



CITY OF HAMILTON

PUBLIC WORKS DEPARTMENT
Transportation, Energy & Facilities Division

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| TO: Chair and Members Public Works Committee | WARD(S) AFFECTED: CITY WIDE |
| COMMITTEE DATE: February 6, 2012 | |
| SUBJECT/REPORT NO: Transit Fare Waiver and Equipment Use Policy (PW12008) - (City Wide) | |
| SUBMITTED BY: Gerry Davis, CMA General Manager Public Works Department | PREPARED BY: Nancy Purser Manager, Transit Support Services (905) 546-2424 Extension 1876 |
| SIGNATURE: | |

RECOMMENDATION:

That the Transit Fare Waiver and Equipment Use Policy, attached as Appendix "A", to this report be approved for implementation.

EXECUTIVE SUMMARY

Staff has received a number of requests for free transit and/or shuttle service for specific events. As Staff does not have the authority to approve such requests, most are now being directed to the Clerks office with the request being heard directly by Committee.

The attached policy is intended to streamline the process by providing specific criteria and eligibility factors in determining the merit of the request. This policy will allow the organization to complete an application form that can then be assessed by staff. The intent is to follow similar practices laid out in the policy and guidelines for the Community Partnership Program and the Recreation Fee Waiver Policy.

The general guidelines of this policy are as follows:

- Fees will not be waived or equipment provided for an applicant that has an overdue amount owing to the City.
- If the organization is a recipient of a grant through the Community Partnership Program, or any other grant received from the City of Hamilton, and

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transportation was not included in the event budget, then no transit fare waiver will be considered.

- All requests for shuttle services (Charters) are dependant on the availability of equipment and operators, regular scheduled service must not be impacted.
- Rural communities shall each be entitled to shuttle service for one annual community agricultural event.

Alternatives for Consideration - See Page 4

FINANCIAL / STAFFING / LEGAL IMPLICATIONS

Financial: There are no financial implications as this will be funded through the current operating budget.

Staffing: None

Legal: None

HISTORICAL BACKGROUND

The process for requesting shuttles and free transit has evolved over the last few years. Currently all requests are directed to the Clerks office for placement on the next available Committee agenda. While the event itself has been scheduled well in advance, there are instances where the request for shuttle service and/or free fares are brought to Committee with such short notice that it does not allow for the necessary lead times required to properly plan and schedule for these events. The short turn around to provide shuttles for significant events, has led to higher costs, cancelled regular service and transportation plans that have unacceptable passenger and pedestrian risk.

POLICY IMPLICATIONS

This report presents a new Transit Fare Waiver and Equipment Use Policy for the consideration of Council.

RELEVANT CONSULTATION

N/A

ANALYSIS / RATIONALE FOR RECOMMENDATION

Staff is receiving increasing requests for free transit and/or shuttle service for special community events. As Transit staff does not have the authority to approve such requests, they are being directed to the Clerks office with the request being heard directly by Committee. Often the requests are made with little lead time for implementation.

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This policy respects Council's current demands related to agenda management.

- Provides for a clear, concise, and consistent means for Council to address transit fare waivers and equipment use requests to groups throughout the City.
- Allows groups to determine their eligibility in advance.
- Refers the day-to-day administration to staff.
- Provides Council with the accounting of funds allocated to fee waivers and equipment use requests.

This policy has been developed utilizing the processes approved for the Community Partnership Program and Recreation Fee Waiver Policy. All requests will be reviewed by staff ensuring that the requestor meets all of the general guidelines including:

- Fees will not be waived or equipment provided for an applicant that has an overdue amount owing to the City.
- If the organization is a recipient of a grant through the Community Partnership Program, or any other grant received from the City of Hamilton, and transportation was not included in the event budget then no transit fare waiver will be considered.
- The request is received a minimum of six (6) months in advance.
- All requests for Charters or Shuttle service are dependent on the availability of buses and operators, regular scheduled service must not be impacted.

The policy defines three different request types:

- Charter requests - fee per hour of equipment/operator use
- Shuttle service - free equipment and fares
- Free access to regular service

Transit staff will further review the request to determine if the specific eligibility criteria have been met, including:

- Must be within the City of Hamilton boundaries
- Must be a one time or annual event that is of significant value to the community
- Must submit a draft traffic and transit plan with application
- Must be non profit organization
- Must be non admission event, free parking
- Must contribute to the well being of the community

The Transit section has been staffed and equipped to provide the Conventional Transit Service Levels as approved by Council annually. As the City's festivals and special events grow, the ability to provide extra service through charters and shuttles puts a strain on the regular service. As there is an expectation of regular users of conventional transit that the service will not be interrupted, it is important to weigh all criteria of requests through staff review prior to approval.

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The implementation of this policy will not only allow for clearer guidelines for approving requests, it will also provide Transit planning staff sufficient time to incorporate additional service requirements in a safe and effective manner, without disruption to our regular service.

The disposition of all requests will be reported to Council through the Grants Sub-Committee.

ALTERNATIVES FOR CONSIDERATION:

Continue following the current process of having all requests go through the Clerks department to be placed on the next available Committee agenda.

CORPORATE STRATEGIC PLAN

Focus Areas: 1. Skilled, Innovative and Respectful Organization, 2. Financial Sustainability, 3. Intergovernmental Relationships, 4. Growing Our Economy, 5. Social Development, 6. Environmental Stewardship, 7. Healthy Community

Financial Sustainability

- Financially Sustainable City by 2020
- Effective and sustainable Growth Management
- Delivery of municipal services and management capital assets/liabilities in a sustainable, innovative and cost effective manner

Growing Our Economy

- An improved customer service

Social Development

- Residents in need have access to adequate support services
- People participate in all aspects of community life without barriers or stigma

Environmental Stewardship

- Reduced impact of City activities on the environment

Healthy Community

- An engaged Citizenry

APPENDICES / SCHEDULES

Appendix "A" - Transit Fare Waiver/Equipment Usage Eligible Applicant Criteria Policy



2200 Upper James Street,
Mount Hope, ON
L0R 1W0

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|----------------------|---|
| <i>IMS Title:</i> | <i>Transit Fare Waiver / Equipment Usage Eligible Applicant Criteria Policy</i> |
| <i>IMS #:</i> | <i>PW-TR-OP-008</i> |
| <i>No. of Pages:</i> | <i>3</i> |
| <i>Issue Date:</i> | |
| <i>Created by:</i> | <i>Nancy Purser</i> |

1. PURPOSE

1. The purpose of the Fare Waiver / Equipment Usage Eligible Applicant Criteria set out herein is to assist staff, community organizations/groups and individuals, in responding to requests for waiving the Council approved Transit Fares in accordance with the Transit Fare Waiver Policy and to request additional service levels for special events.

2. SCOPE

- 1.1. There are three distinct areas covered by this policy:
 - 1.1.1. Charter requests – fee per hour of equipment / operator use
 - 1.1.2. Shuttle service – free equipment and fares
 - 1.1.3. Free access to regular service
- 1.2. The following criterion has been established to aid in responding to the many individuals and organizations requesting transit fares to be waived and/or for equipment use. However, meeting all criteria does not guarantee that equipment will be provided and/or the transit fare will be waived.
 - 1.2.1. General Criteria:
 - Rural Communities shall each be entitled to shuttle service for one annual community agricultural event.
 - Fares will not be waived or equipment provided for an applicant that has an overdue amount owing to the City.
 - If the organization is a recipient of a grant through the Community Partnership Program, or any other grant received from the City of Hamilton, and transportation was not included in the event budget, then no transit fare waiver will be considered.
 - All requests for Charters or Shuttle service are dependant on the availability of buses and operators, regular scheduled service must not be impacted.

- All applications must be submitted a minimum of six (6) months in advance, to allow for proper review and approval.
- Category 1 - Equipment Use
 - This is generally a request for special event shuttle service or charter service
 - Requires additional scheduling of buses and operators in excess of the Council approved service hours
 - Transit fares may also be waived
 - Transit revenue loss
 - Eligibility
 - Must be within the City of Hamilton boundaries
 - Must be a one time or annual event that is of significant value to the community
 - Must submit a draft Traffic and Transit plan with application
 - The event must have received approval from the Special Events Advisory Team
- Category 2 – Transit Fare Waiver
 - This is a request for free access to the HSR regular service in the form of monthly passes or tickets for a specific group to be utilized for a specific day or over the course of few months.
 - Transit revenue loss
 - Eligibility
 - Must satisfy at least two of the following:
 - Non profit organization
 - Educational experience for youth
 - Contributes to the well being of the community
- Ineligibility
 - The following organizations and/or events are not eligible for Shuttle service or fare waivers:
 - For Profit Organizations
 - Admission events
 - Events where parking is charged

3. DEFINITIONS

4. RESPONSIBILITY

The Director of Transit is responsible to ensure this procedure is communicated to all appropriate personnel and is implemented in the Transit Section.

Managers or designates are responsible to ensure that the procedure is followed in their respective Sections.

5. PROCEDURE

Applications made under this policy will be forwarded to Manager, Transit Support Services for initial review.

Requests for equipment will be forwarded to the appropriate Transit staff to confirm availability of equipment and bus operators to satisfy the request. The request will also determine if the appropriate traffic and transit plan is submitted. Should it be determined that Transit can not meet the request, the applicant will be notified that the request will not be approved.

Manager, Transit Support Services will confirm that the applicant meets the general criteria.

The Manager, Transit Support Service will advise the applicant of the outcome of the committee's review.

A report, as required, including all requests and dispositions will be forwarded to the Grants sub-committee for inclusion in its report to Council.

6. ASSOCIATED DOCUMENTS

Transit Fare Waiver / Equipment Use Request Application

7. REVISION HISTORY

Revision No.: 0

Date of Last Revision: _____

Last Approval Date: _____

Reason for Change: _____

Prepared by: (Print Name) Nancy Purser

Prepared by: (Signature) _____

Authorized by:
Director's Name (Print Name) Don Hull

Director's Signature: _____

TRANSIT FARE WAIVER / EQUIPMENT USE REQUEST APPLICATION

Date of application:
(dd/mm/yyyy)

Note: Group(s) completing this application MUST meet all criteria. Applications must be received a minimum of six (6) months prior to the event to allow for processing and scheduling.

Section A: Contact Information

Name of the organization: _____ Address: _____
 Contact Person: _____ Position in Organization: _____
 Phone Number (Day): () - Phone Number (Evening): () -
 E-mail address: _____ Fax Number: () -

Section B: Eligible Organizations

Not-for-Profit Organization operating in the City of Hamilton

Section C: Purpose of the Event - Please Check the Applicable Box.

- Community Festival
- Environmental Promotional Event
- Volunteer Youth Training
- Community Agricultural Event
- Other (explain) _____

The following is ineligible for shuttle service or fare waiver:

- Admission Events
- Event parking fee

Section D: Does this Organization receive a Grant from the City? Yes No

Please indicate the type and the amount of the Grant \$

Please indicate the amount of Grant to be allocated for Transit use \$

Section E: Equipment Request

| | | |
|---|------------------------|-----------------------|
| Event Date(s): | Time(s): | Fee Charged: (if any) |
| Event Location: | Traffic Plan Attached: | YES NO |
| Event Approved by Special Events Advisory Committee (SEAT): | YES | NO |
| Describe the Event: | | |

Describe the Service Requirement:

| Section F: Fare Waiver Request | | | |
|---|---|---------------------------------|--------------|
| Date(s): | Time(s): | Fee Charged: (if any) | |
| Describe the Service Requirement: | | | |
| | | | |
| | | | |
| Fare Requesting to be Waived | Charter Rate | Monthly Pass | Single Rides |
| | | | |
| For Fare Waiver requests, please provide details of how your organization or event meets the following criteria: | | | |
| Non profit organization: | | | |
| Educational experience for youth: | | | |
| Contributes to the well being of the community: | | | |
| X..... | | X..... | |
| Applicant's Name (print) | | Applicant's Signature | |
| For Department Use Only | | | |
| Gross Cost per Hour: Total Hrs _____ \$ | Fee Waiver: <input type="checkbox"/> Approved <input type="checkbox"/> Denied | | |
| Add Any Other Costs: \$ | Amount Waiver: \$ | | |
| Total Cost For Event: \$ | Account Number: | | |
| X..... | | Date Approved: | |
| Reviewer's Signature | | Date Denied: | |
| <u>INTERNAL COMMENTS:</u> | | X..... | |
| | | Manager's Signature | |
| | | X..... | |
| | | Director's Signature - Approval | |