

# Affordable Transit Pass Programs for Low Income Individuals: Options and Recommendations for the City of Winnipeg

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July 22, 2016



AFFORDABLE TRANSIT PASS PROGRAMS FOR LOW INCOME INDIVIDUALS:  
OPTIONS AND RECOMMENDATIONS FOR THE CITY OF WINNIPEG

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**INTRODUCTION**

Accessible and affordable transportation for low-income individuals and families has been demonstrated to create economic and social benefits for not only those experiencing low income, but for society as a whole. A majority of Canadian cities have either fully implemented, or are piloting, affordable public transit passes for people living in low-income. Winnipeg currently has discount pass options for seniors and in September, 2016, will be implementing a UPASS program for students. These two discount programs recognize that cities can play an important role in meeting the transportation needs of people with fixed or lower incomes.

Winnipeg considered implementing an affordable transit pass (ATP) program in 2010. At the time, Transit Finance Manager Carrie Erickson wrote, “a transit system that is accessible to all Winnipeggers is an important contributor to employment and economic opportunity” (Kives, 2010). On March 24, 2010, Winnipeg City Council voted in favour of a motion to consider low income and off-peak passes, “after the implementation of Winnipeg Transit’s Fare Collection System Update Project to provide for the review and development of intergovernmental partnerships as well as technical, financial, and administrative support systems that may be necessary” (City of Winnipeg, 2010).

There are various types of affordable transit initiatives being employed in Canada and internationally. The two primary reasons that these are implemented are to increase public transit use and/or to make transit more affordable (Serebrisky et al., 2009). This report is concerned with the latter, focusing especially on initiatives targeted at helping low-income individuals and families. The current types of programs being used include indirectly and directly targeted discounts. Indirect programs such as family passes and off-peak passes are universal, but operate under the implicit assumption that these will be utilized most by those with low incomes. Direct programs have eligibility restricted to those with low incomes, such as reduced transit tickets and reduced monthly passes. Some jurisdictions even have free transit, which may be either universal or needs based.

Family passes, off-peak passes, and reduced ticket programs have undergone little research, but are generally considered impractical due to their significant limitations (Hardman, 2015; Taylor, 2014; Dempster, 2009). It is not advised that these be implemented as standalone programs, although they could perhaps be used to supplement other affordability initiatives. Universal system-wide free transit models are the theoretical ideal, but are typically considered unfeasible for a city with the size and dispersion of Winnipeg (Perone & Volinski, 2003; Volinski, 2012). Needs based free transit could work since it is essentially a subsidy program with a very deep discount, although there was no available research that could be found on such a model. As such, this report will focus on reduced cost monthly passes. These are the most common transit initiatives currently used in Canada to benefit those with low incomes, and they are steadily increasing in number across the nation.

**METHODOLOGY & STRUCTURE**

Nineteen national affordable transit pass (ATP) programs were found and are each briefly profiled in Appendix A. Fourteen of them are permanent and five are pilots. Fifteen of the programs are municipal (seven with provincial funding and eight without), three are regional, and one is provincial. Of the nineteen ATP programs, nine of them are analyzed in more depth below. Eight of these are permanent and one is a pilot; six are municipal (three with provincial

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funding, three without) and three are regional. A review of eight international programs has also been very recently conducted by Toronto Public Health (2015) and is therefore not repeated in this report, but can be found in the list of references.

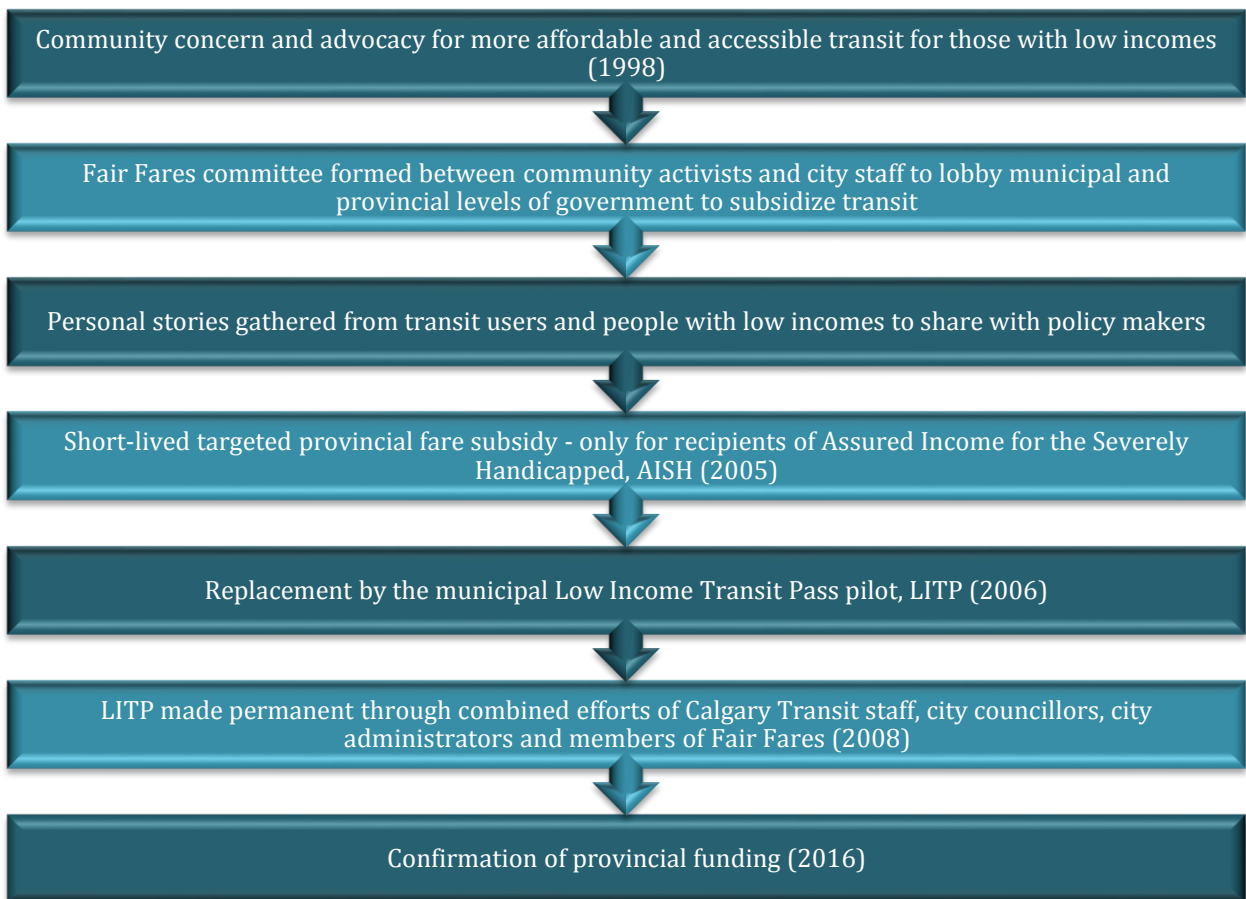
This paper reviews ATP program specifics in the following jurisdictions: City of Calgary, Region of Waterloo, Region of York, Region of Halton, City of Hamilton, City of Windsor, City of Kingston, City of Guelph, and City of Saskatoon. The establishment, funding, operation, challenges encountered, successful strategies, and impact are examined for each (much of which is adapted/updated from a 2012 review conducted by Dempster and Tucs for the City of Toronto). The paper then culminates in a final summary and comparison of all the programs profiled, out of which come brief options and recommendations for the City of Winnipeg.

*Note: This review is not wholly comprehensive, it is comprised of all the information that was publicly available at the time of writing; it is meant to give a preliminary understanding of the types of programs already being implemented and a guide to what can be learned from them. For a list of all information sources used for each jurisdiction see Appendix B.*

### **PROFILES: SELECTED CANADIAN ATP PROGRAMS**

#### **1. CITY OF CALGARY**

##### **1.1 Establishment**



##### **1.2 Funding**

For the first years of operation the cost of the LITP program was covered by an anticipated surplus in the Calgary Transit budget. During this time, continuation of the program

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was reliant on a sustained surplus. When the LITP program was approved as a permanent program in 2008, the municipal tax levy began to cover costs through an allotment to Calgary Transit. The city covered the full \$20 million per year costs until 2016 when the Government of Alberta confirmed \$4.5 million of yearly provincial funding to help supplement the program.

### 1.3 Operation

Calgary Transit operates the program. Applications for the LITP are accepted at the main transit office. Registration is open to all residents of Calgary 18-64 years old who meet the low-income criteria. With their application, registrants must provide an Income Tax Notice of Assessment (NOA) for all family members 18 years or older in the household. Applicants who are recipients of AISH can provide a Health Benefits stub or a current copy of an official letter stating their eligibility. Patrons who meet the criteria receive a confirmation letter, which they may then use to purchase a pass at any one of four locations. To reduce risk of fraud, registrants' names are maintained in a database, LITP passes have patrons' names on them and are non-transferable, and patrons must reapply annually. The passes were initially priced at just under half the regular adult pass (44%), with eligibility available to those falling below 75% of the before-tax Low Income Cut-Off (LICO). Eligibility has since increased to 100% of before-tax LICO in 2014, and the recent provincial funding has been touted as an opportunity to implement a sliding scale up to 130% of the LICO.

### 1.4 Challenges Encountered

- Logistical: establishing a benchmark for eligibility
- Financial: determining how the city's cost would vary with different criteria and different pass prices
- Administrative: finding ways to mitigate potential for fraud while still remaining non-stigmatizing and easily accessible

### 1.5 Successful Strategies

- Long-term community advocacy and involvement; the Fair Fares group continues to play a role in an advisory capacity
- Personal stories from people with low incomes helped councillors and staff appreciate the importance of the program and the barriers that regular prices create
- Studies conducted to assess costs (how many people would switch to the new pass) and appropriate fees (from the perspective of potential clients)

### 1.6 Impact



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In 2007, the City and Fair Fares collaborated to assess the program impacts. The responses were strongly positive.

### Positive

- 99% of respondents agreed that the pass was useful to them
- 97% agreed that life was better with a pass
- 55% pointed to financial benefits, 35% to increased mobility, 8% to general assistance, and 5% to reduced stress
- 90% had more money to buy things, 62% visited family and friends more often, 60% went to medical appointments more often, 59% were able to keep a job, 55% took more training/education classes, 49% found employment/better employment, and 48% volunteered more often

### Negative

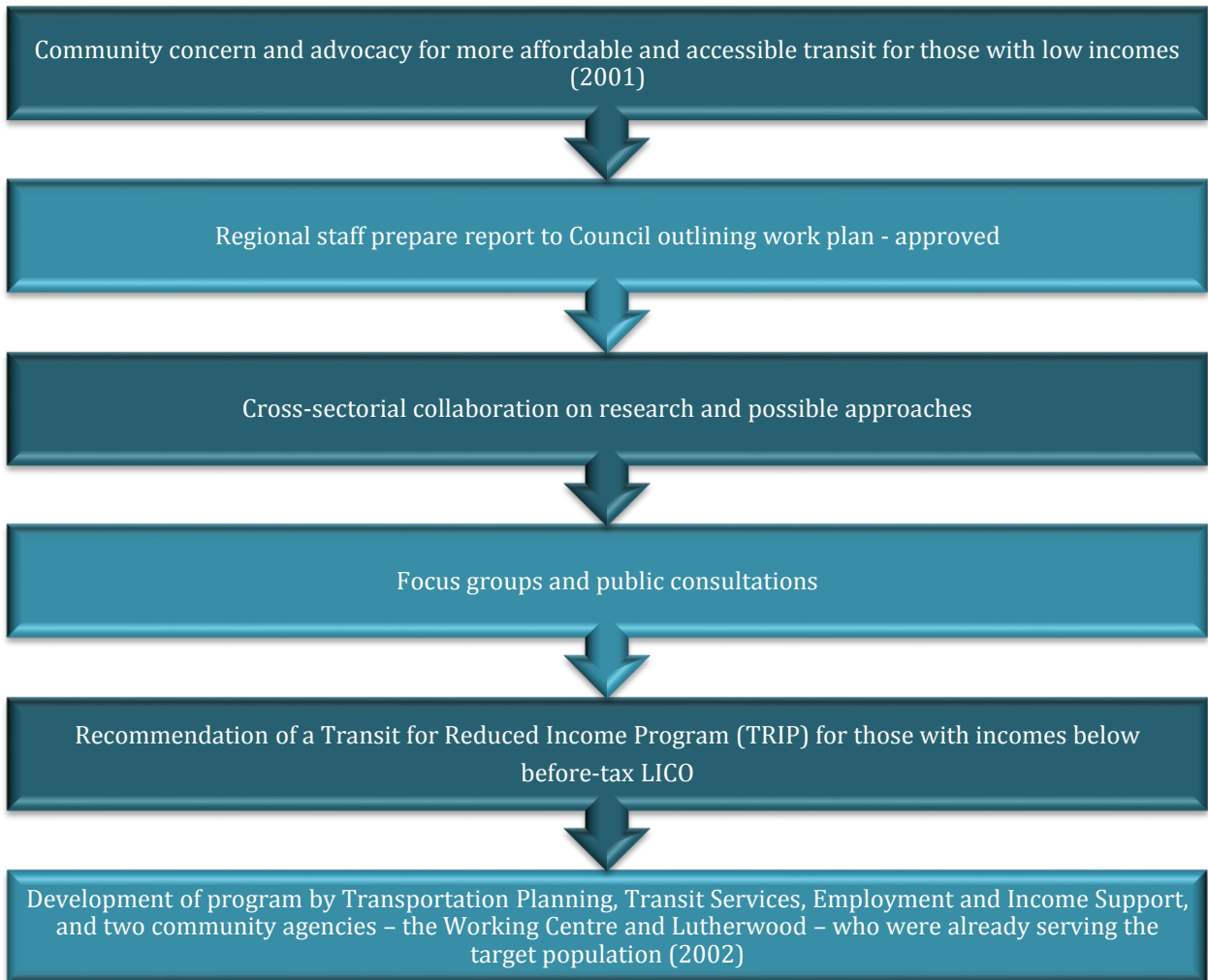
- 56% of respondents had previously bought a regular pass, 25% had purchased books of tickets, and new patrons only accounted for about 10%



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**2. REGION OF WATERLOO**

**2.1 Establishment**



**2.2 Funding**

TRIP funds are allocated to the Employment and Income Support department of Social Services 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 number of passes sold. Administration costs are covered by: Region of Waterloo’s Employment and Income Support (general administration), Transportation Planning (usage and projections), Grand River Transit (sales and marketing), and two community agencies, The Working Centre and Lutherwood (application and renewal). The total annual cost of the program in 2015 was \$407,000.

**2.3 Operation**

The application for TRIP is an honour-based process managed by two community agencies in the region. Applicants do not necessarily need to provide proof of income, as that is left to the discretion of agency staff who regularly work with the targeted demographic and may be well acquainted with the applicants. The program is capped at 2300 patrons, and a ratio of

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40% employed to 60% unemployed is sought (although the ratio is quite flexible). Registrants receive a sticker on the back of their transit identification card, after which they can buy a regular adult pass at the discounted price at any main bus terminal. The stickers are valid for one year.

The TRIP price was originally the same as the reduced rate for seniors and students. After review the discount was increased to 44%, largely due to slow uptake and the realization that it was still too expensive for many. Initially restricted to people who were employed, TRIP was also expanded to include people in receipt of OW/ODSP or with other sources of income. TRIP has an advisory committee of those involved in management and administration of the program. Meetings occur every couple of months and provide an opportunity to make necessary changes. The committee also updates TRIP operating principles and procedures every two years.

### 2.4 Challenges Encountered

- Finding the right formula for price versus number of passes available
- Recognizing the importance of revenue from the fare box for the transit system
- Complexity of application process
- Dealing with the success of the program (ex. long wait lists due to rapidly increased interest)

### 2.5 Successful Strategies

- Cross-sectorial partnerships including community partners whose work and mandates complements the program
- Consistency in committee membership
- Recognizing the importance of accessibility as well as affordability
- Avoiding stigmatization
- Raising awareness of the necessity of transportation for people with low incomes

### 2.6 Impact

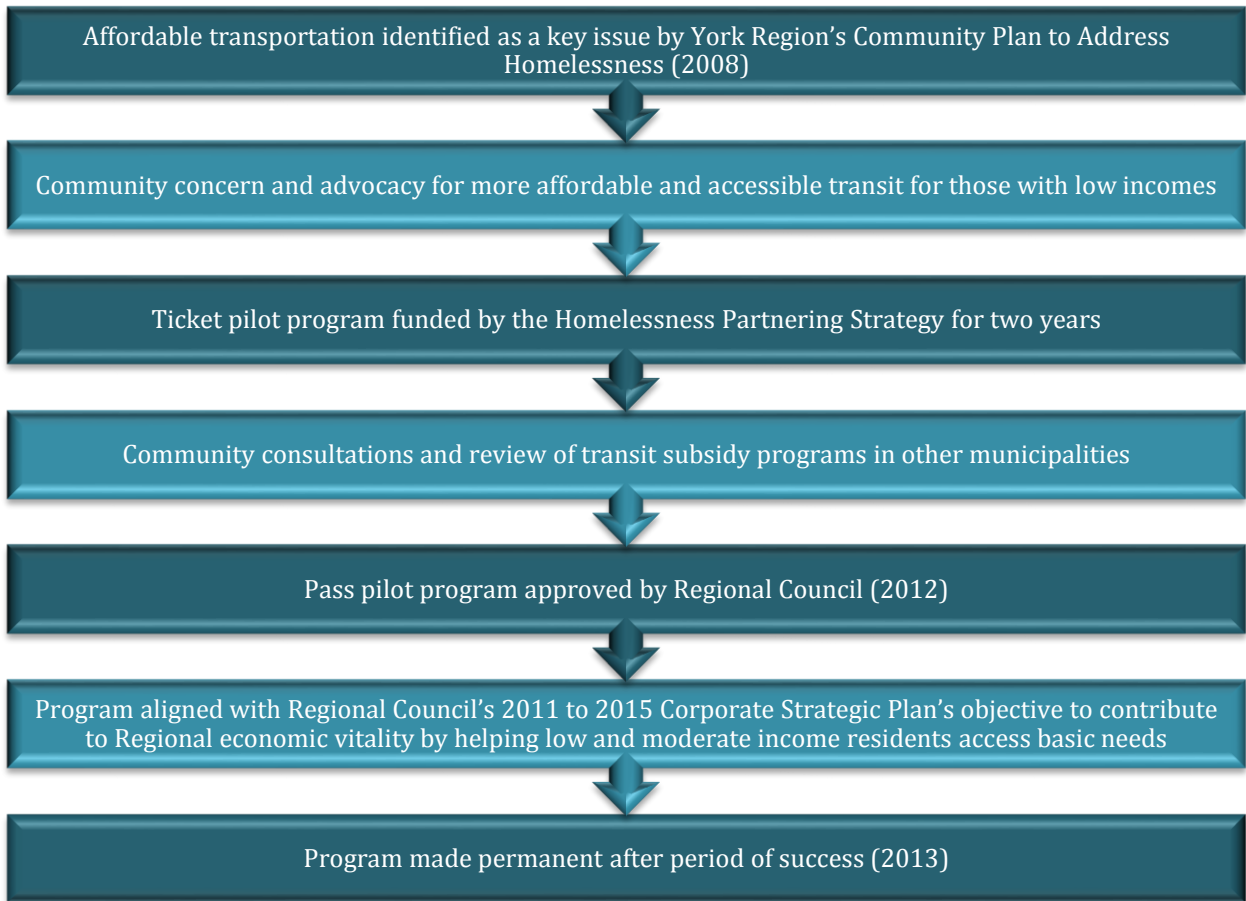
Evaluations of TRIP were undertaken in 2004 and 2013, showing that the program was well received and indicating continued benefits.

Positive	Negative	Recommendations
<ul style="list-style-type: none"><li>• Almost all respondents saw public transit as vital and 99% said access to a reduced monthly pass made a positive difference in their life</li><li>• Patrons reported increased community inclusion and socialization, as well as increased access to training, volunteer, and employment</li><li>• 62% of patrons purchased the TRIP pass every month</li><li>• Patrons relied on the bus much more when they had a TRIP pass (96% of the time) than when they did not have a TRIP pass (41% of the time)</li></ul>	<ul style="list-style-type: none"><li>• Many noted that availability of passes was limited, eligibility criteria excluded many that need assistance, and transit service was not always accessible or available</li><li>• The price of the reduced bus pass is still a significant amount for individuals with low income</li><li>• TRIP patrons commented that the barriers they face with regard to transportation are in relation to costs (of the bus pass and rising prices), the timing of buses, and the schedules and routes being inconvenient for their travels</li></ul>	<ul style="list-style-type: none"><li>• Continue efforts to improve service, with particular attention to diversity and to the needs of people who rely heavily on public transit</li><li>• Facilitate greater community involvement, specifically including low-income patrons in the design, planning and implementation</li></ul>

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**3. REGION OF YORK**

**3.1 Establishment**



**3.2 Funding**

The program had an initial budget of nearly \$1.33 million. With the majority allocated to passes (\$966,000), the remaining funds were allocated to tickets (\$250,000), to administrative expenses like staff and benefits (\$96,400), and to evaluation (\$15,000). The budget in 2014 went down to \$886,000. All the monies are paid to the Community and Health Services Department and are drawn from the York Region Social Assistance Reserve Fund, which is funded mainly through the municipal tax levy.

**3.3 Operation**

A working group comprised of regional staff members 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 in the summer of 2011 to design program specifics. The working group identified a set of principles for the program and considered ways in which to provide support for their target group: OW/ODSP recipients with employment-related criteria.

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By focusing on recipients of OW/ODSP, eligibility determination is facilitated through regular OW/ODSP case management processes. Development of a new application process was not required. Patrons are able to purchase transit passes at a 75% discount, and up to 1400 passes are available through the program. Program registrants receive six-months worth of vouchers, to be redeemed at York Transit's main office. Enrolment after six months may be renewed if the registrant has not found a job.

### **3.4 Challenges Encountered**

- Inconsistent funding

### **3.5 Successful Strategies**

- Alignment with municipal and provincial strategic plans: responding to the transportation needs of all residents was part of Regional Government's broader strategic plan and the Community and Health Services Department's Multi-Year Plan.

### **3.6 Impact**

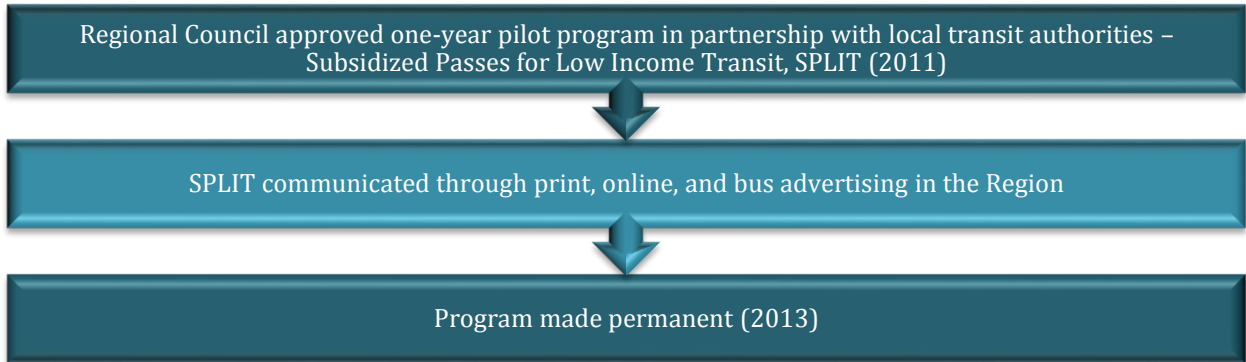
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**4. REGION OF HALTON**

**4.1 Program Establishment**



**4.2 Program Funding**

SPLIT is funded by regional social services but administered by the transit agencies, which have access to a database of eligible participants. Since inception the budget has more than doubled from \$300,000 to \$630,000 in 2014.

**4.3 Program Operation**

SPLIT covers 50% of monthly transit passes for seniors, students, and adults (including OW/ODSP recipients), respectively, who can demonstrate that their income is within 15% of the LICO (from most recent NOA). Individuals wishing to apply must contact the region by dialling 311 for an eligibility assessment. Upon approval, individuals can then purchase a pass from their local transit authority. Eligibility is reassessed annually.

**4.4 Challenges Encountered**

[Not available]

**4.5 Successful Strategies**

- Including para-transit/handi-transit programs and services
- Wide program outreach and communication
- Including both those receiving social assistance as well as those who are not
- Relating the program to municipal strategic plans/directions

**4.6 Impact**

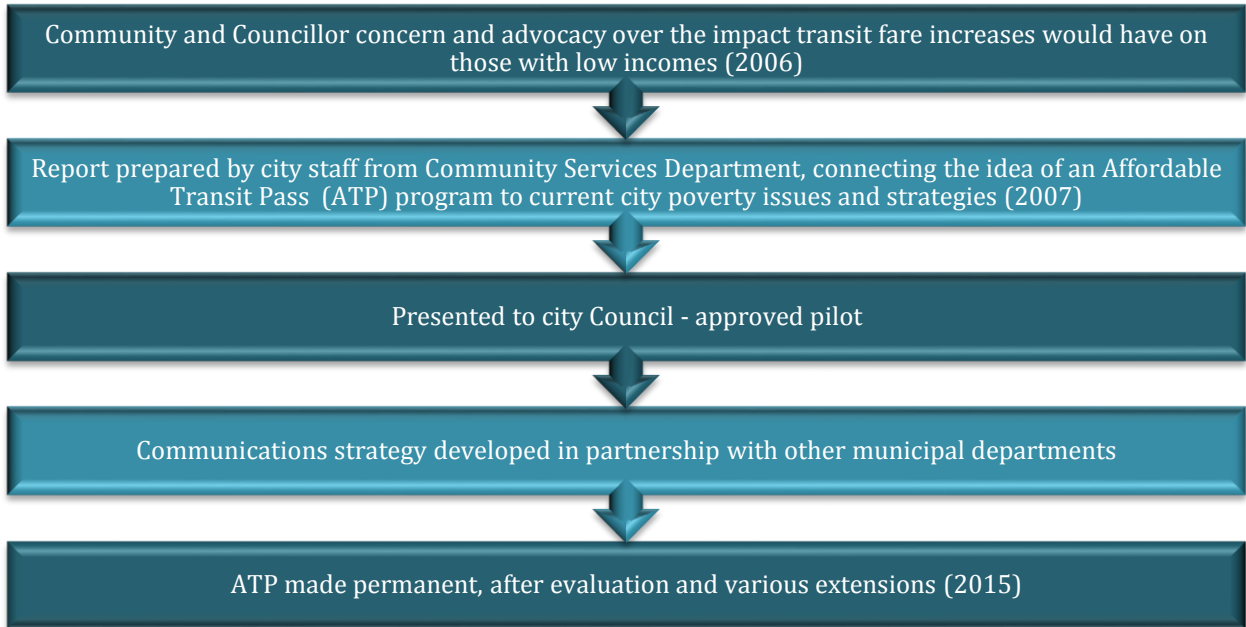
Upon completion of the SPLIT pilot, staff participated in a short assessment of the program.

Positive
<ul style="list-style-type: none"><li>•The program has been successful in terms of garnering interest and participation from low-income households and individuals in the Region</li><li>•Take-up has doubled since the program began</li></ul>

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**5. CITY OF HAMILTON**

**5.1 Establishment**



**5.2 Funding**

The report first recommending an ATP in Hamilton suggested that \$500,000 be taken from the Social Services Initiative Reserve to fund a one-year pilot project. That initial budget included monies for administration and staffing, assistance with communication, and program evaluation. Additionally, inclusion of OW/ODSP recipients laid the groundwork for a cost sharing agreement with the province subsidizing OW/ODSP patrons on an 80%-20% ratio (province-municipality). A proposal to make the ATP program more permanent was tabled in the 2011 budget negotiation. The proposal was successful.

For 2012, the ATP budget was approximately \$403,000, including administrative costs. Most of the budget is allocated to the Community Services Department for passes: \$261,000 (500 passes). The total amount includes a provincial contribution of \$102,900. That amount breaks down into \$64,800 for passes and covers half of the administrative costs in the Community Services Department (\$36,300 for staff and \$1,800 for other administration costs). The program budget also includes about \$65,000 allocated to Public Works – Hamilton Street Railway for a ticket agent and other administrative expenses. The total annual cost more recently went down to \$271,000 in 2015.

**5.3 Operation**

The ATP covers 50% of a regular monthly pass. To be eligible for the program one must be a working full-time, part-time, or casual (but not self-employed) with a family income that falls below after-tax LICO, or one must be a working recipient of OW/ODSP not receiving other transportation subsidies. An Income Tax NOA and four weeks' pay stubs are required with applications. Applications can be made through the Community Services Department and letters of approval are valid for six months. Patrons can purchase passes at the Hamilton Street Railway main ticket office by showing their letter of approval. Letters are signed each time that a pass is

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purchased to prevent anyone from purchasing additional passes. The City of Hamilton approves an average of around 600 applicants and the program has capacity for 500 monthly passes. When it does reach full capacity, the ATP program operates on a first-come, first-served basis.

### 5.4 Challenges Encountered

- Single downtown point of sale
- Slow uptake of program in the first few months

### 5.5 Successful Strategies

- Connecting the idea of an Affordable Transit Pass Program to municipal poverty issues and strategies
- Development of a communication strategy to increase program uptake
- Community-based poverty group provides periodic feedback and suggestions on the program, and members of the Public Works department are consulted occasionally with respect to program operation

### 5.6 Impact

Six months into the program there was a telephone survey to evaluate the program.

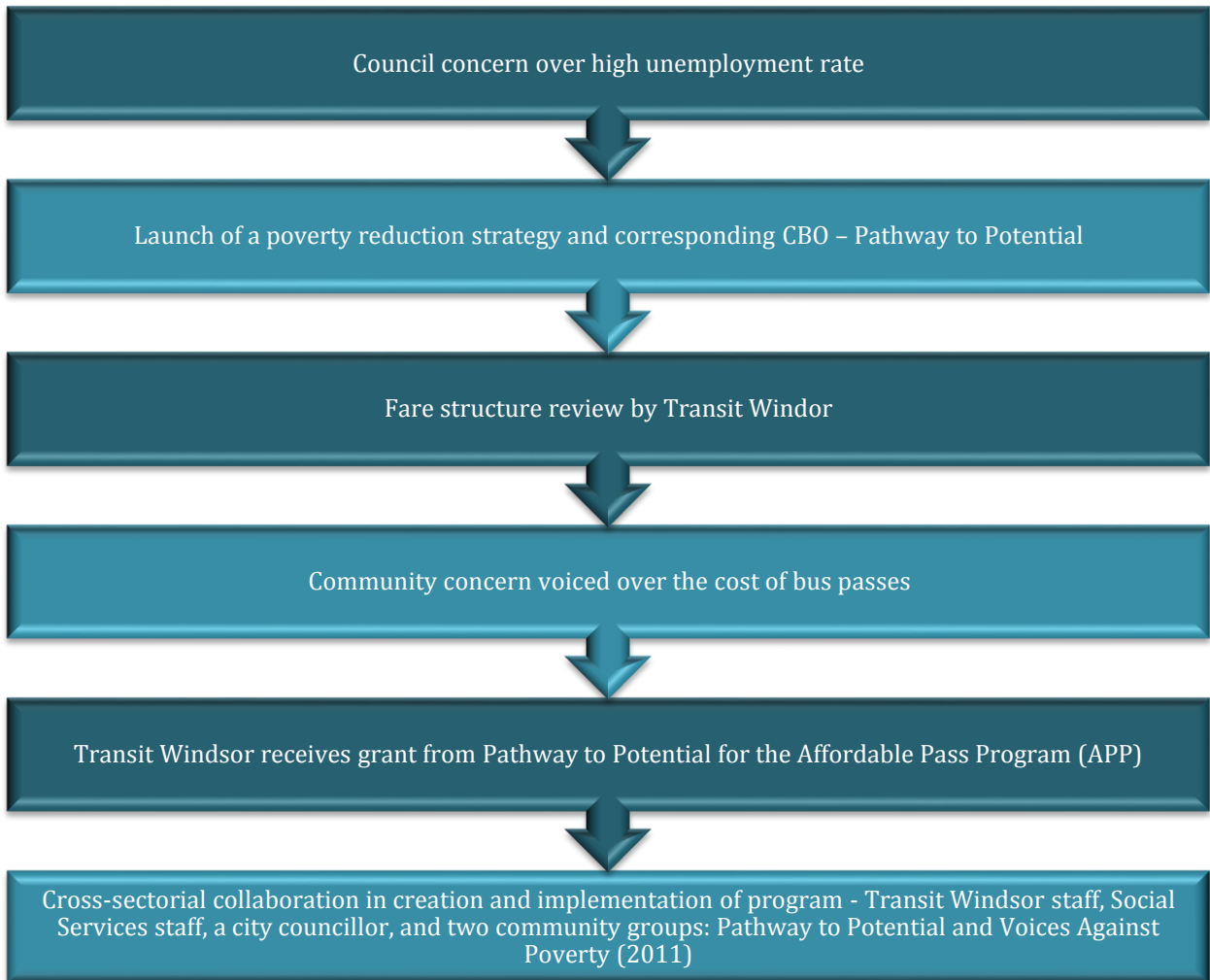
Positive
<ul style="list-style-type: none"><li>• ATP used most often to get to and from work (22%), grocery shopping/running errands etc. (20%) and personal appointments (19%)</li><li>• Helped patrons feel more independent (97%)</li><li>• Easier for them to get to work (95%)</li><li>• Made a difference in the family's budget (91%)</li><li>• Helped maintain a connection to family and friends (87%)</li><li>• Easier for them to run errands, schedule appointments, etc. (84%)</li><li>• Helped them to keep their job (75%)</li><li>• Many would not have been able to purchase a monthly transit pass without the ATP (73%)</li></ul>

Negative
<ul style="list-style-type: none"><li>• Only 5% increase in respondents who relied on public transit before versus after the registering in the program</li><li>• When asked about administrative aspects of the program applicants said they would prefer something other than the single downtown point of sale</li></ul>

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**6. CITY OF WINDSOR**

**6.1 Establishment**



**6.2 Funding**

Grant funding from Pathway to Potential covers the fare subsidy and administration costs. The funds are allocated to Transit Windsor. In 2011 program costs were approximately \$125,000, and in 2014 the budget for the program was \$200,000. The hope is that 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 limited tax increases, revenue generation to cover the subsidy and administration of the APP was noted as being critical to its continuation.

**6.3 Operation**

The initial uptake was slow, as with other similar programs, but the number of applicants increased as awareness of the program rose among eligible applicants interested in taking part in the program. There were 2500 patrons of the program in 2014. Applications are available online and at the Windsor transit terminal and centre. Free assistance completing the application is also

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available. Eligibility is based on after-tax LICO and may last 6-12 months depending on the applicant's circumstances. Applicants must provide proof of their combined household income. The APP covers 50% of a regular monthly pass.

### 6.4 Challenges Encountered

- Slow uptake
- Revenue loss

### 6.5 Successful Strategies

- Non-confrontational communication between staff
- Exchange of information, knowledge, and experiences amongst stakeholders (inclusive of prospective pass users)

### 6.6 Impact

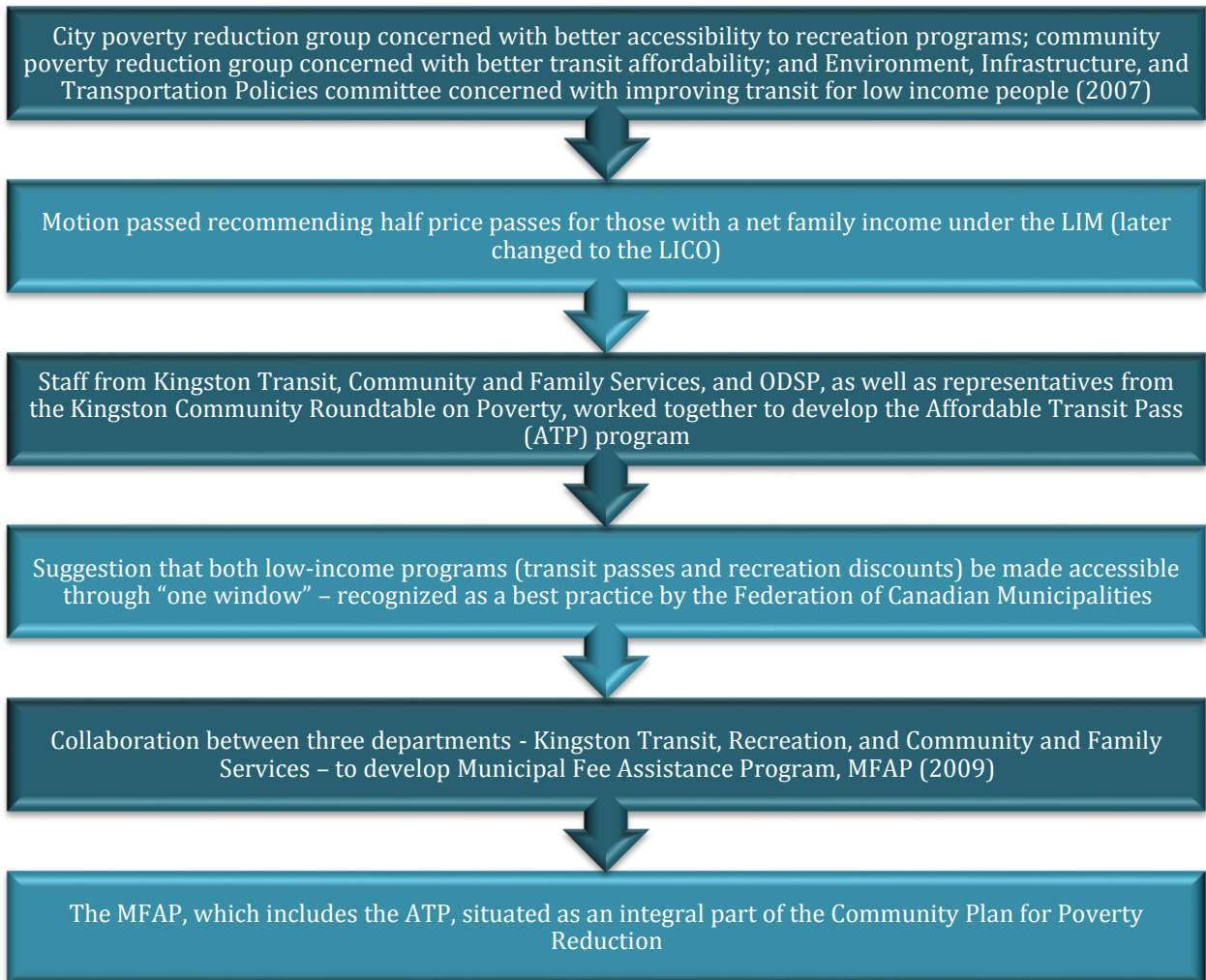
Pathway to Potential and Transit Windsor plan to continue to assess the impact of the APP. Anecdotally, impacts have been positive to date.

Positive	Negative	Recommendations
<ul style="list-style-type: none"><li>• 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</li></ul>	<ul style="list-style-type: none"><li>• Transit Windsor is aware that fares have been and remain a barrier for some patrons</li></ul>	<ul style="list-style-type: none"><li>• Provide quality service and increase the accessibility, affordability, and availability of transit services</li></ul>

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**7. CITY OF KINGSTON**

**7.1 Establishment**



**7.2 Funding**

The ATP program is funded through municipal taxation. Partners developing the program thought the loss in revenue resulting from the discounted fare might be recovered by increases in ridership. However, even though the program was more successful than anticipated, this cost recovery has still not occurred. The actual cost of the program in 2010 was \$165,000 instead of the estimated \$108,000. Kingston Transit absorbs the cost of the ATP program, other than costs related to administration. The Community and Family Services Department manages the administration costs.

**7.3 Operation**

The program provides a 35% discount off the price of a monthly transit pass for residents of Kingston, inclusive of adults, children, youth, and seniors in low income households, and OW/ODSP recipients, as measured by the after-tax LICO. The application process is friendly, quick, and simple. Application can be made on a drop-in basis at the Community and Family

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Services Department or at a number of alternative locations. There is no cap in regard to the number of passes issued. 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 be purchased online, providing a more accessible option for those who have access to technology. Those receiving social assistance 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.

### 7.4 Challenges Encountered

- Administrative approach for the MFAP is unique and entailed considerable learning
- Need to ensure quick implementation of the program and reduce applicants' stress or anxiety
- Municipal departments involved did not commonly work together

### 7.5 Successful Strategies

- Poverty was one of Council's top concerns, and the province was also concerned with poverty in Ontario
- Good communication across municipal departments – community services staff as bridge
- Access to quality research on best practices, and useful data on potential applicants
- Adapting processes, procedures, and tools developed by others
- Administrative process that is simple and unobtrusive
- Application procedures that can be easily implemented at any service/intake location
- Clear information sharing protocols
- Training for front line staff
- Invaluable input from the Kingston Community Roundtable on Poverty
- The one-window approach reduces the need for multiple applications, and the sharing of income information across several municipal departments.

### 7.6 Impact

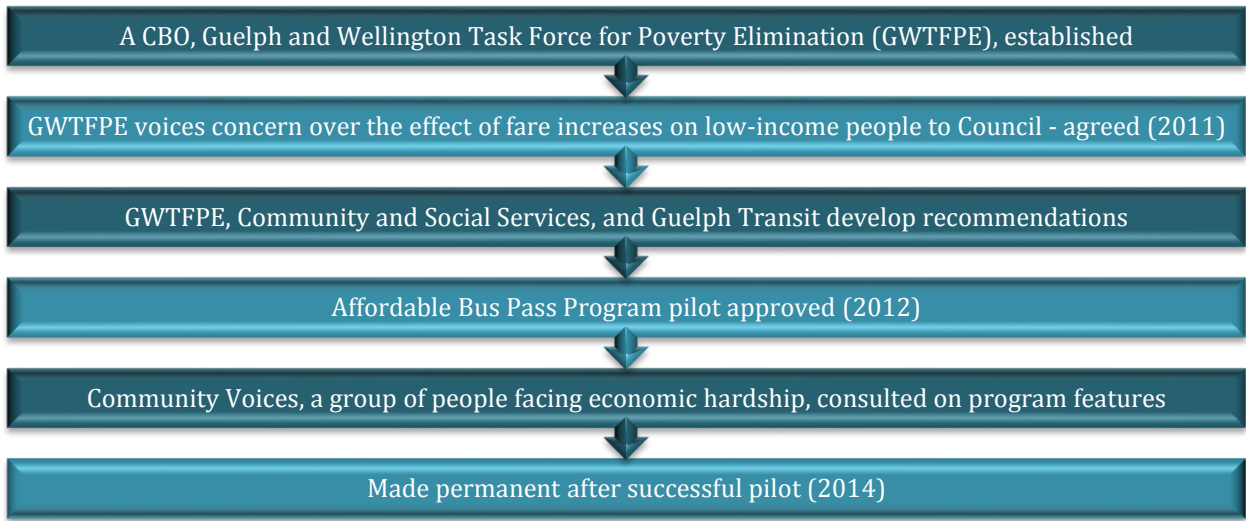
Approximately 2400 households completed MFAP applications during the first two years of operation.

Positive	Negative	Recommendations
<ul style="list-style-type: none"><li>•80% of households accessing the program were on social assistance while the remaining 20% would be classified as “working poor”</li><li>•Between Nov 2011 and the launch of the ATP program, 657 individuals purchased at least one monthly discounted transit pass</li><li>•ATP riders average about 38 trips per month, which is consistent with the regular adult monthly pass riders</li></ul>	<ul style="list-style-type: none"><li>•The point was raised that public transit does not always meet the need of city dwellers, inclusive of those who live in low-income households</li></ul>	<ul style="list-style-type: none"><li>•People with low incomes may require something in addition to public transit (ex. a car or taxi) given challenges surrounding the accessibility and availability of public transit that may limit the utility of a discount bus pass</li></ul>

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## 8. CITY OF GUELPH

### 8.1 Establishment



### 8.2 Funding

The Affordable Bus Pass Program (ABPP) is covered through municipal taxes. In December 2011 City Council passed the next year's operating and capital budgets, also approving a 3.52% tax hike, the ABPP pilot, and reinstatement of bus service on some statutory holidays. The ABPP alone required a tax increase of over 3%, for implementation of the program mid-year. The cost of the program in 2012 was \$135,000.

### 8.3 Operation

Passes are priced at 50% of the regular bus pass for youth, adults and seniors, respectively. Residents of Guelph are eligible for the program if they are low income, based on the LICO, and experiencing barriers to accessing public transit. Patrons must reapply annually. To avoid a complicated and stressful application process, program designers first committed to developing a person-centred, transparent and reasonable application process. Applications are available at the various locations throughout the city: City Hall, Guelph Transit, Evergreen Seniors Community Centre, and West End Community Centre. Passes can be purchased at the same locations once an approval letter has been received. The program has no cap and had 1800 patrons in 2012.

### 8.4 Challenges Encountered

- Financial: difficulty estimating cost recovery/loss of revenue, increase in ridership, and change in service requirements
- Workload: no dedicated ABPP staff, more staff time required than was expected, program uptake exceeded forecasts
- Data collection: data collected by three very different means (application forms, sales data from all locations that sell affordable passes, and pass swipes on the buses used by transit to track ridership). Each of these databases is managed by a different team and organized in a different way.



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### 8.5 Successful Strategies

- According to those involved, the ABPP’s establishment was without incident, in large part because of the commitment to poverty reduction among council, community organizations, and the public
- Public transit is seen as contributing to Guelph’s sustainability
- Examining similar ATP programs in other municipalities
- Proactive marketing of the program to counteract the lag that has been noted in many ATP’s between the launch of the program and the widespread use of the pass

### 8.6 Impact

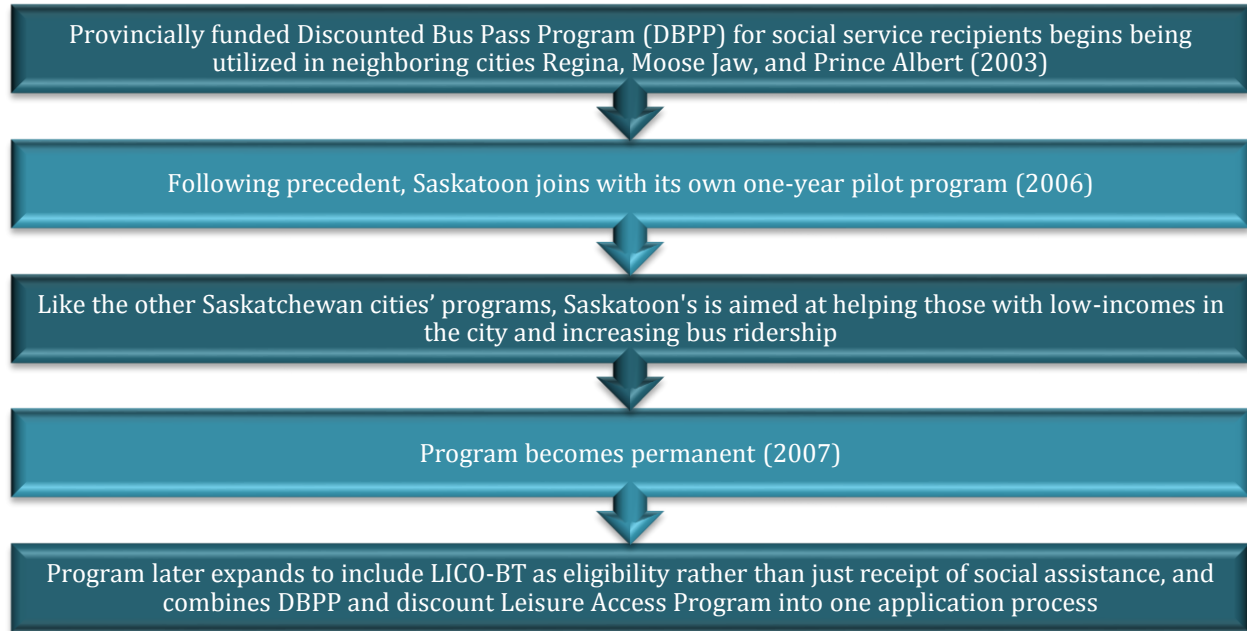
In 2013 an evaluation study was performed, indicating many positive results and recommending some areas for further improvements.

Positive	Negative	Recommendations
<ul style="list-style-type: none"> <li>• An estimated 27% of people living below the Low Income Cut-off in Guelph have become users of the ABPP</li> <li>• It has built financial assets by reducing the cost of transit</li> <li>• It has built physical assets by enabling users to get to work, apply for jobs, and access the services they need more consistently</li> <li>• It has built social assets by enabling users to make more trips for a greater variety of reasons and in a more flexible way</li> <li>• Four primary program goals were met:               <ul style="list-style-type: none"> <li>• Enabling more residents living with a low income to purchase monthly transit passes</li> <li>• Making a positive impact on the budget of low-income residents</li> <li>• Improving perceptions of overall wellbeing</li> <li>• Improving sense of contribution to community</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• The total number of applications has exceeded the original estimate (of 1,800 applications) by 50%</li> <li>• Almost all affordable bus pass users (96%) had used Guelph Transit before entering the program: of the 910 re-applicants who stated that they were transit users prior to the ABPP, 47% were previous subsidized pass holders, 35% used cash and/or tickets, and 19% used a regular bus pass</li> </ul>	<ul style="list-style-type: none"> <li>• Explore extending turn-around times for applications, while maintaining customer focus</li> <li>• Consolidate and rationalize the application and sales databases</li> <li>• Review and streamline the process for analyzing and reporting program data</li> <li>• Create a dedicated program manager position and simplify the program structure</li> <li>• Assign additional staff time to the Service Guelph desk on “Bus Pass Days”</li> <li>• Explore the possibility of having key partners play a larger role in selling passes</li> <li>• Consider an alternate approach to income verification for users who are on ODSP/OW or users whose income is in transition due to recent unemployment, immigration or transition from school to work</li> <li>• Provide a plain language summary of the eligibility criteria and the application process</li> <li>• Create a formalized, transparent appeals process</li> </ul>

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**9. CITY OF SASKATOON**

**9.1 Program Establishment**



**9.2 Program Funding**

The DBPP is partially funded through the provincial government's Ministry of Social Services, with the remainder from municipal taxes. The province contributed a total of \$1.6 million to programs in the seven largest Saskatchewan cities in 2014: Saskatoon, Regina, Prince Albert, Moose Jaw, North Battleford, Swift Current, and Yorkton.

**9.3 Program Operation**

The DBPP allows low-income Saskatoon residents the opportunity to purchase a monthly bus pass at a reduced rate. It is part of the Low Income Pass, which combines the DBPP with the subsidized Leisure Access Program into one application process. Eligibility is based on falling below the before-tax LICO or receiving social assistance. If eligible, patrons receive a 22% discount on their monthly bus pass. For low-income residents, application forms are available at all City of Saskatoon leisure centres and at the Customer Service Centre. Applicants must include their NOA and mail the completed application to the Community Development Branch. For social assistance recipients, application forms are available at the Social Services office. The completed forms can be dropped off at Saskatoon Transit to purchase the reduced pass. Patrons are accepted to the program for one year at a time, after which they must be reassessed. The DBPP does not have any cap set on the number of patrons.

**9.4 Challenges Encountered**

[Not available]

**9.5 Successful Strategies**

- Similar programs had already been running in neighbouring cities for three years
- Combined low-income subsidies for transport and recreation into one application

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**9.6 Impact**

Since its inception the Saskatoon program has continued to expand.

Positive

- Now includes both receipt of social assistance and LICO-BT as eligibility, to include the "working poor"



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**SUMMARY & COMPARISON**

**Program Establishment**

The key factors that played a role in establishing the ATP programs profiled are: advocacy on the part of community groups and champions within government; awareness of the importance of transportation for those living on low incomes; and impending change that would make transit less affordable (Dempster & Tucs, 2012). Other important factors include an in-depth study of transportation options, development of committees to assist in operationalizing programs, inter-sectorial collaboration, and justifying the programs through existing municipal and provincial poverty reduction strategies. When analyzing the establishment process of the various programs profiled in this report there seems to be a typical linear trend that they followed. It may be summarized into four phases:

- Phase 1 Impetus & Advocacy – includes public concern and community involvement
- Phase 2 Research & Proposal – includes public consultations and review of similar initiatives
- Phase 3 Development & Implementation – includes multi-sectorial collaboration and a communications strategy
- Phase 4 Evaluation & Expansion – includes the switch from pilot to permanent programs as well as reducing rates/increasing caps/expanding eligibility

**Program Funding**

Many aspects of funding for affordable transit passes have been explored, such as how programs are funded, fund allocation, administrative costs, and revenue generation or loss. Primary funding for most programs comes from the municipal tax base. With just under half ( $n=8$ ) of the 19 Canadian programs profiled receiving any form of provincial support, funding is an ongoing concern. In some jurisdictions the programs are operated by social service departments, while in others they are run directly by transit authorities. On the one hand, allocating funds to social services may be advantageous in that it allows for an appeal to the province for ongoing support; on the other hand, allocating funds to transit budgets may be advantageous due to reduced potential for caps and cuts (Dempster & Tucs, 2012). The administrative costs for the different programs profiled are variably carried by social services, transit authorities, community agencies, or some combination. Revenue generation or loss is the most difficult aspect to estimate with some communities reporting large increases in ridership (Kalinowski, 2014), and other communities reporting overall revenue loss (Tanasescu, 2007). The key question one must consider: is most of the target group already purchasing transit passes, or will providing the discount lead to increased sales that will offset the cost?

**Program Operation**

The most salient elements of program operation are the eligibility criteria, the application process, the sale of passes, and the partnerships involved. The most common ATP program eligibility is based on receipt of social assistance and/or falling below the LICO (either before- or after-tax). However, it is important to note that the former may exclude the “working poor” and the latter may be considered inadequate because it is too low and not based on the cost of living (Citizens for Public Justice, 2013). Pilot programs in three municipalities—Mississauga, Guelph, and Kingston—have suggested using the Low Income Measure (LIM) instead. An NOA is the

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most common way to assess eligibility, but this may be problematic for those who do not file income tax returns (eg. homeless individuals) and it does not necessarily reflect an individual's current circumstances. The Region of Waterloo has circumnavigated this issue by having community agencies already familiar with the clientele dole out passes through an honour-based system (Dempster, 2009). "One window" eligibility for recreation subsidies and discounted monthly transit passes has been recognized as a best practice as well (Federation of Canadian Municipalities, 2010), and is currently being used by Calgary's Fair Entry program, Kingston's Municipal Fee Assistance program, and Saskatoon's Low Income Pass program. In regards to the sale of passes, processes that are non-stigmatizing are overwhelmingly favoured, with passes that look exactly the same as regular passes. Central sales locations have been found to create accessibility barriers for patrons, but are also beneficial due to having qualified staff and central database systems. Throughout the entirety of program operation, partnerships and collaboration are vital. Consensus and a readiness among leading partners like city councils, transit authorities, social services, and community groups to work together facilitated establishing and continuing the operation of programs.

### **Challenges Encountered**

Challenges encountered by the various programs profiled were logistical, administrative, or financial in nature. Logistical challenges were the most common, for instance establishing a benchmark for eligibility, finding way to mitigate potential for fraud while still remaining non-stigmatizing, and dealing with the complexity of the application process. Administrative challenges were also common, for example training and learning involved with the new program, no dedicated staff for the program, and dealing with long waitlists due to higher uptake than anticipated. Lastly, financial challenges were encountered, such as loss of revenue, inconsistent funding, and finding the right formula for price versus number of passes.

### **Successful Strategies**

Many of the municipalities found creative ways to mitigate the challenges. Analysis reveals that in their establishment ATP programs are most likely to succeed with the support of long-term community advocacy and cross-sectorial partnerships. They were also aided by rigorous research and relevance to current poverty reduction strategies. Accessibility was improved through clear information sharing protocols and using a single, simple and unobtrusive application process. Quick program uptake was ensured through wide communication strategies, and exchange of information amongst stakeholders similarly improved results. Finally, many of the programs strove to be as inclusive as possible, extending eligibility to both those receiving social assistance and those who are not.

### **Program Impacts: Benefits and Weaknesses**

Many pilot programs have developed into permanent programs due to their success. Four of the longer-term programs have undergone formal evaluation (Region of Waterloo, 2013; Taylor Newberry Consulting [Guelph], 2013; City of Hamilton, 2008; HarGroup Management Consultants [Calgary], 2007). In each case, results have been used to support program continuation and/or expansion. The clearest indicator of success is the rise in consistent use of public transit within the low-income population. This trend was seen throughout all jurisdictions profiled, and take-up has even doubled in some of them. Benefits can also be viewed from the perspective of patrons, who considered the programs vital and effective in creating a positive difference in their lives. With the passes, patrons had more money to buy other things, visited

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family and friends more often, went to medical appointments more often, took more training/education classes, found employment/better employment, and volunteered more often. Various low-income residents across Canada have had the opportunity to participate in ATP programs, including people on social assistance, people living with disabilities, youth, seniors, and the working poor. Each of these populations has gained valuable financial, physical, social, and quality of life assets as a result:

- Financial assets – reduced cost of transit resulted in more money to provide for other basic needs (eg. food and rent)
- Physical assets – increased mobility enabled users to get to work, apply for jobs, and access the services they need more consistently (eg. training/education and medical appointments)
- Social assets – users were able to make more trips for a greater variety of reasons and in a more flexible way; passes were used most often for getting to and from work, grocery shopping/running errands, and personal appointments, but could also be used to go out to events and community meetings more often
- Quality of Life assets – feeling more independent, improvements in family budget, maintaining connection to family and friends, greater sense of contribution to community, increased social inclusion, and reduced stress

While patrons and others celebrated the numerous benefits of the programs, they made several qualifications, too. Passes are still considered unaffordable for many, even at the reduced rates. Not enough passes are available in jurisdictions with caps, and restrictive eligibility criteria exclude many that require assistance. Furthermore, a greater diversity in types and points of sale is needed, rather than just one or a limited number. These barriers overlap with other limitations surrounding accessibility and availability of public transit. That is to say that the timing of buses and inconvenient schedules/routes can restrict the overall utility of an ATP program, regardless of the rate of discount.

It is important to try to broadly consider the full benefits of such discount transit programs. Most evaluations view the impact in narrow terms of direct benefits reaching only those involved in the programs. However, researchers suggest that a complete and comprehensive cost-benefit analysis considering the wider health, educational, economic, and social impacts of these programs would likely illustrate even greater value than they are currently credited with (Dempster & Tuca, 2012). Consider, for example, instances where vast amounts of money are being spent on social service programs, but the target population remains unable to access them because they lack the money required to take the bus. Such factors must also be addressed in evaluations going forward.



## **CONCLUSION & RECOMMENDATIONS**

Research has identified access to affordable transportation as a significant feature in reducing income inequalities and improving quality of life (Muntaner et al., 2012; Litman, 2012). The growing number of income-based Affordable Transit Pass programs across Canada in recent years attests to the veritable possibility of implementing, continuing, and expanding such programs. This brief review found that nineteen municipalities across Canada have ATP programs in place, and two more are seriously considering implementing soon (Peterborough and Halifax). With this number steadily increasing, clearly it is time for the City of Winnipeg to step up as well. Winnipeg is one of the only major cities in Western Canada that is not currently running a pilot or permanent ATP program. Additionally, all provinces west of Manitoba have some form of provincially subsidized ATP programs. The main recommendation of this report is for the City of Winnipeg to implement its own ATP program, ideally with provincial support and funding. Other key learning and unique recommendations for the development of this ATP are as follows:

- Although the LICO is most common in other jurisdictions, the LIM may be a more appropriate benchmark measure for the target population
- The NOA may not adequately reflect an individual's current circumstances and therefore may not be ideal as the standalone method for assessing eligibility; community agencies familiar with the target population could be given the flexibility to manually override
- All of these "affordable" subsidized programs (usually ~50% discount) still found in their evaluations that the cost is too high for many, so a sliding scale may be a useful addition; this was recently approved and will soon be implemented in the City of Calgary, with the proposed discount ranging from 50-95% off the cost of an adult monthly pass
- Combine the ATP application process with the Recreation Fee Subsidy Program that is already being offered in Winnipeg, as this has been identified as a national best practice
- All possible perspectives and partners (especially relevant community groups and individuals experiencing poverty) should be considered and involved when working out details of program design, planning, implementation, and evaluation
- Ensure that an evaluation plan is developed into the program design, gathering both quantitative and qualitative data from patrons; this has been integral in many of the programs profiled to show areas of success and drive continued improvements

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**APPENDIX A: Brief Profile of All Canadian Affordable Transit Pass Programs**

Location	Program Name	Discount	Eligibility	Funding	Started	Cost (year)	Cap (n=?)	Users (year)
Calgary	Low Income Monthly Pass	56%	LICO-BT	City & Province	2005	\$20,000,000 (2016)	No	25000 (2016)
Waterloo Region	Transit for Reduced Income Program	44%	LICO-BT, honour-based	City	2002	\$407,000 (2015)	Yes (n=2300)	2300 (2013)
York Region	Transit Fare Subsidies Program	75%	OW/ODSP and working	City	2012	\$886,000 (budget 2014)	Yes (n=1400)	623 (2014)
Halton Region	Subsidized Passes for Low Income Transit	50%	LICO-BT	City	2011	\$630,000 (budget 2014)	No	550 (2016)
Hamilton	Affordable Transit Pass Program	50%	LICO-AT, OW/ODSP, and working	City & Province	2008	\$271,000 (2015)	Yes (n=500)	500 (2012)
Kingston	Affordable Transit Pass	35%	LICO-AT	City	2009	\$165,000 (2010)	No	<i>not found</i>
Guelph	Affordable Bus Pass	50%	LICO	City	2012	\$135,000 (2012)	No	1800 (2012)
Saskatoon	Discounted Bus Pass Program	22%	LICO-BT or social assistance	City & Province	2006	<i>not found</i>	No	<i>not found</i>
Regina	Discounted Monthly Pass	70%	Social assistance	City & Province	2003	<i>not found</i>	No	2250 (2014)
Moose Jaw	Discounted Bus Pass	70%	Social assistance	City & Province	2006	\$54,000 (2014)	No	2400 (2014)
Prince Albert	Reduced Bus Pass	75%	Social assistance	City & Province	2006	\$190,000 (2014)	No	<i>not found</i>
Cornwall	Community Bus Pass	35%	OW/ODSP - first come, first served	City	2009	<i>not found</i>	Yes (n=150)	150 (2012)
Banff	ROAM Low Income Transit Pass	100%	LICO, AISH, or Alberta Seniors benefit	City	2007	<i>not found</i>	No	<i>not found</i>
British Columbia	BC Bus Pass Program	\$45/yr	Low-income seniors and persons with disabilities	Province	1967	<i>not found</i>	No	1200 (2012)
Windsor - Pilot	Affordable Pass Program	50%	LICO-BT, OW/ODSP	City	2011	\$200,000 (budget 2014)	No	2500 (2014)
Moncton - Pilot	Affordable Transit Program	50%	Subsidized tickets provided to community agencies	City	2016	\$22,000 (2016)	<i>not found</i>	<i>not found</i>
Sudbury - Pilot	Affordable Transit Pass Program	50%	LICO-BT, OW/ODSP, and working	City	2016	<i>not found</i>	<i>not found</i>	<i>not found</i>
Mississauga - Pilot	MiWay Affordable Transportation	50%	LIM-AT - first come, first served	City	2016	\$1,300,000 (budget 2016)	Yes (n=2500)	<i>not found</i>
Edmonton - Pilot	Low Income Transit Pass	60%	LICO	City & Province	2017	<i>not found</i>	<i>not found</i>	<i>not found</i>

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**APPENDIX B: List of All Information Sources by Jurisdiction**

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