http://www.hamilton.ca/NR/rdonlyres/D6D768E4-C67F-4FC0-94AC-E329A7A9D257/0/Dec14EDRMS_n101913_v17_4_CS10071aPW10100_Affordable_Transit_Pass_Pilot_Program.pdf
- Kerr, Colin. (2011, December). Hamilton Street Railway, City of Hamilton. Personal communication.
- Hamilton Roundtable for Poverty Reduction (HRPR). (2007, February). *Making Hamilton the Best Place to Raise a Child: Hamilton Roundtable for Poverty Reduction ~ Starting Point Strategies*. <http://www.hamiltonpoverty.ca/docs/Starting%20Point%20Strategies.pdf>
- Hamilton Street Railway. (n.d.) Fares and Conditions webpage. <http://www.hamilton.ca/CityServices/Transit/Fares+and+Conditions/FaresandConditions.htm>

City of Kingston

In brief: The Affordable Transit Pass (ATP) program was launched at the end of 2009, approximately one year after first conceived. The program provides a 32% discount off the price of a monthly transit pass for residents of Kingston, inclusive of adults, children and youth, and seniors in low income households, and OW or ODSP recipients, as measured by the after-tax LICO (reducing passes to \$46.50, \$34.25 and \$31.50 respectively from \$68.25, \$50.50 and \$46.25). The ATP program is part of the Municipal Fee Assistance Program (MFAP), which also provides discounts for recreational facilities/programs through the same application process, using the same eligibility criteria.

Program administration is covered by the Community and Family Services Department; other costs are managed by Kingston Transit. Program expenses in 2010 were \$165,000 instead of the estimated \$108,000 and are covered by the municipal tax levy.

Establishment

In late 2007, Council accepted a recommendation from the Mayor's Task Force on Poverty to increase the accessibility of Kingston's recreational programs for people and families with low incomes. At the time, **poverty was a priority concern** for council, as it was for the province. A working group in recreation services moved forward on council's motion to increase accessibility and was considering various implementation strategies. Around the same time the Kingston Community Roundtable on Poverty approached Council regarding a transit fare support program. In addition, the Environment, Infrastructure & Transportation Policies committee passed a resolution to find ways of making public transit more accessible to low income individuals and families, especially those on social assistance. The Environment, Infrastructure and Transportation Policies (EITP) Committee passed a motion recommending free monthly passes for social assistance recipients and half price passes for those with a net family income under the LIM. Staff from Kingston Transit, Community and Family Services, and ODSP, as well as representatives from the Kingston Community Roundtable on Poverty, worked together to develop the ATP program. For key informants, the involvement of the community-based Roundtable (supported by a three-year grant from Council) was deemed invaluable. The support of Council, assistance of senior staff, and the contributions of inter-departmental working groups were also considered pivotal to the success of the ATP program.

At a roundtable meeting, it was suggested that both of the proposed programs (transit pass and recreation discounts) be made more accessible through a **"one window" approach** that would avoid asking those living in poverty to tell their story multiple times. As a result of collaborations between three city departments (Kingston Transit, Recreation, and Community and Family Services) the concept of MFAP was born. The "one window" eligibility approach for recreation subsidies and discounted monthly transit passes has been recognized as a best practice by the Federation of Canadian Municipalities. The approach reduces the need for multiple applications, and the sharing of income information across several municipal departments. The approach has been very well received by applicants. There is considerable potential to expand the MFAP to include other types of programs and services both municipally and within the community. The MFAP is part of the Community Plan for Poverty Reduction.

Several factors were identified as leading to the **successful establishment** of the MFAP and the ATP programs:

- poverty was one of Council's top concerns,

- the province was also concerned with poverty in Ontario,
- there was good communication across municipal departments,
- program developers had access to quality research on best practices, and useful data on potential applicants, and
- there was invaluable input from the Kingston Community Roundtable on Poverty.

Involvement of the Kingston Community Roundtable on Poverty, research, and data ensured that the program would **reflect facts, not perceptions**, and would thus be better able to address needs. While a free pass for ODSP and OW recipients was considered during the design of this program, it was not considered an effective approach by various community groups. The idea was dropped.

Several **challenges** – and approaches for addressing them – were also identified. Since the administrative approach for the MFAP is unique, its development entailed considerable learning. Adapting processes, procedures, and tools developed by others proved useful. To ensure quick implementation of the program and reduce applicants' stress or anxiety, the program uses an administrative process that is simple and unobtrusive. Given that municipal departments involved did not commonly work together, community services staff acted as a bridge between them. Communication across departments was – and remains – key. Clear information sharing protocols were established and shared with all service/intake locations, and the application procedures could be easily implemented at any service/intake location. Training ensured front line staff would pass along the correct information and would know what to do with those who were approved.

The ATP program had a very **slow start** in its first year despite advertising. The start up phase reflects the time taken to develop, implement, and raise awareness of its existence among potential recipients. Word of mouth has turned out to be the best advertisement strategy.

Funding

In developing the program, partners thought the loss in revenue resulting from the discounted fare would be recovered through increased ridership. While the program has been more successful than anticipated; this has not been the case. The actual **cost of the program** in 2010 was \$165,000 instead of the estimated \$108,000. The cost of the ATP program, other than costs related to administration, is absorbed by Kingston Transit. Administration costs are managed by Community and Family Services. The ATP program is funded through municipal taxation.

Operation

The application process – which is handled by the Community and Family Services Department – is friendly, quick, and simple. **Application** can be made on a drop-in basis at Community Services several times a week or at a number of alternative locations. The program operates on a first-come, first-served basis, although there is no ceiling or cap in regard to the number of passes issued. Pass agents are trained to ensure that eligibility criteria are satisfied. Proof of income must list household or family income. A number of other documents are accepted as proof of income:

- Ontario Works Drug Benefit Eligibility Card,
- Canada Child Tax Benefit Notice from Canada Revenue Agency,
- Ontario Disabilities Support Program Drug Benefit Eligibility Card,
- Guaranteed Income Supplement Notice,
- Ontario Child Care Supplement for Working Families Entitlement Notice,
- Goods and Services Tax/Harmonized Sales Tax Credit Notice, or
- Personal Income Tax Notice of Assessment from all members of the household. A Notice of Assessment from a single member of the household is unacceptable, in cases where other household members would also like to obtain an ATP.

Those on Ontario Works may be able to cover all or part of the cost of the reduced transit passes through OW discretionary benefits depending on their individual circumstances and activities. Only residents of Kingston and households with an after-tax net family Income below LICO are eligible. The discounts apply only to monthly passes (i.e., not to transit tickets). Seniors and youth registered in the MFAP can apply the discount to seniors and youth monthly pass fares (resulting in a deeper discount). **Eligibility** is determined on the spot and reviewed yearly. Once registrants have obtained a card indicating their eligibility, they can then purchase a photo ID card and monthly transit pass at City Hall. Subsequent passes can also be purchased online. Purchasing passes online is a more accessible option for those who have access to the technology.

As mentioned above, participants must reapply on an annual basis. A shorter eligibility period was deemed unnecessary as program designers and administrators felt people's financial situation is unlikely to change dramatically over the course of one year. Ensuring that low income families can access programs through a simple, unobtrusive process is considered a key to the success of the program.

Impact

Approximately 2400 households completed MFAP applications during the first two years of operation. Eighty percent of households accessing the program are on social assistance while the remaining 20 percent would be classified as “working poor”. Between Nov 2011 and the launch of the Affordable Transit Pass (ATP) program, 657 individuals purchased at least one monthly discounted transit pass. ATP riders average about 38 trips per month, which is consistent with the regular adult monthly pass riders.

The point was raised that public transit does not always meet the need of city dwellers, inclusive of those Kingstonians who live in low income households. While the ATP is of tremendous value, people with low incomes – like other Kingstonians, require something other than public transit (for example a car or taxi) given challenges surrounding the accessibility and availability of public transit. These deficiencies limit the utility of a discount bus pass.

Information Sources

The following sources were used in the development of this profile. Only those providing unique or specific information are cited in the text.

City of Kingston. (2011, November 9). *Municipal Fee Assistance Program Update [Information Report to Arts, Recreation & Community Policies Committee]*.

http://www.cityofkingston.ca/pdf/cityhall/committees/community/agenda/2011/ARC_A0811-11022.pdf

City of Kingston. (2009, September 8). *Municipal Fee Assistance Program [Report to Environment, Infrastructure and Transportation Policies Committee and Arts, Recreation and Community Policies Committee]*.

http://www.cityofkingston.ca/pdf/cityhall/committees/community/agenda/2009/ARC-EITP_Agenda-SchedA.pdf

City of Kingston. (2012). *Municipal Fee Assistance Program. Application.*

http://www.cityofkingston.ca/pdf/social/MunicipalFeeAssistanceProgram_Application2012.pdf

Hitchen, Cheryl (2011, December). Social Planning and Policy, City of Kingston. Personal communication.

Kingston Community Roundtable on Poverty Reduction (KCRPR). (n.d.). Submission to the Social Assistance Review from the Kingston Roundtable on Poverty Reduction.

<http://www.socialassistancereview.ca/uploads/File/Kingston-Community-Roundtable.pdf>

City of Windsor

In Brief: In January 2011, Transit Windsor started the Affordable Pass Program (APP) – which is meant to increase the affordability of public transit in the City of Windsor by offering a discount bus pass to eligible individuals, families, or households. Eligibility is based on after-tax LICO. The discounted monthly bus pass is \$40 for adults and students, thus a 49% and 27% discounts, respectively. (In December 2011, regular passes were \$79 for adults and \$55 for students. A monthly seniors' pass is already priced at \$40).

At the time the APP was being considered, Transit Windsor was conducting a comprehensive review of the fare structure. Fares implemented include a day pass, family day pass, and open window transfer of two hours on any bus route, and a War Veteran Transit Pass program, which offers a free lifetime transit pass to veterans. All of these increase affordability and in some cases availability, and are potentially beneficial to those with lower incomes.

Pathway to Potential is a fund, Windsor Essex County's Poverty Reduction Strategy, and a collaborative that provides direction and is working to reduce poverty in the county. Transit Windsor was successful in applying for a grant to fund the Affordable Pass Program. In its first year of operation, the program cost was only \$125,000, although \$375,000 had been budgeted.

Establishment

The APP came into being, in part, because of City Council's concern over the high unemployment rate in Windsor. As a result of Council's belief that poverty reduction is a critical first step toward creating a healthy community, the City of Windsor and County of Essex launched and continues to fund Pathway to Potential. **Pathway to Potential** is both the name of the Windsor- Essex Poverty Reduction Strategy, and an organized network of concerned organizations whose mission is to facilitate the removal of systemic barriers and to support initiatives that improve the lives of people living in poverty, or who are at risk of living in poverty. Pathway to Potential, as an organization, is involved in poverty related initiatives. As a fund, Pathway to Potential supports proposals that are aligned with one of its five strategic 'pillars' (housing, health, early learning and child care, income, and education and skills training). Pathway to Potential has funded approximately 25 poverty reduction strategy initiatives to date.

Soon after the formation of Pathway to Potential, Transit Windsor launched a **fare structure review**. Pathway to Potential offered its support and input on Transit Windsor's plans, given the impact of transportation on its five strategic pillars. Voices Against Poverty also raised concern over the cost of bus passes with City Council.³ Transit Windsor submitted a grant application to Pathway to Potential for the Affordable Pass Program. Their application was successful.

Senior management from Transit Windsor, a city councilor who chaired Transit Windsor, Transit Windsor staff, Social Services staff, Pathway to Potential's Affordable Transportation Group, and Voices Against Poverty were all involved in **creation and implementation** of this program. Non-confrontational communication between staff as well as the exchange of information, knowledge, and experiences amongst stakeholders (inclusive of prospective pass users) proved vital to the successful implementation of the Affordable Pass Program.

³ Voices against Poverty is a local community group that formed with the support of Pathway to Potential, intent on raising awareness of and acting on poverty related issues.

Funding

The fare subsidy and administration costs for 2011 are covered by grant monies from Pathway to Potential. Funds are allocated to Transit Windsor. The Affordable Pass Program has no cap.

In 2011, program costs were approximately \$125,000. Since the cost of the program is based on use, not all funds (which totaled \$375,000) were used. Transit Windsor may submit another funding application to Pathway to Potential to cover the fare subsidy and administration costs for 2012. Ideally, increased ridership through uptake of the APP will offset lost revenue as a result of the pass being discounted; however this is not the expectation. Since City Council has promised no tax increases for 3 years and has also asked Transit Windsor to reduce its operating budget by approximately 10%, revenue generation to cover the subsidy and administrative costs of the affordable transit program is critical to the continuation of the APP program.

Operation

As with other new programs, uptake has been slow however, the number of applicants has increased as awareness of the program has risen among eligible recipients interested in using the program. Roughly, 800 passes have been sold since the start of the program to December 2011.

Applications are available online and at the Windsor transit terminal and centre. Free assistance completing the application is available. Eligibility may last 6-12 months depending on the applicant's circumstances. Applicants must provide proof of their combined household income, which can include one of the most recent:

- Notice of Assessment from Canada Revenue Agency,
- Verification of current Ontario Works (OW) benefits,
- Verification of Ontario Disability Support Program (ODSP) Benefits,
- Current Canada Child Tax Benefit Notice, or
- Ontario Child Benefit Notice.

Spouses/partners, and/or dependents of the primary applicant, under the age of 18 years old living in the same household can also apply to the affordable pass program, but must be listed on the primary applicant's application.

Impact

Pathway to Potential and Windsor Transit has and will continue to assess the impact of the Affordable Pass Program. Anecdotally, **impacts** have been positive to date. An evaluation of the APP and its benefits is planned for sometime in the near future. The new fare box and electronic bus passes, combined with information collected at the time of application, allow for data and information collection that can be used to determine needs, transit deficits, and benefits.

Transit Windsor is aware that fares have been and remain a barrier for some patrons, and is committed to serving its customers – including customers with low incomes, by providing quality service, and increasing the accessibility, affordability, and availability of transit services.

Information Sources

The following sources were used in the development of this profile. Only those providing unique or specific information are cited in the text.

City of Windsor. (n.d.). *Affordable Pass Program website*. <http://www.citywindsor.ca/003796.asp>

<http://www.citywindsor.ca/residents/transitwindsor/Fares/Documents/APP%20Application%20Form.pdf>

City of Windsor. (2011, May 10). *Transit Windsor Affordable Pass Program (APP) Application*.

- Government of Ontario. (2010, November 22). Breaking the Cycle; Ontario's Poverty Reduction Strategy. <http://www.children.gov.on.ca/htdocs/English/breakingthecycle/index.aspx>.
- Houad, Tony, Director, Corporate Services, Transit Windsor. (2011, December). Personal communication.
- Pathway to Potential. (n.d.). Website, <http://pathwaytopotential.ca/>
- Pathway to Potential. (2011, November). *Pathway to Potential 2010 Community Report*. <http://www.pathwaytopotential.ca/docs/2010-Report-2011.pdf>
- Pathway to Potential. (2010, January 25). *Pathway to Potential: Windsor Essex County's Poverty Reduction Strategy; 2009 Report to the Community*. <http://www.pathwaytopotential.ca/docs/2009%20Report%20to%20Community%20-%20Pathway%20to%20Potential.pdf>
- Postma, Caroline, former city councilor and former chair of the Transit Windsor Board. (2011, December). Personal communication.
- Transit Windsor. (2011, May). *Transit Windsor Affordable Pass Program (APP)*. <http://www.citywindsor.ca/residents/transitwindsor/Fares/Documents/APP%20Pamphlet.pdf>
- Vasey, Adam, Director, Pathway to Potential. (2011, December). Personal communication.
- Warsh, R. (2011, May 16). *Report No. 3 of the Social Development, Health & Culture Standing Committee of Its Meeting Held May 11, 2011*. City of Windsor.
- Windsor Star, Nov 25, 2010. *Low income riders get break on Transit Windsor bus passes*. <http://www2.canada.com/windsorstar/news/story.html?id=950e290c-5920-47fc-9ae1-f1c79bb26d5d>

York Region

In brief: York Region has approved a pilot program – to begin in Spring 2012 – to help make transit more affordable for people with low incomes. The pilot has two components. The first is a 50% discount transit pass program (\$57.50 instead of \$115) directed toward recipients of OW and ODSP with earnings. The second is a transit ticket program that enables community agencies to purchase up to \$2500 in transit tickets that can then be given to clients with low income for free. The discount pass program will be operated through the York Region Community and Health Services Department in partnership with York Region Transit; the ticket program will be operated in partnership with community agencies. The Region has allocated just over \$1.3 million to the programs, which includes funds for administration and evaluation.

Establishment

York Region has a Community Plan to Address Homelessness. In 2008, during its second review and update, **affordable transportation** was identified as a key issue. Based on this review, as well as other reports and concerns raised by citizens, federal funding from the Homelessness Partnering Strategy was allocated to the York Region Alliance to End Homelessness. Funds were to be directed to a needs assessment (York Region Alliance to End Homelessness, 2008). The results of the assessment reinforced transportation as a key issue. Given the geography of York Region – which is dispersed and includes a substantial rural area – transportation included public transit as well as other means of transportation.

In addition to the results from the assessment, concerns were raised in other reports (e.g. Pearson and Kelly) and by citizens/citizen groups. The latter included stakeholder input in the development of the Community and Health Services Department Multi-Year Plan and deputations to York Regional Council requesting reduced transit fares for people with low income. Given these concerns, the Region was compelled to act. A **pilot transit ticket program** was initiated, which allowed twelve agencies to purchase bus tickets at a discounted rate. This pilot was funded as part of the Homelessness Partnering Strategy. Another part of the Strategy enabled the York Region Alliance to End Homelessness to form a collaborative, which included York Region Transit staff, and which initiated a project, distributing funds for housing, employment and education related initiatives, as well as an assessment of their impact. The partnering strategy (including the collective projects as well as the transit ticket program), were extended for a second year and provided research evidence to support the need for improved access to transportation (York Region Alliance to End Homelessness, 2009). The ticket program, however, ended when the funds were depleted.

The Region also held **community consultations** (York Region 2010b). The consultations examined the issue of affordable transportation, and entailed a review of transit subsidy programs in other municipalities. A pilot was approved by Regional Council, in principle, in early 2011 (York Region 2011a). The proposed **pilot involves a two-tiered approach**. One tier focuses on supporting OW and ODSP recipients – as a means of supporting employment or job-related training. The other tier focuses on people with low incomes by supporting community agencies in their efforts to assist low income residents meet basic transit needs.

York Regional Council also directed a **letter to the Province**, at a time when the province was undergoing a review of the social assistance system, suggesting that the review explore ways of enhancing financial support for transportation.

Responding to the transportation needs of all residents has been part of Regional Government's broader **strategic plan** (2007 York Region Sustainability Strategy) and the Community and Health Services Department Multi-Year Plan (2010). Both plans helped support the initial work on transportation issues, and more specifically, transit cost barriers. Additionally, the Regional Government's efforts and investment in the pilot is further aligned with Regional Council's 2011 to 2015 Corporate Strategic Plan's objective to contribute to Regional economic vitality by helping low and moderate income residents access basic needs. Implementation and evaluation of the pilot is an indicator of success in the Corporate Strategic Plan.

Funding

The program has a **budget of \$1.3274 million**, with the majority – \$966,000 – allocated to passes. There is also \$250,000 allocated to tickets, \$96,400 to administration (staff & benefits), and \$15,000 to evaluation. The funds are being allocated to the Community and Health Services budget and are drawn from the York Region Social Assistance Reserve Fund, which is primarily funded through the municipal tax levy.

Operation

The **design** for this two-tiered program was approved by York Regional Council in October 2011. The program will start in spring 2012 (Community Health Services, Personal communication.).

A **working group** that involved Regional staff from the Community and Health Services Department (Social Services, Strategic Service Integration and Policy), the Transportation Services Department (Transit, Policy and Planning), and a provincial ODSP representative (York Region Office) was formed over the summer of 2011 to design the program in detail (York Region 2011b). The working group identified a set of principles for the program and considered means for providing support to target groups. Two groups were identified: 1) OW/ODSP recipients with employment-related criteria, 2) community agencies providing assistance to people with low incomes. The first of these groups will be addressed through the transit pass program where **eligibility** for the transit passes will be based on being a recipient of OW or ODSP and on employment-related criteria:

- OW and ODSP recipients with earnings (expected to be the largest eligible group),
- OW recipients transitioning off OW to employment (for six months),
- new applicants to OW (for their first three months), or
- ODSP clients participating in the Employment Support Program.

By focusing on recipients of OW/ODSP, eligibility can be determined through regular OW and ODSP case management processes. Development of a new application process would not be required. As of early 2012, patrons will be able to purchase transit passes at a 50% discount. The subsidy will likely be provided through vouchers. Up to 1400 passes will be available through the program.

Potential recipients will work directly with their caseworkers to determine eligibility and need. Those that are already receiving specific support for transit costs through OW will not be eligible for the program. Program registrants will receive three- or six- months worth of vouchers, to be redeemed at York Transit's main office. Most patrons will be approved for three months, with the possibility of renewal. All patrons leaving OW will get a one-time six- month subsidy.

Local municipalities in the Region are being approached to participate in operation of the program, notably, as locations where transit passes can be purchased by those registered in the program.

With respect to the second target group, the second tier of the program will support various community agencies which will be given up to \$2500 in transit tickets from the Region, to support their clients'

transportation needs. In this way, those operating on the ‘front lines’ will be able to distribute tickets directly to those most in need.

The transit ticket program will build on existing community investment funding processes. Up to 100 agencies funded by the United Way York Region or through the Community and Health Services Department community investments program will be eligible to apply for funding. Each can receive up to \$2500 to purchase tickets, which is equivalent to approximately 900 single-use tickets. Tickets will be given to residents with low incomes to gain access to employment, housing, and education and to cover urgent basic needs.

Impact

Funding for evaluation is part of the two-tiered programs budget.

Information Sources

The following sources were used in the development of this profile. Only those providing unique or specific information are cited in the text.

- Community and Health Services Department, York Region. (2011, December). Personal communication.
- Pearson, T. & Kelly, Y. (2010, April 10). *Behind the Masks: Testimonials from those marginalized by income - A Report on the Interfaith Social Assistance Reform Coalition (ISARC) Social Audit in York Region*. <http://www.yrfn.ca/pdf/ISARC%20Report%20September%20Final.pdf>
- York Region Alliance to End Homelessness. (2008, August). *Needs Assessment: Transportation Access of Homeless and Under Housed in York Region*. http://www.yraeh.ca/~yraeh/sites/default/files/us_erfiles/YRAEH-Transportation-Needs-Assessment-Aug08.pdf
- York Region Alliance to End Homelessness. (2009, July). *Final Report: Homelessness Partnering Initiatives Transportation Project (Year One)*. http://www.yraeh.ca/~yraeh/sites/default/files/us_erfiles/2009%20Transportation%20Final%20Report%20FINAL.pdf
- York Region Alliance to End Homelessness. (2011, December). Personal communication.
- York Region. (2007). York Region Sustainability Strategy: Towards a Sustainable Region. <http://www.york.ca/NR/rdonlyres/ddvav3nrw2657f4dljc4m3kba4v35qzqdtw62f3zce5cvwur4wbcymuvnoobehvgdkpzgsjrzeohstbduin2jlsmd/Final+Sustainability+document.pdf>
- York Region. (2007). York Region Community and Health Services Department Multi-Year Plan: Investing in Our Communities 2010-2015. <https://www.york.ca/NR/rdonlyres/braidy5rl2j54wuqfjt25qfnie2a4yxuc6t5sz3vneybivfcqb3xz3xjbcongqm5x4w7sm3a56vx7f7bunyc44uu2se/Multi-Year+Plan+for+CHS+2010-2015.pdf>
- York Region. (2010a, January 21). *Update on Fare Subsidy Requests Report No. 1 of the Transportation Services Committee*. <http://www.york.ca/NR/rdonlyres/jcm4mg15ae7s3agk7wwgkecb5ej7c4bi5tz4lg6euy35j26dcrlj5oagxn6er3cdewihu6vxxk2pxpunn7rzt2ktdqh/rpt+1+cls+2.pdf>
- York Region. (2010b) *Community Soundings Invitation*. <http://york.ca/NR/rdonlyres/oo5qz3x4ef2i6ane2kj6wve25o2us5pbbweileqbk3qzve3vujgpo5vmsk4brn53372d6cucohmtql6phvaoxduf/sep+22+mcneil.pdf>
- York Region. (2011a, February 17). *Transit Fare Subsidy Requests Update, Report No. 2 of the Community and Health Services Committee*. <http://york.ca/NR/rdonlyres/ajixcq4c2fkukddx5jczwrlagzuni4v7gu77krnlhmiy5jntfimi5vpr4onaqwjuhw3vp3mp65uai547gjfmg4gu32b/rpt+2+cls+2.pdf>
- York Region. (2011b, October 20). *Transit Fare Subsidy Pilot Program, Report No. 8 of the Community and Health Services Committee*. <http://www.york.ca/NR/rdonlyres/i4ldkoedyfgsfz724zr6npgks7lbzoxjairsfhhbvve4eop4zcmukllvquakmskv25dmmcnoe3aweqvfewvji67axda/rpt+8+cls+4.pdf>

York Region. (2011c, October 20). Media Release:
York Region pilots new transit subsidy program.
<http://www.york.ca/Publications/News/2011/October+20,+2011+York+Region+pilots+new+transit+subsidy+program.htm?ODA=1>

York Region Food Network. (2012, January).
Personal communication.

York Region Transit. (n.d.). Website, fares page.
<http://www.yrt.ca/en/farespases/prices.asp>

York Region Transit Committee. (2008). *York Region transit community-based social services discount pilot program (No. 6)*. York Region.
<http://www.york.ca/NR/rdonlyres/lbjxz7hgzkz3asyqxppoih3v7cua5vwwusrgi4kvht6g7psm3epgyru7qhbzxzfrkkjnbz25zmh6eeakeyxj6vzi6c/rpt+6+cls+6.pdf>

City of Guelph

In Brief: Guelph's Affordable Bus Pass Program (APP) two-year pilot is planned to start in July 2012. The program is designed to enable people with low incomes (i.e., below the Low Income Measure) to purchase discount transit passes. Passes will be priced at 50% of the regular bus pass for youth, adults and seniors, putting the cost of a pass at \$31, \$36, and \$30, respectively. The pilot phase of the affordable bus pass program is not capped and is budgeted for \$135,350 for 2012. The costs will be covered through municipal taxes.

Establishment

The **Guelph and Wellington Task Force for Poverty Elimination** (GWTFPE) formed early in 2009 in response to the community's call for and council's commitment to poverty reduction. The task force is a community based organization, and has the support of government, residents, and community organizations. The GWTFPE focuses on research, awareness building, information and knowledge sharing, and action. The City of Guelph, County of Wellington, and the United Way of Guelph & Wellington are among its funders.

In February 2011, City Council declared their intention to reduce bus services along several routes and increase monthly transit fares. Delegations from the community, Community Voices (a working group of the GWTFPE), and the GWTFPE shared their **concerns over the planned service cuts and fare increase** with council. In early 2011 a Transit Sub-Committee of the GWTFPE formed in response to the proposed cuts, with a focus on reducing the challenges transit riders with low incomes face in using public transit. During Council deliberations on the city's budget later in the year, public delegations called for the reintroduction of routes, and the implementation of an expanded affordable transit program to include qualifying low income households. (The city already offered subsidized bus passes to residents on the Ontario Disability Support Program.) Council decided to consider the latter. The Transit Sub-Committee worked with staff from Community and Social Services and Guelph Transit to develop recommendations. The co-chair of the GWTFPE, who sat on council at the time, facilitated communications.

Council approved the Affordable Bus Pass Program as a **two year pilot**. Community Voices, a group of people facing economic hardship, will be – and has been – consulted on program features.

The Affordable Bus Pass Pilot Program took approximately one year to develop. According to those involved, its establishment was without incident, in large part because of the commitment of council, community organizations, and the public to poverty reduction. Public transit is seen as contributing to Guelph's sustainability.

Funding

In December 2011, City Council passed the 2012 operating and capital budgets, and approved a 3.52% tax hike. The bus pass program alone, as initially envisioned required a tax increase of over 3%. Given Council's commitment to very limited tax increases, the Affordable Bus Pass Program will be **launched in July** rather than January of 2012. The tax increase will cover implementation of the bus pass program mid-year, and the reinstatement of bus service on five remaining statutory holidays. The mid-year implementation of the Affordable Bus Pass Program will cost \$135,350 (saving \$120,000 with the delayed start) and is covered through municipal taxes. Reinstated services will cost \$27,900.

Those developing the pilot program looked into what other municipalities were planning or had accomplished in regard to increasing the affordability of public transit, and noted that costs were difficult to estimate, and – more often than not – varied. **Cost projections** generated by city staff were considered rough estimates. Program developers also noted that the success of the program depended on when people started using the pass. Evaluations of several affordable transit programs have noted a lag between launch of a bus pass program and widespread use of a bus pass, which is often attributed to challenges surrounding marketing.

One of the most challenging aspects of any affordable transit program is **cost recovery**. Financial considerations include loss of revenue given the discount, changes in ridership given changes to the fare structure, impacts on service requirements given fare changes, administrative costs, marketing costs, and the cost of evaluation. Given that the Affordable Bus Pass Program is in development and not yet launched, the real cost of the program is not known. If the Affordable Bus Pass Program is successful, city council is committed to extending the program in a way that is fiscally responsible.

Operation

Given that this is a pilot program, program features such as eligibility criteria and the application process have not yet been finalized. There are however, a number of recommendations. Those recommendations follow.

To avoid a complicated and stressful **application process**, programs designers are committed to “developing a person-centred, transparent and reasonable application process”. Guelph Transit will administer the program; applications for the pass will likely be handled by Service Guelph (the City’s customer service initiative). Community agencies will provide assistance with completing applications. Transit passes will be mailed directly to the applicant or to the community agency that submitted the application.

The city is open to **partnering** with agencies interesting in assisting in the administration of the program and provision of passes. Making the pass available via different service agencies to improve various facets of the program, how social and community oriented agencies might provide assistance to people while they complete the application, and introduction of a process similar to Kingston’s MFAP will be explored. The MFAP allows for a single point of access for those seeking financial assistance regarding transit, recreational programs, and recreational opportunities for youth and children.

Eligibility

Eligibility will likely be based on the Low-Income Measure (LIM). A number of tax-based documents will be accepted to determine eligibility. Accepting select documents only could slow, if not dissuade, those eligible from obtaining a pass or cause tension between applicants and service providers, anxiety, or, in effect, increase the cost of the pass to those applying. Recommendations suggest that seniors and those receiving ODSP benefits should only be required to show proof of eligibility every two years, while all other applicants should show proof of eligibility every six months.

The GWTFPE recommended use of the **LIM instead of after-tax LICO** as an eligibility criterion for the following reasons:

- the cost of transportation does not enter in the calculation of LICO thresholds,
- LICOs vary by size of community, but are not specific to any city/region,
- the LIM is easily understood and takes into account important measures around inequality,
- there is adjustment for family size using a widely accepted equivalence scale.
- Ontario’s Poverty Reduction Strategy uses the LIM (among other indicators), as does the Wellington Dufferin Guelph Health Unit, and
- recent LIM data for the region was readily available.

According to Statistics Canada LIMs are frequently used internationally, because the measure entails fairly simple calculations, and not because of sound scientific justification. Guelph Transit is an important partner in this pilot project, as are the department of Operations, Transit and Emergency Services, and Community and Social Services. Guelph Transit will retain **ownership** of the Affordable Bus Pass Pilot Program. The GWTFFE, Council's commitment to reducing poverty, the cultural and political mores of Guelph, and the engagement of those living in poverty or with a low income, have been pivotal to the initiation and development of this program.

Impact

A two year pilot provides the opportunity to determine the real impacts of the program and the potential long term uptake, without raising concerns over affordability. It also ensures that administrators can reach intended users, and that intended users have an opportunity to take advantage of the program. **Evaluation studies** will track how many people have used the pass and the impact those passes have had on their lives. Quarterly reports will be prepared throughout the pilot. The evaluation will include a variety of quantitative and qualitative methods.

Information Sources

The following sources were used in the development of this profile. Only those providing unique or specific information are cited in the text.

- City of Guelph. (n.d.) *Subsidized Bus Pass for Adults with Disabilities; Subsidized Bus Pass to Grow*. <http://guelph.ca/living.cfm?itemid=78458&smocid=2158>
- City of Guelph. (2011, July 12). Community & Social Services Committee Agenda http://guelph.ca/uploads/Council_and_Committees/CSS/css_agenda_071211.pdf
- City of Guelph. (2011, October 12). City Council Agenda. http://guelph.ca/uploads/Council_and_Committees/CSS/css_agenda_101211.pdf
- City of Guelph. (2011, December 19). Community & Social Services Committee Agenda. http://guelph.ca/uploads/Council_and_Committees/Council/council_agenda_121911.pdf
- Ellery, Randalin, Coordinator, Guelph & Wellington Task Force for Poverty Elimination; Social Planning Associate, United Way of Guelph & Wellington. (2011, December). Personal communication.
- Ellery, R. (2011, June 22) Greater Political, Public Focus Needed on Poverty." *Guelph Mercury*. <http://www.guelphmercury.com/opinion/columns/article/552032--greater-political-public-focus-needed-on-poverty>
- Ellery, R. & Peters, A. (2010). *Impact of Public Transit Fees on Low Income Individuals Families and Individuals in Guelph*. Guelph & Wellington Task Force for Poverty Elimination and Institute for Community Engaged Scholarship. http://gwpoverty.ca/wp-content/uploads/2011/02/Transit_Research_Feb_2011.pdf
- Government of Ontario. (2010, November 22). *Breaking The Cycle: Ontario's Poverty Reduction Strategy; Important Changes to How Poverty Is Measured*. <http://www.children.gov.on.ca/htdocs/English/breakingthecycle/report/2010/LIM2010.aspx>.
- Guelph & Wellington Task Force for Poverty Elimination. (2011, May). *The Guelph & Wellington Task Force for Poverty Elimination's Report to the Community*. <http://gwpoverty.ca/wp-content/uploads/2011/02/PTF-Report-to-the-Community.pdf>
- Guelph Tribune. (2011, July 12). Low-income bus users could see price break. <http://www.guelphtribune.ca/news/low-income-bus-users-could-see-price-break/>
- Guelph Tribune. (2011, October 11). Transit Changes Pushed to January. <http://www.guelphtribune.ca/news/transit-changes-pushed-to-january/>
- Peters, A, and Shaw, C. (2010, December 20) *Report on The Task Force for Poverty Elimination "Success Stories" Project*. The Research Shop, University of Guelph. <http://www.theresearchshop.ca/sites/default/files/Success%20Stories%20Project%20Report.pdf>

Shuttleworth, J. (Oct 07 2011) Expanding Guelph Transit's low-income bus pass program considered. GuelphMercury.com
<http://www.guelphmercury.com/news/local/article/605930--expanding-guelph-transit-s-low-income-bus-pass-program-considered>

Tracey, S. (2011, October 25). Guelph to phase in increase for subsidized bus pass holders. *Guelph*

Tribune.

<http://www.guelphmercury.com/news/local/article/614868--guelph-to-phase-in-increase-for-subsidized-bus-pass-holders>

Ward 2 Guelph: The Deuce. (2011, October 28). Pilot Project Offers Bus Pass Breaks.

<http://ward2guelph.wordpress.com/2011/10/28/pilot-project-offers-bus-pass-breaks/>

Provincial transit pass programs



All of the foregoing transit pass programs are funded through municipal tax levies. The following two programs identified through internet keyword searches (see Research Methods) are instances in which provinces provide funding for transit pass programs. In addition to these provincial transit pass programs it is noteworthy that Ontario provides some transportation subsidies for social assistance recipients (Ontario Ministry of Community and Social Services 2010). Alberta maintains that by providing funds to municipalities for transportation related expenses (spent at the discretion of the municipalities) they have already made their contribution.

British Columbia

The province of British Columbia operates the BC Bus Pass Program through the Ministry of Social Development. Through this program, which operates in partnership with BC Transit and regional/municipal transit services (including TransLink), low-income seniors and persons with disabilities are eligible for a deeply discounted annual bus pass. Eligibility is restricted to communities with public transit and is based on other existing programs, notably:

- those receiving benefits from Income Assistance for Persons with Disabilities, 18-64 years old,
- those receiving benefits from Income Assistance who are 60-64 years old,
- those receiving Federal Old Age Security and Guaranteed Income Supplement or the Spouse's Allowance to Old Age Security, or
- those over 65 years old who would qualify for OAS and GIS, except that they have less than 10 years residency in Canada (Government of British Columbia, Ministry of Social Development, 2011).

The annual pass is \$45, regardless of jurisdiction. This means the provincial subsidy is greater in Vancouver (where in December 2011 a one zone adult pass was \$81/month) than in Vernon (where in December 2011 an adult pass was \$50/month). Passes are valid for the calendar year January 1-December 31. Application is initiated over the phone, and completed by mail. Passes and renewal applications are mailed to registrants. BC Transit is a provincial crown agency that coordinates public transportation across the province, with the exception of the Greater Vancouver Regional District, which is covered by TransLink.

Saskatchewan

Similar to British Columbia, the Province of Saskatchewan provides funds for a discounted monthly transit pass in partnership with transit authorities across the province. Those eligible include recipients of a variety of social assistance benefits, notably those receiving benefits through (Government of Saskatchewan, 2011):

- the Saskatchewan Assistance Program,
- the Provincial Training Allowance,
- the Saskatchewan Employment Supplement,
- the Transitional Employment Allowance, or
- the Saskatchewan Assured Income for Disability Program

The price for the discounted monthly pass varies by jurisdiction due to varying prices for regular adult monthly passes. The provincial subsidy is \$21/monthly pass across jurisdictions. . In 2011, about 63,000 monthly discounted passes were sold through the provincial program.

Information Sources

The following sources were used in the development of this profile. Only those providing unique or specific information are cited in the text.

Government of British Columbia, Ministry of Social Development (BCMSD). (2011). *Additional Assistance for British Columbians in Need* webpage. <http://www.mhr.gov.bc.ca/programs/other.htm#bp>

Government of Saskatchewan (2005, December 19). *News Release: Discounted Bus Passes Make Transit More Affordable.*

<http://www.gov.sk.ca/news?newsId=2e220ca8-73b7-4e72-9ce6-bba2fbd6ebbf>

Government of Saskatchewan (2011, February 15). *News Release: Discounted Bus Pass Program Renewed Through September 2011.* <http://www.gov.sk.ca/news?newsId=5db4ed30-e9b2-4d91-bcc0-86d9e10b65e5>



Other types of programs and subsidies

The primary focus of this project and, consequently, the foregoing profile descriptions is discount transit pass programs for people with low incomes. Discount ticket programs were also considered, although to a lesser extent. There are, however, other types of programs that can increase the affordability of transportation, including programs that do not involve public transit. Select programs identified by the authors over years of work in the area of affordable transportation (see, for example, Dempster 2008, Dempster and Tucs 2009) are briefly described in this section. Some of these programs are unique, although many can be found in multiple jurisdictions. Only a few are referred to by name as the intent is to provide a sampling rather than specific detail on the programs/services.

Free Public Transit

Social and environmental advocates present arguments for **free public transit for all** citizens (social and environmental benefits; match funds supporting public transit with those spent on infrastructure for cars; reduce social/environmental costs associated with cars). As an example, Hasselt, Belgium has been operating free transit since 1997. Free transit for particular groups of people, however, are common. In order of decreasing commonality, these include people registered with the Canadian National Institute for the Blind, veterans, children under the age of five and attendants travelling with people with disabilities. Less common is free transit based on time of day or geographic factors (e.g. Winnipeg and Halifax), such as free mid-day or downtown service. While not directly aimed at people with low incomes, all of these free transit options could be of benefit to people with low incomes.

Bulk Purchasing

Some transit authorities provide (minimal) discounts based on **bulk purchasing** or on time/length of use. Among the former, most common are corporate or company passes that provide employees/employers with discounts on transit passes. Passes are purchased through employers. Typically, a minimum number of employees must participate. Another example is the increasingly common “U-pass” or college pass. These passes are offered at a greater discount than regular student passes as they are purchased as a full term block (e.g., four months). In some cases, *all* students pay a premium as part of their student fees, whether they plan on using public transit or not; those who purchase receive a greater discount. One unique example of a bulk-purchasing program is the Neighbourhood Eco Pass program in Boulder, Colorado, which is available on a neighbourhood basis.

Bulk purchasing is attractive to transit authorities because: 1) the guaranteed income from the bulk purchase is seen as a reasonable trade-off, even if there is a revenue loss from the discount; 2) (especially with the U-pass) although all participants contribute to the cost, only some use the transit option. These programs also rely on the factors considered important in providing discounts for books of tickets and monthly passes: to reward frequent users of the transit system, which is used as a means to enhance sustainability of the transit system. Any low income transit program that can take advantage of these types of discounts could be of benefit to low income patrons. For example, in Waterloo, the TAPP program purchases passes at the corporate rate, providing a small increase in the number of passes that can be purchased under TAPP’s budget.

Different Types of Passes

There also a range of different types of passes such as weekly passes (7 day or 5 day), day/weekend passes (for individuals or families), summer-time student passes, free spring-break passes, and discounted student/youth pre-paid passes (e.g., 6 month, term length). Day passes are commonly designed for use by families – including combinations of one or two adults with up to four or five children. Passes of this type, especially at a discounted price, could be very helpful for families with low incomes.

Open-Ended Transfers

Open-ended transfers – which allow users to ride in any direction anywhere in the system – are also advantageous. While forty-five minutes to an hour are common, some jurisdictions have extended these up to two hours.

Different Types of Buses

Niagara Region has a “job-bus” – which is a collaborative arrangement among employers and employees – that shuttles employees from particular communities to their work at hotels in downtown Niagara. Since public transit is not a viable option in these areas, the service enables those who cannot afford a car to maintain employment.

Other services designed to **extend the routes** covered by public transit include small buses using fixed or flexible routes in particular residential/outlying areas, as well as the integration of taxis and transit, where transit patrons can extend their ride into little-used areas by using a taxi for a minimal surcharge. In the Banff/Canmore area, empty school busses returning to their point of origin provide low-cost transportation to people who want to move between the two communities.

Provision of transportation services other than public transit

In many situations, **public transit is not a viable option** for people with low incomes. To address this, government transportation subsidies mentioned in the profiles (e.g. to people on social assistance for medical or employment-related transportation) are sometimes provided as taxi or gas vouchers or parking tokens. There are also examples of transportation services being provided by volunteer or not-for-profit agencies.

Efforts to facilitate **shared rides and car pooling** are also beneficial for people with low incomes in circumstances where public transit is ineffective. Such efforts typically involve processes that facilitate person-to-person arrangements. These range from efforts that entail coordinating rides through soccer clubs to the somewhat more involved matching system of CarpoolZone.ca.

Shared car ownership through **car co-operatives** is another increasingly common opportunity that may benefit some people with low incomes. Admittedly, the initial membership fee can be prohibitively expensive for some. To address this, Grand River Car Share in the Region of Waterloo has a “transportation bank”: people with low incomes can pay the membership fee in small instalments over time (without interest), enabling them to become members of the car co-operative more easily. In Montreal, with the purchase of twelve monthly Societe de transport de Montreal (STM) transit passes a

person can become eligible to waive the Communauto's subscription fee. This is one of a few partnerships offered as part of the "STM Transportation Cocktail" (STM, n.d.).

Discussion: Comparisons, challenges, successes



There are many factors involved in establishing and operating programs to increase the affordability of transportation for people living with low incomes. Discount transit pass programs are the key focus of discussion; however, in many instances establishment of discount transit ticket programs happened concurrently so they are considered together. This section discusses the establishment, funding, operation and impact of various programs. Program challenges and successes are also described.

Factors Contributing to Program Establishment

The key factors that played a role in establishing affordable transit programs were advocacy on the part of community groups and champions within government; awareness of the importance of transportation for those living on low incomes; and/or an impending change that would make transit less affordable. In-depth study of transportation options and the development of committees to assist in operationalizing programs were also helpful.

Community Advocates/Champions in Government

In all cases, community groups and/or champions within government (councillors and/or municipal staff) advocated for affordable transit programs. Anti-poverty coalitions and those advocating for people with disabilities were most commonly involved in advocacy efforts. Champions on council – who understood the political and/or policy process – were noted as invaluable assets, especially when they were also part of advocacy or community groups. Since affordable transportation is a concern for many groups, the value of finding and aligning with allies was noted. For example a number of community groups came together in York Region around this issue. In Calgary, a community group expanded their focus from people with disabilities to include people with low incomes. Community groups forming alliances with social services/transit departments/municipal staff and vice versa was also critical in many cases.

As well, the efforts of councils and the commitment of staff/departments to hear issues and investigate ways or means of dealing with transportation needs were crucial to success. For example, Guelph Council called for investigation into the challenges associated with transportation. York Region, through its community plan to address homelessness, provided funding for a needs assessment that pointed to transportation as a core need. Similarly, Kingston has a City-funded Community Roundtable on Poverty Reduction. In Windsor, the presence of the City's Pathway to Potential poverty reduction strategy and funding initiative enabled the implementation of its Affordable Pass Program. Further, the efforts of a council member facilitated interaction between city staff and advocacy groups. In Calgary, city staff was involved in establishing a community group focused on affordable transportation for people with disabilities years before the program was eventually approved.

Increased Awareness of the Importance of Transportation

Increased awareness of the essential nature of transportation – and the difficulty people with low incomes and/or disabilities have in being able to access it affordably – was critical in gaining approval for affordable transit programs. The role of advocates in drawing attention to the importance of affordable access to transportation was critical as was hearing the importance of transportation described by those who know of the challenges inherent in – or have personal experience with – living on a low income. Again and again, key informants pointed to the importance of personal stories being told by people with

low incomes and/or disabilities (whether in deputations to council or through letters). “Councillors really had no understanding that \$5 mattered – it was important to have people describe their experience” (Community Advocate, Personal communication). In a few cases such stories were identified as particularly important contributions that ‘turned-the-tide’ and led to program approval.

Proposed Changes to Decrease Affordability of Transportation

An impending change that would decrease the affordability of transportation also helped mobilize action in many cases. For example, a city councillor in Windsor pointed to the City’s plan to cut support for ODSP passes as motivation. Others referred to proposed fare increases galvanizing advocates’ focus and energies – including advocates in the community and champions in government. In one case a more strident call for action was considered necessary; members of a community group arranged a protest to bring attention to deliberations over transit fares and discount pass considerations.

In-Depth Study of Options

In several cases, studies were carried out during an information gathering phase prior to program establishment. Typically, these studies explored the importance of transportation and – at least more recently – investigated programs in other jurisdictions. Calgary carried out studies which assisted in the design of eligibility and operational procedures. In York Region, as part of its community plan to address homelessness, a needs assessment was carried out by a collaborative of community organizations led by the York Region Alliance to End Homelessness. While the needs assessment was not specifically directed at transportation-related needs, transportation was identified as a core concern of people who are homeless or have low incomes. York Region also reviewed transit subsidy programs in other municipalities (as did others). The results were instrumental in development of their pilot program.

Program Funding

Several aspects of funding for discount transit programs were explored, specifically how programs are funded, how funds are allocated, and whether there is revenue generation or loss with these programs.

Source of Funding

Funding for all programs comes from the municipal tax base with only a couple of exceptions. In Hamilton’s transit pass program and the smaller of Waterloo’s two transit pass programs, municipal funds are augmented by provincial contributions. Only a few programs have some assurance of ongoing funding (i.e. line items in the regular budgeting process) with the remainder coming from special/reserve funds.

In general, transportation is the responsibility of municipalities whereas social welfare is the responsibility of provinces. As a consequence, affordable transportation programs are contested territory. As one community agency key informant stated: “affordable transportation is a major concern, but nobody’s mandate”. British Columbia and Saskatchewan were the only provinces to have province-wide transit pass programs that support people with low incomes. In BC, seniors with a low income and persons with disabilities who are receiving income assistance can apply to the Bus Pass Program. Passes can be used on routes offered by BC Transit and the Greater Vancouver Transit (Translink) authority. In Saskatchewan, low income earners who make use one of the provinces social assistance, employment or training allowance, employment supplement, or assured income (for disability) programs are eligible for a discounted monthly transit pass. In both cases the programs operate in collaboration with local transit

authorities. In BC the price of an annual pass is the same for all patrons, so the provincial contribution varies according to municipality due to different pass prices. In Saskatchewan, the provincial contribution remains the same, so the cost to patrons varies according to different pass prices and/or provision of additional subsidies in some municipalities.

The Province of Ontario contributes to some transportation costs on a shared basis with municipalities for people receiving OW or ODSP (OMCSS 2010). Benefits are handled by the municipalities and are limited to subsidies for medical and employment-related transportation. (While these subsidies were not a specific focus of this research, there is variation across jurisdictions with respect to the interpretation and application of these subsidies (Personal communication). Further research on provincial-municipal cost-sharing would be beneficial.)

Among the seven jurisdictions profiled in this report, only two programs included provincial contributions: Hamilton's Affordable Transit Pass and Waterloo's Transportation Assistance Pass Program. Advocates in Calgary, supported by Calgary City Council, have tried for many years to encourage the Province of Alberta to contribute to affordable transit pass programs but without success.

Only four of the profiled transit pass programs have ongoing funding: two in Waterloo, and one each in Calgary and Kingston. Other programs are covered through special or reserve funds, leaving program futures uncertain. This is not surprising in York and Guelph, which are just starting pilot programs; however, in Hamilton and Windsor the programs are not considered pilots, yet futures remain uncertain. Calgary's program, which has been in operation for several years, only recently became permanent. Prior to this, funds came from budgeted transit surplus. While the surplus was not expected to change dramatically, the program depended on a continued surplus and was thus re-considered on an annual basis.

Allocation of Funding

Most of the programs profiled in this report operate under the auspices of social service departments – at least at the administrative level – with funds being allocated to their budgets, to cover expenses. In such circumstances, funds are paid to transit authorities according to the number of passes sold. In a few cases, funds are allocated to transit authorities directly (e.g., Windsor, where the transit authority applied to the City for funds to run the program as well as Calgary). For example, a key advantage noted for allocating program funds to social services is that doing so allows for an appeal to the province for ongoing support since the program is a social service.

Some transit staff felt that it would be inappropriate to allocate program funds to transit or leave transit to take the loss of revenue. From one advocate's perspective, however, one advantage of considering the discount pass purchases as part of transit revenue is that there would be no budget cap. Some also pointed out that social service budgets are more likely to be the first ones cut in a budget crisis. Given such possibilities, allocating program funds to transit budgets may be advantageous.

Administrative Costs

Hamilton and York were the only jurisdictions profiled in which administrative costs (including staffing and evaluation) were explicitly included in the program budget. In most cases, the bulk of these costs are covered by social services – although they may also be shared with other partners, typically transit authorities. In Calgary, administration is covered by Calgary Transit. In Waterloo, community agencies handle administration costs (ie, management of the application process), likely the most work-intensive part of the program.

Revenue Generation/Loss

The question of whether providing discounted passes will lead to a loss or gain in revenue is also a practical question critical to setting sustainable transit budgets. With respect to establishing a transit pass program, a few questions are key: Are most patrons already purchasing transit passes, thus leading to a decrease in revenue due to the discount? Will providing a discount lead to increased sales that will offset the subsidy or even generate revenue?

The hope is typically the latter, although the common expectation was the former. Regina, which started a program in partnership with the province in 2003, experienced an increase in ridership over the first couple of years that off-set the amount the City contributed to the program (although not the provincial contribution). This offset decreased in subsequent years. In Calgary, a study done two years into the program confirmed that there was a revenue loss. In most cases, insufficient research has been carried out to determine how much of a loss programs incur (i.e., how much of the subsidy is not regained through increased pass sales). Part of the challenge associated with answering whether or not discounted passes – given associated increases in ridership – lead to a loss or gain in revenue, is the subjective nature of deciding what is a revenue, benefit, cost, or loss, given that public transit systems are subsidized. This question arises from the complexities of public transit budgeting, where the correlations between fare prices, fare media, routes, scheduling and ridership remain difficult to predict. It is well known that changes in transit cash fares and/or pass prices will affect ridership but to accurately predict the degree to which any increase in price will decrease ridership (and on which routes during what times) is difficult.

Some key informants viewed recipients of affordable bus pass programs as clients, and sought ways of retaining their loyalty. For example, in Windsor, riders with low incomes are considered as a demographic with specific expectations and requirements. There is hope that the program will increase ridership and that patrons will continue to use and prefer Windsor Transit over other modes of transportation, once other options become available to them. In most cases, program uptake was slower than expected. For example, in Waterloo, changes were made to the program after six months to encourage more registrations. In Hamilton, the amount budgeted for a one-year pilot lasted over two years (even with some program expansion). In the first year of operation, Windsor's pass program used only one-third of its (annual) budget. Three factors may contribute. First, while transportation is a fundamental need, even the discounted price of passes may be too expensive. Second, public transit is limiting given schedules and routes, the design of our towns and cities, and cultural expectations. Public transportation is not more likely to meet the needs of people with low incomes than it is to meet the needs of anyone else. Finally, many felt a need to be cautious about advertising a program that has limited availability. Word-of-mouth may well be an effective, but slow means of getting the word out.

Program Operation

Partnerships and collaboration are important to the ongoing operation of affordable transit programs. Other considerations include establishing eligibility criteria and developing application and purchasing processes that are monitored.

Partnerships and Collaboration

The importance of partnerships and collaboration in program development and operation were emphasized by most key informants. Consensus and a readiness among leading partners (typically councils, transit authorities, social services, and community groups) to work together facilitated establishing and ongoing operation of programs. Several key informants pointed to the importance of committees that involve all relevant perspectives/partners, especially when working out details of

program operation. Of the three oldest programs, Waterloo and Calgary have committees that meet regularly to discuss the program and other transportation-related issues. Hamilton's committee meets on an as-needed basis, for example, when a report to Council recommending continuation of the program was developed.

Key informants drew attention to the value of ensuring that the involvement of partners is based on their strengths, expertise and mandates; and that their contributions complement their professional roles. For example, given that community agencies and social service departments are already working with low income patrons, it is appropriate for them to take care of the application process. Similarly, it was noted that having data and statistics gathered and processed by staff who are typically responsible for such tasks improves efficiencies and likely leads to higher quality data.

Key informants also emphasized the importance of keeping the community engaged, and seeking their feedback and/or input. In cases where community partners are not directly involved in ongoing operation or evaluation – such as the aforementioned committees in Waterloo and Calgary – they can still contribute to program design and improvement – as is the case with poverty reduction groups in Hamilton and Kingston. A key informant from one of the older programs noted: "Persistence is required. Just because a program is approved does not mean that the need for advocacy is over."

Partnerships among communities offering transit pass programs may also be beneficial. Finding ways to share best practices, processes, and tools facilitate the continuous improvement of affordable transit programs.

Eligibility Criteria

Another way in which programs capitalize on associations with others is through eligibility criteria and assessment processes. Although most of the programs profiled above have developed their own criteria and processes, one of the ways of determining eligibility is to use application processes that are already in place. For example, two of the discount transit pass programs profiled as well as others listed in the appendix are open only to recipients of OW and/or ODSP (or equivalent) with no additional criteria. These include programs in Cornwall, Durham, Edmonton, Moose Jaw, Ottawa, Regina, and Sudbury.

Among the discount pass programs profiled, the most common eligibility criterion is the Low Income Cut-Off (either before- or after-tax) as determined by Statistics Canada. Calgary uses 75% of LICO. Aside from Statistics Canada's caution that the measure should not be used to define poverty,⁴ many suggest that LICO is not the best measure because it is too low and is not based on the cost of living. Guelph was the only community among those studied that used a different measure of low income, the Low-Income Measure (LIM). A more appropriate measure would be one based on a living-wage or market-basket approach. Since Calgary's program does not have a cap, using 75% LICO was seen as a way to keep the number of eligible patrons below the amount budgeted for the program. (Most other jurisdictions control their budgets by having a limited number of passes available.) Not surprisingly, using LICO is one aspect of the Calgary program – and also of other programs – that is targeted by advocates as something to change since many people with incomes above LICO also have difficulty affording appropriate transportation.

Some discount transit pass programs include employment-related criteria. For example, Hamilton's program is only for people that are working (including full-time/part-time/casual), whether or not they are

⁴“Statistics Canada has clearly and consistently emphasized, since their publication began over 25 years ago, that the LICOs are quite different from measures of poverty. They reflect a consistent and well-defined methodology that identifies those who are substantially worse off than the average... They certainly do not represent Statistics Canada's views about how poverty should be defined.” (Statistics Canada, 2012; also see Fellegi, 1997)

also on OW/ODSP. York's program will focus on recipients of social assistance who are working or looking for work. In Waterloo, the program was initially directed toward people who were working. This was expanded due to slow uptake, but the program seeks to ensure 40% of passes go to people that are employed. One informant noted that an employment-centred approach can be especially helpful for people making the transition from OW to employment, where a minimum wage or part-time job may provide an income that is somewhat higher than OW but lacks other benefits (such as covering medical costs), which may discourage an OW recipient from taking a job. Being able to retain the transportation-related benefit would be beneficial for the transition period (as in York,) or on an ongoing basis (as could be the case in all of the other profiled discount transit pass programs, especially those using employment-related criteria).

Application Process

The most common means for assessing eligibility is to have applicants provide a Notice of Assessment (from Revenue Canada). A couple of key informants noted this is problematic for people who do not file income tax returns, such as homeless people without an income. It is also a historical document and does not necessarily reflect an applicant's current circumstances. Since some criteria are employment-based, jurisdictions such as Hamilton also require applicants to provide four weeks of pay stubs. Kingston requires proof of household income, noting that a Notice of Assessment is not acceptable since it reports individual rather than household income.

The Region of Waterloo is unique in that it uses an honour-based system. Applications are handled by two community agencies and proof-of-income is left to the discretion of agency staff. Typically – and in part because there may be familiarity between applicants and staff – such proof is not required: applicants are taken at their word. Victoria (not profiled above) also has a unique approach (Dempster 2009) – one that is comparable to Waterloo's approach and to the transit ticket programs described above: Community agencies can purchase transit passes at a price of two-for-one. Those agencies are then able to give passes to people with low incomes for specific purposes. Distribution of the passes is at the discretion of the community agencies.

In many cases, the pass program application process is handled by staff within social service departments. For example, in Kingston (where a single application covers recreation and transit subsidies) and in Hamilton, applicants meet with community service aids that assist patrons in completing their applications. In contrast, applications in Calgary are handled by the transit authority. In Waterloo, having the application process handled by community agencies is seen as the key reason that the honour-based system is even possible. A few key informants emphasized the value of having applications processed by someone who understands poverty. In most cases, there is only one or a few central location(s) where applicants can apply. Many key informants emphasized the importance of having a simple application process. Some were concerned that applications were too complicated, especially for those with cognitive disabilities or new Canadians. Most programs provide some support for applicants who need assistance. For example, Windsor refers people to an application assistance program offered by a local college where students in a para-legal program help with any type of application. In Waterloo, community agency staff frequently help people with applications. Kingston noted the training provided to city staff that process applications for the Municipal Fee Assistance Program, which includes eligibility for discount transit passes. The "one window" eligibility for recreation subsidies and discounted monthly transit passes has been recognized as a best practice by the Federation of Canadian Municipalities.

Sale of Passes

Most programs limit sales to a few locations – typically central transit offices/terminals. While limiting points of sale are recognized as difficult for patrons, staff note that those who sell regular passes in

locations such as corner stores do not necessarily understand how to treat patrons respectfully. Centralized sales locations are also seen as advantageous for dealing with concerns about passes being purchased by people who are not eligible for the pass. For example, in Hamilton and Calgary, purchasers are checked against a database of registrants at the time of purchase to ensure eligibility.

Taking a slightly different approach, York Region is planning to provide registrants with vouchers that can be used to purchase passes and is seeking the assistance of all municipalities within the Region to broaden the number of locations where passes will be sold.

Processes and passes/identification that are non-stigmatizing are preferred. Program partners work towards ensuring this to the degree possible. Many noted that passes for people with low incomes look exactly the same as the regular adult pass.

Monitoring

The importance of integrating data collection into the application/purchasing process, i.e., to think about what information will be helpful before asking for it or collecting it was mentioned by several key informants. Information on the use-patterns of low income pass users enables administrators to determine the value, importance and costs associated with such programs.

Programs Impacts and Benefits

All of the longer-term programs – Waterloo, Calgary, and Hamilton – have obtained input from participants. In each case, results were used to support program continuation and/or expansion. In Waterloo, key informants also noted that the results helped to establish a greater understanding of the importance of transportation, which (in combination with waiting lists) has facilitated continued increases in support for the program.

Overall the results of the program evaluations indicate positive benefits for patrons, including having more money available to purchase other necessities; improving access to employment, education, and health services; and maintaining connections with family and friends. In all cases the results were used to support program continuation and/or expansion. While patrons and others noted the value of programs, they also noted that affordability was still a challenge and not enough passes were available.

The full benefits and costs of such programs are generally not being considered. Some informants noted that a full cost accounting of public transit costs/benefits – and of low income transit pass programs in particular – would illustrate significantly greater benefits than they are credited with. Most notably, benefits are typically construed as direct benefits reaching only those involved in the programs. However, some felt quite strongly that a complete, comprehensive cost-benefit analysis that considered health, educational, economic, and social impacts of these programs would illustrate their value. For example, key informants noted cases where millions of dollars have recently been spent on employment and training programs, but the very people these programs are designed to support are unable to access them because they lack the money required to take the bus. To our knowledge, no study has examined the costs and benefits of subsidizing discount transit fare programs in comparison to the (full) costs and benefits of health and other socio-economic factors that can be linked to program outcomes.



Closing Comments

All major municipalities across Canada have some sort of public transit system. Among these, most provide price discounts based on age and fare media (i.e. tickets, passes), some based on abilities, and fewer based on being a recipient of social assistance programs. Programs that specifically provide subsidies based on income are few – although increasing in number. There are numerous benefits to implementing these programs such as improving access to employment and programs/services. Given the increasing attention being drawn to disparities in income levels among Canadians, one can expect – or at least hope – that establishment of such programs will continue despite challenging budgetary circumstances faced by different levels of government.

One reason for the development of new programs is increasing recognition of the important role transportation plays in achieving quality of life. The importance of transportation is supported by results obtained from impact/evaluation studies done by three of the jurisdictions profiled in this report and from anecdotal remarks reported by all of them. All of the impact/evaluation studies, reported positive benefits for registrants of affordable transit programs.

While all of the programs faced challenges in their establishment, development and – for the older ones – ongoing operation, the work of community advocates and champions in government, the cooperation among partners from different government departments and from the community, and the ongoing commitment of municipal councils to support citizens with low incomes has enabled the programs to successfully address the challenges faced.

Public transit is an obvious focal point in terms of increasing the affordability of transportation, because it is owned by municipalities, is city- or region- wide, and is typically one of the most inexpensive modes of transportation, thus used by those with low incomes. However, accessibility and availability of transportation are important complements to affordability. Other, less-involved or alternative options, may address select transportation needs and deficiencies. Perhaps new partnerships and innovative initiatives – including ones that are inexpensive and solely focused on meeting the needs of low income patrons – will most effectively address the challenges people with low incomes face in moving around towns and cities.

The subsidies provided by programs discussed in this report – while greatly appreciated and of tremendous benefit to recipients – do not directly address **the core issue: poverty**. Income, which is tied to one's level of employment and the wages received, determines what is and is not affordable. Poverty, arising from low and insecure incomes is, at root, why affordable transit programs are necessary. Decent and full employment, fair minimum wages, secure and adequate incomes, and high occupational health and safety standards are likely much more effective in ensuring that transportation is affordable. While making transportation more affordable through the programs discussed in this report addresses some of the challenges faced by people with low incomes, such efforts are but one small step in addressing the underlying causes.

We close with two statements from key informants who were reflecting on the processes that would be involved in starting new affordable transit pass initiatives:

“This is not going to be easy...”

“The program *will be* a success.”

Together these comments encapsulate the challenges and accomplishments of the programs profiled in this report; as shared by the key informants. The first comment signifies the struggles involved in establishing and operating affordable transit programs – especially in circumstances where there is little

initial or ongoing support. The second comment points toward a real need for affordable transportation among people with low incomes. The question, then, is how to design program(s) that build on the successes described here to facilitate greater inclusion of all people in our community, society and economy to the benefit of us all.



References

- Acacia. (2006). Community pass customer survey project: An evaluation of Ottawa's transit services community pass pilot program. Acacia Consulting and Research.
- Bian, C. (2008, October). *City of Hamilton Affordable Transit Pass Program Six Month Pilot Evaluation*. Community Services Department, City of Hamilton.
<http://www.hamilton.ca/NR/rdonlyres/AA0F43CA-9FFB-4935-BFA3-1DC654324E1A/0/Nov14ECS08051REPORTAffordableTransit.pdf>
- Bian, Carmen. (2012, January). Community Services, City of Hamilton. Personal communication.
- Brimley, Erica. (2012, January). Community Services, City of Hamilton. Personal communication.
- Calgary Transit. (n.d.). Low Income Transit Pass webpage.
http://www.calgarytransit.com/html/low_monthly_income_pass.html
- Calgary Transit. (n.d.). Seniors Transit Pass webpage.
http://www.calgarytransit.com/html/senior_yearly_passes.html
- City of Guelph. (n.d.) *Subsidized Bus Pass for Adults with Disabilities; Subsidized Bus Pass to Grow*.
<http://guelph.ca/living.cfm?itemid=78458&smocid=2158>
- City of Guelph. (2011, July 12). Community & Social Services Committee Agenda
http://guelph.ca/uploads/Council_and_Committees/CSS/css_agenda_071211.pdf
- City of Guelph. (2011, October 12). City Council Agenda.
http://guelph.ca/uploads/Council_and_Committees/CSS/css_agenda_101211.pdf
- City of Guelph. (2011, December 19). City Council Agenda. Community & Social Services Committee Agenda. http://guelph.ca/uploads/Council_and_Committees/Council/council_agenda_121911.pdf
- City of Hamilton. (2007, November). *Affordable Transit Pass Program - Pilot Project [Report to Council]*. http://www.hamilton.ca/NR/rdonlyres/D04841BA-536A-4E5C-844F-6D399AB80E23/0/Nov26Affordable_Transit_REVISED_Nov23_20071.pdf
- City of Hamilton. (2008, October). *Affordable Transit Pass Pilot Program – Six Month Program Evaluation Results [Report to Council]*. <http://www.hamilton.ca/NR/rdonlyres/AA0F43CA-9FFB-4935-BFA3-1DC654324E1A/0/Nov14ECS08051REPORTAffordableTransit.pdf>
- City of Hamilton (2009, October). *Affordable Transit Pass 2009 Program Update [Report to Council]*. <http://www.hamilton.ca/NR/rdonlyres/2D954943-6802-407F-9638-2CB1F72C7FE6/0/Oct29Item81.pdf>
- City of Hamilton. (2010, December). *Affordable Transit Pass Pilot Program - Change in Status from Pilot to Permanent Program [Report to Council]*. http://www.hamilton.ca/NR/rdonlyres/D6D768E4-C67F-4FC0-94AC-E329A7A9D257/0/Dec14EDRMS_n101913_v1_7_4_CS10071aPW10100_Affordable_Transit_Pass_Pilot_Program.pdf
- City of Kingston. (2009, September 8). *Municipal Fee Assistance Program [Report to Environment, Infrastructure and Transportation Policies and Arts, Recreation and Community Policies committees]*. http://www.cityofkingston.ca/pdf/cityhall/committees/community/agenda/2009/ARC-EITP_Agenda-SchedA.pdf
- City of Kingston. (2011, November 9). *Municipal Fee Assistance Program Update [Information Report to Arts, Recreation & Community Policies Committee]*.
http://www.cityofkingston.ca/pdf/cityhall/committees/community/agenda/2011/ARC_A0811-11022.pdf

- City of Kingston. (2012). Municipal Fee Assistance Program. Application. http://www.cityofkingston.ca/pdf/social/MunicipalFeeAssistanceProgram_Application2012.pdf
- City of Windsor. (n.d.). *Affordable Pass Program website*, <http://www.citywindsor.ca/003796.asp>
- City of Windsor. (2011, May 10). *Transit Windsor Affordable Pass Program (APP) Application*. <http://www.citywindsor.ca/residents/transitwindsor/Fares/Documents/APP%20Application%20Form.pdf>
- Community and Health Services Department, York Region. (2011, December). Personal communication.
- Dempster, B. & Tucs, E. (2009). *Increasing Affordable Transportation Options in the Region of Waterloo: A Selection of Options*. Civics Research Co-operative. http://civics.ca/docs/afftrans_consult_report.pdf
- Dempster, B. (2009). *Increasing Transportation Affordability in Waterloo Region: A list of discounts, programs and services*. Civics Research Co-operative. http://civics.ca/docs/afftrans_investigate.pdf
- Dempster, B. (2009). *Investigating Affordable Transportation Options in the Region of Waterloo with a Focus on Public Transit*. Civics Research Co-operative. http://civics.ca/docs/afftrans_investigate.pdf
- Dempster, Beth. (2011, December). Civics Research Co-operative and TRIP Committee member. Personal communication.
- Department for Transport (DfT). (2004). Social exclusion and the provision of public transport - main report. London. <http://www.liftshare.com/business/pdfs/dft-social%20exclusion.pdf>
- Direction de Sante publique (DSP). (2006). *Urban Transportation, a question of health; 2006 Annual Report on the Health of the Population*. Montréal: Agence de la santé et des services sociaux de Montréal. <http://turcot.files.wordpress.com/2009/05/annualreport2006.pdf>
- Dirks, David. (2011, December). Waterloo Region Employment and Income Support and TRIP Committee member. Personal communication.
- Ellery, R. (2011, June 22) Greater Political, Public Focus Needed on Poverty.” *Guelph Mercury*. <http://www.guelphmercury.com/opinion/columns/article/552032--greater-political-public-focus-needed-on-poverty>
- Ellery, R., Coordinator, Guelph & Wellington Task Force for Poverty Elimination; Social Planning Associate, United Way of Guelph & Wellington. (2011, December). Personal communication.
- Ellery, R. & Peter, A. (2010). *Impact of Public Transit Fees on Low Income Individuals Families and Individuals in Guelph*. Guelph & Wellington Task Force for Poverty Elimination and Institute for Community Engaged Scholarship. http://gwpoverty.ca/wp-content/uploads/2011/02/Transit_Research_Feb_2011.pdf
- Federation of Canadian Municipalities (FCM). (2010). *Mending Canada's frayed social safety net: The role of municipal governments (Theme report #6)*. Quality of Life in Canadian Communities. http://www.fcm.ca/Documents/reports/Mending_Canadas_Frayed_Social_Safety_Net_The_role_of_municipal_governments_EN.pdf
- Federation of Canadian Municipalities (FCM). (n.d.-b). *Transit and Transportation*. <http://fcm.ca/home/issues/transit-and-transportation.htm>
- Federation of Canadian Municipalities (FCM). (2011). Member Communities website. <http://www.fcm.ca/home/programs/quality-of-life-reporting-system/member-communities.htm>
- Fellegi, Ivan P. (1997). On poverty and low income. Statistics Canada. <http://www.statcan.gc.ca/pub/13f0027x/13f0027x1999001-eng.htm>
- Government of British Columbia, Ministry of Social Development (BCMSD). (2011). Additional Assistance for British Columbians in Need webpage. <http://www.mhr.gov.bc.ca/programs/other.htm#bp>

- Government of Ontario. (2010, November 22). Breaking the Cycle; Ontario's Poverty Reduction Strategy. <http://www.children.gov.on.ca/htdocs/English/breakingthecycle/index.aspx>
- Government of Ontario. (2010, November 22). Breaking The Cycle: Ontario's Poverty Reduction Strategy; Important Changes to How Poverty Is Measured. <http://www.children.gov.on.ca/htdocs/English/breakingthecycle/report/2010/LIM2010.aspx>
- Government of Saskatchewan. (2005, December 19). News Release: Discounted Bus Passes Make Transit More Affordable. <http://www.gov.sk.ca/news?newsId=2e220ca8-73b7-4e72-9ce6-bba2fbd6ebbf>
- Government of Saskatchewan. (2011, February 15). News Release: Discounted Bus Pass Program Renewed Through September 2011. <http://www.gov.sk.ca/news?newsId=5db4ed30-e9b2-4d91-bcc0-86d9e10b65e5>
- Guelph & Wellington Task Force for Poverty Elimination. (2011, May). *The Guelph & Wellington Task Force for Poverty Elimination's Report to the Community*. <http://gwpoverty.ca/wp-content/uploads/2011/02/PTF-Report-to-the-Community.pdf>
- Guelph Tribune. (2011, July 12). Low-income bus users could see price break. <http://www.guelphtribune.ca/news/low-income-bus-users-could-see-price-break/>
- Guelph Tribune. (2011, October 11). Transit Changes Pushed to January. <http://www.guelphtribune.ca/news/transit-changes-pushed-to-january/>
- Hamilton Roundtable for Poverty Reduction (HRPR). (2007, February). *Making Hamilton the Best Place to Raise a Child: Hamilton Roundtable for Poverty Reduction ~ Starting Point Strategies*. <http://www.hamiltonpoverty.ca/docs/Starting%20Point%20Strategies.pdf>
- Hamilton Street Railway (HSR). (n.d.) Fares and Conditions webpage. <http://www.hamilton.ca/CityServices/Transit/Fares+and+Conditions/FaresandConditions.htm>
- HarGroup Management Consultants. (2007). *Low Income Transit Pass Outcomes Survey*. Calgary Transit/Vibrant Communities Calgary <http://www.vibrantcalgary.com/uploads/pdfs/low-income-transit-pass-outcomes-survey-final-report-august-18-2007.pdf>
- Hitchen, Cheryl, Manager, Social Planning and Policy, City of Kingston. (2011, December). Personal communication.
- Houad, Tony, Director, Corporate Services, Transit Windsor. (2011, December). Personal communication.
- Houston, Colleen. (2011, December). Disability Action Hall, Calgary. Personal communication.
- Kerr, Colin. (2011, December). Hamilton Street Railway, City of Hamilton. Personal communication.
- Kingston Community Roundtable on Poverty Reduction (KCRPR). (n.d.). Submission to the Social Assistance Review from the Kingston Roundtable on Poverty Reduction. <http://www.socialassistancereview.ca/uploads/File/Kingston-Community-Roundtable.pdf>
- Litman, Todd (2012) Evaluating Public Transportation Health Benefits. Victoria Transport Policy Institute for the American Public Transportation Association. 15 February 2012. http://www.vtpi.org/tran_health.pdf
- Makhoul, A. (2005). *Fair Fares Calgary Celebrates Reduced Fare Transit Passes*. Caledon Institute of Social Policy. <http://www.caledoninst.org/Publications/PDF/557ENG.pdf>
- Makhoul, A. (2008). *Fair Fares 2008: Roadblocks and Opportunities*. Caledon Institute of Social Policy. <http://www.vibrantcalgary.com/uploads/pdfs/fair-fares-2008.pdf>
- Makhoul, A. (2009). *Success for Fair Fares*. Caledon Institute of Social Policy. <http://www.vibrantcalgary.com/uploads/pdfs/calgary-fair-fares-2009.pdf>

- Muntaner, C., Ng, E. & Chung, H. (June 2012) *Better Health: An analysis of public policy and programming focusing on the determinants of healthy and health outcomes that are effective in achieving the healthiest populations*, Canadian Health Services Research Foundation.
http://www2.cna-aiic.ca/CNA/documents/pdf/publications/nec/BetterHealth_Muntaner-EN-Web.pdf
- Ontario Ministry of Community and Social Services (OMCSS). (2010). *Ontario Works Policy Directives, 7.1: Summary of Benefits*.
http://www.mcscs.gov.on.ca/en/mcscs/programs/social/directives/directives/OWDirectives/7_1_OW_Directives.aspx
- Pacaud, Bonnie. (2011, December). Fair Fares, Calgary. Personal communication.
- Pathway to Potential. (n.d.). Website, <http://pathwaytopotential.ca/>
- Pathway to Potential. (2010, January 25). Pathway to Potential: Windsor Essex County's Poverty Reduction Strategy; 2009 Report to the Community.
<http://www.pathwaytopotential.ca/docs/2009%20Report%20to%20Community%20-%20Pathway%20to%20Potential.pdf>
- Pathway to Potential. (2011, November). Pathway to Potential 2010 Community Report.
<http://www.pathwaytopotential.ca/docs/2010-Report-2011.pdf>
- Pearson, T. & Kelly, Y. (2010, April 10). *Behind the Masks: Testimonials from those marginalized by income - A Report on the Interfaith Social Assistance Reform Coalition (ISARC) Social Audit in York Region*. <http://www.yrfn.ca/pdf/ISARC%20Report%20September%20Final.pdf>
- Peters, A. & Shaw, C. (2010, December 20) *Report on The Task Force for Poverty Elimination "Success Stories" Project*. The Research Shop, University of Guelph.
<http://www.theresearchshop.ca/sites/default/files/Success%20Stories%20Project%20Report.pdf>
- Postma, Caroline, former city councilor and former chair of the Transit Windsor Board. (2011, December). Personal communication.
- Regional Municipality of Waterloo (RMOW). (2001a, June). *Transit Affordability and Accessibility* (Report No: P-01-085/SS-01-035).
- Regional Municipality of Waterloo (RMOW). (2001b, November). *Transit Affordability and Accessibility* (Report No: P-01-145/SS-01-073).
- Regional Municipality of Waterloo (RMOW). (2002, March). *Transit Affordability and Accessibility* (Report No: P-02-023/SS-02-023).
- Regional Municipality of Waterloo (RMOW). (2010, Sept). *Affordable Transportation Pilot* (Report No: SS-10-044). <http://www.regionofwaterloo.ca/en/regionalGovernment/resources/SA2010-0907.pdf>
- Regional Municipality of Waterloo, TRIP Committee (RMOW-TRIP). (2010). *Waterloo Region's Transit for Reduced Incomes Program (TRIP): Operating Principles and Procedures of the Waterloo Region Discount Bus Pass Program*, Region of Waterloo/Civics Research Co-operative.
- Roberts, Sandy. (2011, December). Grand River Transit and TRIP Committee member. Personal communication.
- Sadowski, H., & Chalmers, R. (2011). *Financial Barriers to Transit Access*. Edmonton Social Planning Council. <http://www.edmontonsocialplanning.ca/content/view/1023/1023>
- Shuttleworth, J. (Oct 07 2011) *Expanding Guelph Transit's low-income bus pass program considered*. GuelphMercury.com <http://www.guelphmercury.com/news/local/article/605930--expanding-guelph-transit-s-low-income-bus-pass-program-considered>

- Social Exclusion Unit (SEU). (2002). *Making the Connections: Transport and Social Exclusion: Interim findings from the Social Exclusion Unit*. Local Government Improvement and Development. <http://mtcwatch.com/pdfiles/3819-CO.pdf>
- Société de transport de Montréal (STM). (n.d.). STM Transportation Cocktail webpage. http://www.stm.info/English/info/a-cocktailtransport_09.htm
- Spencer, Jason. (2011, December). The Working Centre and TRIP Committee member. Personal communication.
- Springate, Erica. (2011, December). Waterloo Region Transportation Planning and TRIP Committee member. Personal communication.
- Statistics Canada. (2012). Low Income Cut-offs. <http://www.statcan.gc.ca/bsolc/olc-cel/olc-cel?catno=13-551-X&lang=eng>
- Stewart, M., & Reutter, L. (2004). *Left out: perspectives on social exclusion and social isolation in low-income populations*. The Social Support Research Program, University of Alberta. http://www.ssrp.ualberta.ca/pdf/left_out_public_report.pdf
- Toronto Board of Trade (TBT). (2010). *Lifting All Boats: Promoting Social Cohesion and Economic Inclusion in the Toronto Region*. http://www.bot.com/AM/Template.cfm?Section=Promoting_Social_Cohesion&Template=/CM/ContentDisplay.cfm&ContentID=4793
- Town of Banff. (2011). Programs for Low Income Residents Website. <http://www.banff.ca/locals-residents/public-transit-buses/programs-for-low-income-residents.htm>
- Tracey, S. (2011, October 25). Guelph to phase in increase for subsidized bus pass holders. *Guelph Tribune*. <http://www.guelphmercury.com/news/local/article/614868--guelph-to-phase-in-increase-for-subsidized-bus-pass-holders>
- Transit Windsor. (2011, May). Transit Windsor Affordable Pass Program (APP). <http://www.citywindsor.ca/residents/transitwindsor/Fares/Documents/APP%20Pamphlet.pdf>
- Tucs, E., Dempster, B. & Franklin, C. (2004). *Transit Affordability: a study focused on persons with low incomes in the Region of Waterloo*, Civics Research Co-operative/Region of Waterloo. <http://civics.ca/docs/transitaffordabilityreport.pdf>
- Vasey, Adam, Director, Pathway to Potential. (2011, December). Personal communication.
- Vibrant Communities Calgary. (2007). *Fair Fares Strategy Update*. <http://www.vibrantcalgary.com/uploads/pdfs/fairfaresstrategyupdatejan2007.pdf>
- Ward 2 Guelph: The Deuce. (2011, October 28). Pilot Project Offers Bus Pass Breaks. <http://ward2guelph.wordpress.com/2011/10/28/pilot-project-offers-bus-pass-breaks/>
- Warsh, R. (2011, May 16). *Report No. 3 of the Social Development, Health & Culture Standing Committee of Its Meeting Held May 11, 2011*. City of Windsor.
- WHO Regional Office for Europe (2003) Social determinants of health: the solid facts. 2nd edition/edited by Richard Wilkinson and Michael Marmot. http://www.globalhealtheurope.org/index.php?option=com_content&view=article&id=468:social-determinants-of-health-&catid=35:institutions&Itemid=55
- Wilson, Terry. (2012, January). Fair Calgary, City of Calgary. Personal communication.
- Windsor Star, Nov 25, 2010. *Low income riders get break on Transit Windsor bus passes*. <http://www2.canada.com/windsorstar/news/story.html?id=950e290c-5920-47fc-9ae1-f1c79bb26d5d>
- Withall, J., Jago, R., & Fox, K. R. (2011). Why some do but most don't. Barriers and enablers to engaging low-income groups in physical activity programmes: a mixed methods study. *BMC Public Health*, 11(507). <http://www.biomedcentral.com/1471-2458/11/507>

- World Health Organization (2008) Closing the gap in a generation: health equity through action on the social determinants of health: final report of the commission on social determinants of health.
http://www.searo.who.int/LinkFiles/SDH_SDH_FinalReport.pdf
- York Region. (2007). York Region Sustainability Strategy: Towards a Sustainable Region.
<http://www.york.ca/NR/rdonlyres/ddvav3nrw2657f4dljc4m3kba4v35qzqdtw62f3zce5cvwur4wbeymuvnoobehvgdkpzgsjrzeohstbduin2jlsmd/Final+Sustainability+document.pdf>
- York Region. (2007). York Region Community and Health Services Department Multi-Year Plan: Investing in Our Communities 2010-2015.
<https://www.york.ca/NR/rdonlyres/braidy5r12j54wuqfjt25qfnie2a4yxuc6t5sz3vneybivfcqb3xz3xjbcngqm5x4w7sm3a56vx7f7bunyc44uu2se/Multi-Year+Plan+for+CHS+2010-2015.pdf>
- York Region. (2010a, January 21). *Update on Fare Subsidy Requests Report No. 1 of the Transportation Services Committee.*
<http://www.york.ca/NR/rdonlyres/jcm4mg15ae7s3agk7wwgkgecb5ej7c4bi5tz4lg6euy35j26dcrj5oagxn6er3cdewihu6vxk2pxpunn7rzt2ktdqh/rpt+1+cls+2.pdf>
- York Region. (2010b) *Community Soundings Invitation*
<http://york.ca/NR/rdonlyres/oo5qz3x4ef2i6ane2kj6wve25o2us5pdbbweileqbk3qzye3vujgpo5vmsk4brn53372d6cucohhmtql6phvaoxduf/sep+22+mcneil.pdf>
- York Region. (2011a, February 17). *Transit Fare Subsidy Requests Update, Report No. 2 of the Community and Health Services Committee.*
<http://york.ca/NR/rdonlyres/ajjxcq4c2fkukddx5jczwrlagzuni4v7gu77krnlhmiy5jntfimi5vpr4onaqwiuhw3vp3mp65uai547gjf4gu32b/rpt+2+cls+2.pdf>
- York Region. (2011b, October 20). *Transit Fare Subsidy Pilot Program, Report No. 8 of the Community and Health Services Committee.*
<http://www.york.ca/NR/rdonlyres/i4ldkoedyfgsfz724zr6npgks7lbzoxjairsfhhbvve4eop4zcmukllvquakmskv25dmmcnoc3aweqvfevwji67axda/rpt+8+cls+4.pdf>
- York Region. (2011c, October 20). Media Release: *York Region pilots new transit subsidy program.*
<http://www.york.ca/Publications/News/2011/October+20,+2011+York+Region+pilots+new+transit+subsidy+program.htm?ODA=1>
- York Region Alliance to End Homelessness. (2008, August). *Needs Assessment: Transportation Access of Homeless and Under Housed in York Region.*
<http://www.yraeh.ca/~yraeh/sites/default/files/userfiles/YRAEH-Transportation-Needs-Assessment-Aug08.pdf>
- York Region Alliance to End Homelessness. (2009, July). *Final Report: Homelessness Partnering Initiatives Transportation Project (Year One)*
<http://www.yraeh.ca/~yraeh/sites/default/files/userfiles/2009%20Transportation%20Final%20Report%20FINAL.pdf>
- York Region Alliance to End Homelessness. (2011, December). Personal communication.
- York Region Food Network. (2012, January). Personal communication.
- York Region Transit. (n.d.). Website, fares page. <http://www.yrt.ca/en/farespases/prices.asp>
- York Region Transit Committee. (2008). York Region transit community-based social services discount pilot program (No. 6). York Region.
<http://www.york.ca/NR/rdonlyres/lbjxz7hgzkz3asyqxppoih3v7cua5vwvusrj4kvht6g7psm3epgyrru7qhbzxfrkkjnbz25zmh6eeakeyxj6vzi6c/rpt+6+cls+6.pdf>



Appendices

Appendix 1: List of Key Informants and Other Contacts

The window for data-gathering for this report, most notably for interviews, was very short (December 2011). As a consequence, it was not possible to interview people from all relevant departments in all cases. This appendix provides a list of those who were interviewed.

Region of Waterloo

- David Dirks, Waterloo Region Employment and Income Support and TRIP Committee member
- Erica Springate, Waterloo Region Transportation Planning and TRIP Committee member
- Jason Spencer, The Working Centre and TRIP Committee member
- Sandy Roberts, Grand River Transit and TRIP Committee member

City of Calgary

- Colleen Houston, Disability Action Hall, Calgary
- Bonnie Pacaud, Fair Fares, Calgary
- Terry Wilson, Fair Calgary, City of Calgary

City of Hamilton

- Carmen Bian, Community Services, City of Hamilton
- Erica Brimley, Community Services, City of Hamilton
- Colin Kerr, Hamilton Street Railway, City of Hamilton

City of Kingston

- Cheryl Hitchen, Manager, Social Planning and Policy, City of Kingston

City of Windsor

- Tony Houad, Director, Corporate Services, Transit Windsor
- Caroline Postma, former city councilor and former chair of the Transit Windsor Board
- Adam Vasey, Director, Pathway to Potential

York Region

- Community and Health Services Department, York Region
- York Region Alliance to End Homelessness
- York Region Food Network

City of Guelph

- Randalin Ellery, Coordinator, Guelph & Wellington Task Force for Poverty Elimination; Social Planning Associate, United Way of Guelph & Wellington

Other contacts

City of Montreal

- Société de transport de Montréal
- Ministère de l'Emploi et de la Solidarité sociale - Québec

City of Vancouver

- TransLink, Vancouver
- Access Transit, Vancouver
- Community Resource Centre; Motivation, Power and Achievement Society

Appendix 2: Canadian Programs Directed Toward Increasing the Affordability of Public Transit for People with Low Incomes

This appendix includes four tables that compare discount transit programs in Canadian jurisdictions. Table 1 (covering two pages) lists information on the seven jurisdictions profiled in this report. Table 2 lists eight other jurisdictions with discount transit pass programs directed specifically toward people with low incomes. Table 3 lists additional discount transit pass programs, including those directed toward people with disabilities, seniors, and children. Table 4 lists discount ticket programs.

Table 1: Canadian discount transit pass programs for people with low incomes

Jurisdiction/Program	Start Date	Type	Eligibility ^a	Price for Patrons	Discount (%)	# Patrons	Population ^b	Population ^b LICO-AT
Canadian jurisdictions profiled in report.								
Waterloo Region – Transit for Reduced Income Program	2002	monthly pass	LICO-BT	\$35	44%	approx 2000; waiting list of 1000	451,235 (CMA)	35,196 (7.8%)
Waterloo Region – Transit Assistance Pass Program	2010	monthly pass	OW and education	free		300-400	451,235 (CMA)	35,196 (7.8%)
Calgary – Low-Income Monthly Transit Pass Program	2005	monthly pass	75% LICO-BT	\$40	57%	10,000	1,079,310 (CMA)	111,169 (10.3%)
Hamilton – Affordable Transit Pass Program	2008	monthly pass	LICO-AT/OW/ODSP and working	\$43.50	50%	approx 500	504,559 (city)	70,638 (14.0%)
Kingston – Affordable Transit Pass (part of Municipal Fee Assistance Program)	2009	monthly pass	LICO-AT	\$46.50 (adult) \$34.25 (youth) \$31.50 (senior)	32% 50% 54%	not available	117,207 (city)	13,010 (11.1%)
Windsor – Affordable Pass Program	2011	monthly pass	LICO-AT	\$40	49% (adult) 27% (student)	approx 800	216,473 (city)	30,739 (14.2%)
York Region – Transit Fare Subsidies (Pilot)	2012	monthly pass	OW/ODSP and working	\$57.50	50%	up to 1400	892,712 (Region)	87,486 (9.8%)
Guelph – Subsidized Bus Pass for Adults (with low incomes) Pilot Program	2012	monthly pass	LIM	\$36 (adult) \$31 (youth) \$30 (senior)	50%	to be determined	114,943 (city)	9,540 (8.3%)

^a LICO = Low Income Cut-Off; AT/BT = After/Before Taxes; LIM = Low Income Measure; OW = Ontario Works; ODSP = Ontario Disability Support Program

^b Numbers are from the 2006 Census for the area most closely matching that covered by the program discussed
CMA = Central Metropolitan Area

Table 1 (continued)

Jurisdiction/Program	Cost	Funding Source	Allocation	Partners - establishment	Partners - operation	Other
Waterloo Region – Transit for Reduced Income Program	2012: \$746,000	municipal tax levy and gas tax revenue	Employment and Income Support	Employment and Income Support, Transit Development Planning, Grand River Transit, The Working Centre, Lutherwood, community groups	Employment and Income Support, Transit Development Planning, Grand River Transit, The Working Centre, Lutherwood	honour-based application through community agencies; evaluation in 2004
Waterloo Region – Transit Assistance Pass Program	2012: \$300,000	municipal tax levy (initially also OMCSS)	Employment and Income Support	Employment and Income Support, Transit Development Planning, Grand River Transit, The Working Centre, Lutherwood	Employment and Income Support, Grand River Transit	
Calgary – Low-Income Monthly Transit Pass Program	2011: approx \$2 million	municipal tax levy	Calgary Transit	City transit and social services departments; Fair Fares	Calgary Transit; feedback from Fair Fares	evaluation in 2007, positive results
Hamilton – Affordable Transit Pass Program	2011: \$300,000 and \$103,000 (includes admin)	Hamilton Social Services Initiative Reserve Fund and OMCSS	Community Services Department; Hamilton Street Railway (admin only)	Community Services Department; some consultation with Transit Sub-Committee and Hamilton Roundtable for Poverty Reduction	Community Services Department; some Public Works; some consultation with Transit Sub-Committee and Hamilton Roundtable for Poverty Reduction	evaluation in 2008, positive results
Kingston – Affordable Transit Pass (part of Municipal Fee Assistance Program)	2010: \$165,000	municipal tax levy	Kingston Transit	Mayor's Task Force on Poverty, Kingston Community Roundtable on Poverty, Kingston Transit, Community and Family Services	Kingston Transit, Community and Family Services	no cap; Municipal Fee Assistance Program also provides for recreation discounts
Windsor – Affordable Pass Program	2012 \$125,000 (\$375,000 allocated)	Windsor's Pathway to Potential Fund	Transit Windsor	Pathway to Potential, City of Windsor, Transit Windsor, Voices against Poverty	Pathway to Potential, City of Windsor, Transit Windsor, Voices against Poverty	no cap on program; seniors pass is also \$40
York Region – Transit Fare Subsidies (Pilot)	2012 \$1,327,400, (includes admin)	York Region Social Assistance Reserve Fund	Community and Health Services	Community and Health Services and Transportation Services Departments, local municipalities, ODSP (York Region Office)	Community and Health Services and Transportation Services Departments, local municipalities	pilot to begin in early 2012
Guelph – Subsidized Bus Pass for Adults (with low incomes) Pilot Program	2012: estimated at \$135,350	municipal tax levy	Unknown	Guelph & Wellington Task Force for Poverty Elimination, Community Voices, Guelph Transit, Community and Social Services	Guelph Transit, Guelph Operations, Guelph Community and Social Services	no cap; 2 year pilot

Table 2: Canadian discount transit pass programs for people with low incomes

Jurisdiction/Program	Type	Eligibility	Price for patrons	Discount	# Patrons
Canadian jurisdictions not profiled in report.					
Banff – Low Income Transit Pass	monthly pass	LICO	free	100%	
Cornwall – Community Pass	monthly pass	ODSP or OW	\$34	58%	150
Halton Region – Subsidized Passes for Low Income Transit	monthly pass	LICO-BT but not OW/ODSP	\$30-\$47 (varies by municipality)	+/- 50%	437 for pilot
Moose Jaw – Reduced Fare Pass	monthly pass	social assistance	\$20	66%	
Regina – Reduced Pass	monthly pass	people receiving social assistance	\$20	68%	
Saskatoon – Discounted Bus Pass Program (Low Income)	monthly pass	LICO-BT or social assistance	\$64	15%; similar discount for youth	
Victoria, BC – Bus Pass Program	monthly pass	agencies -> people with low incomes	free	100%	1200 passes

Table 3: Canadian discount transit pass programs for people with low incomes that are seniors, children or people with disabilities

Jurisdiction/Program	Type	Eligibility	Price	Discount
Programs for Seniors				
Banff – Low Income Transit Pass	monthly pass	seniors with low income	free	100%
Calgary –Seniors Pass	annual pass	seniors	\$35	97%
Calgary – Low-Income Seniors Pass	annual pass	seniors with low income	\$15	99%
Edmonton – Seniors Pass	monthly pass	Seniors	\$13	85%
Edmonton – Seniors Annual Pass	annual pass	seniors	\$118	88%
Edmonton –Low-Income Seniors Annual Pass	annual pass	seniors with low income	\$51	95%
Hamilton – Seniors Pass Program	annual pass	seniors	\$205	80%
Hamilton – Low Income Seniors Pass Program	annual pass	seniors with low income	free	100%
North Bay – Reduced Pass	monthly pass	seniors or people with disabilities	\$55	31%
Ottawa – Limited Free Transit for Seniors	free transit	seniors	Monday and Friday afternoons, all day Wednesday	
Ottawa - Seniors Pass	monthly pass	seniors	\$37	61%
Regina – Seniors Pass	annual pass	seniors	\$202/yr	73%
Saskatoon – Discounted Bus Pass Program (Senior)	monthly pass	senior	\$25	67%
Strathcona – Annual Seniors Pass	annual pass	seniors with low income	\$141.25/yr	87%
Strathcona – Off-Peak Seniors Pass	free pass	seniors with low income	M-F, 9-3 and after 6pm; anytime weekends/holidays in Sherwood Park only	
Sudbury – Older Adult Bus Pass	monthly pass	55 years +	\$45	39%
BC – BC Bus Pass	annual pass	seniors with low incomes	\$45/yr	95%
Windsor – Seniors Pass	monthly pass	seniors	\$40	49%
York Region – Senior	monthly pass	senior	\$50	57%

Table 3 (continued)

Jurisdiction/Program	Type	Eligibility	Price	Discount
Programs for people with disabilities (Note: People with disabilities are eligible for all programs listed in Table 1 excepting Halton.)				
Durham Region – Access Pass	monthly pass	ODSP	\$39	60%
Edmonton – AISH Subsidized Transit Pass Program	monthly pass	AISH (people with disabilities)	\$33	61%
North Bay – Reduced Pass	monthly pass	seniors or people with disabilities	\$55	31%
Ottawa – Community Pass	monthly pass	ODSP	\$32	66%
Sudbury – Disability Pensioners' Bus Pass	monthly pass	disability (including child, senior, War Veteran, CNIB)	\$45	39%
BC – BC Bus Pass	annual pass	people with disabilities	\$45/yr	95%
Programs for children				
York Region – Child	monthly pass	child (6-12)	\$50	57%
North Bay – Child Term Pass	term pass	student to end of Grade 8	\$190 (fall term), \$280 (winter/spring term)	42%

Table 4: Canadian discount transit ticket programs

Jurisdiction/Program (programs in bold are profiled in main section of report)	Type	Eligibility	Price for patrons	Price for community agencies
Calgary – Transit Ticket Program	tickets	agencies → people with low incomes	free	
Victoria, BC – Bus Ticket Program	tickets	agencies → people with low incomes	free	50% discount (\$11.25 for book of ten tickets)
Waterloo Region – Ticket Program	tickets	agencies → people with low incomes	free	11% discount (\$8.25 for book of five tickets)
York Region – Transit Fare Subsidies (Pilot)	tickets	agencies → people with low incomes	free	\$2500 available to agencies for purchasing tickets