

CITY OF HAMILTON

PUBLIC WORKS DEPARTMENT
Transportation, Energy & Facilities Division

TO: Chair and Members Public Works Committee	WARD(S) AFFECTED: CITY WIDE
COMMITTEE DATE: June 18, 2012	
SUBJECT/REPORT NO: Transit Fare Waiver and Free Equipment Use Policy (PW12008a) - (City Wide)	
SUBMITTED BY: E. (Beth) Goodger Acting General Manager Public Works Department	PREPARED BY: Don Hull Director of Transportation (905) 546-2424, Extension 1860
SIGNATURE:	Nancy Purser Manager, Transit Support Services (905) 546-2424, Extension 1876

RECOMMENDATION

That the Transit Fare Waiver and Free Equipment Use Policy, attached as Appendix "A" to Report PW12008a, be approved for implementation.

EXECUTIVE SUMMARY

Staff annually receives a number of requests for free transit service for specific events. As 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 Public Works Committee. Often, the requests do not have sufficient lead time prior to the event to be referred to Staff for a report.

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 requesting organization to complete an application form that can then be assessed by staff for eligibility. 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 essence of the policy is as follows:

- Some events, as listed in the attached policy, for which there is current operating budget will continue to receive shuttle service, subject to annual budget approval;

**SUBJECT: Transit Fare Waiver and Free Equipment Use Policy
(PW12008a) - (City Wide) - Page 2 of 4**

- Staff will screen-out applicant requests and may deny the request based upon the eligibility criteria contained in the attached policy, in essence being:
 - An applicant that has an overdue amount owing to the City is ineligible;
 - An organization in receipt of a grant through the Community Partnership Program, or any other grant received from the City of Hamilton, is ineligible;
 - Private-for-profit, fee for admission, and paid parking events are ineligible;
- All requests for shuttle services (Charters) as per Council's approved hourly rate are dependant on the availability of equipment and operators, such that regularly scheduled transit service is not cancelled.

Alternatives for Consideration - See Page 3

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 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 many instances where the requests for free service 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 Free Equipment Use Policy for the consideration of Council.

RELEVANT CONSULTATION

Tony Tollis, City Treasurer recommended that a budget be set and the types of programs approved through the Community Partnership Program be reviewed.

ANALYSIS / RATIONALE FOR RECOMMENDATION

Staff is receiving increasing requests for free transit service. 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.

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 free 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 free equipment use requests.
- This policy has been developed utilizing the processes approved for the Community Partnership Program and Recreation Fee Waiver Policy.

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.

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.

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

**SUBJECT: Transit Fare Waiver and Free Equipment Use Policy
(PW12008a) - (City Wide) - Page 4 of 4**

- 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 Citizen

APPENDICES / SCHEDULES

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



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

<i>IMS Title:</i>	<i>Transit Fare Waiver / Free Equipment Usage Eligible Applicant Criteria Policy</i>
<i>IMS #:</i>	<i>PW-TR-OP-XXX</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 / Free 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 and free Transit service in accordance with the Transit Fare Waiver Policy.

2. SCOPE

2.1 There are three distinct areas covered by this policy:

- 2.1.1 Charter requests – Council approved hourly rate
- 2.1.2 Free equipment and/or free fares
- 2.1.3 Free access to regular service

2.2. The following previously approved events will continue to be provided with shuttle service; however an application form must be completed as detailed in the policy:

- Ancaster Fair
- Rockton Fair
- Binbrook Fair
- Winona Peach Festival
- Annual Transforming & Revitalizing Downtown Summit
- Canada Day Shuttle
- Hamilton Veterans Parade
- Earth Day Shuttles
- Festival of Friends
- Eco Fest Shuttles
- Amity Goodwill – Taste of Downtown
- Kirkendall Food Drive

This list shall be reviewed annually and revised if necessary.

2.3 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 free equipment use. However, meeting all criteria does not guarantee that equipment will be provided and/or the transit fare will be waived.

2.3.1 General Criteria:

- 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 cancelled.
- 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 and requires additional scheduling of buses and operators in excess of the Council approved service hours

- Transit fares may also be waived resulting in Transit budgeted 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 passes or tickets for a specific group to be utilized for a specific day or over the course of a few months resulting in foregone revenue

➤ Eligibility

- Must satisfy at least two of the following:
 - Non profit organization
 - 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

None.

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.

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

The Manager, Transit Support Services will advise the applicant of the outcome of the committee's review and that they may appeal the staff decision to Public Works Committee through a delegation request.

6. ASSOCIATED DOCUMENTS

Transit Fare Waiver / Free 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 / FREE 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.....
Applicant's Name (print)

X.....
Applicant's Signature

For Department Use Only

Gross Cost per Hour: Total Hrs _____ \$
 Add Any Other Costs: \$
 Total Cost For Event: \$

Fee Waiver: Approved Denied
 Amount Waiver: \$
 Account Number:

X.....
Reviewer's Signature

Date Approved:
 Date Denied:

INTERNAL COMMENTS:

X.....
Manager's Signature

X.....
Director's Signature - Approval